

Cases Portfolio

ENLG 7721
Julia Warren
7/18/2018

Table of Contents

| | |
|---|---------|
| Case 1: Launching our Technical Communication Department | Page 3 |
| Case 2: Staffing, Salary Schedules, and Employee Recognition Memorandum | Page 6 |
| Case 3: <i>Midas</i> Help Site Development Estimation Memorandum | Page 9 |
| Case 4: <i>Midas</i> User Documentation Project Proposal | Page 10 |
| Budget Estimation Appendices: | |
| A: Technical Communication Estimation, Help System | Page 17 |
| B: Technical Communication Estimation, Job Aid | Page 18 |
| C: Technical Communication Estimation, Getting Started Document | Page 19 |

LAUNCHING OUR TECHNICAL COMMUNICATION DEPARTMENT



6/28/2018

Goals and Objectives

From the desk of the technical communication group manager.

Julia Warren | Case 1 | ENGL 7721

Launching our Technical Communication Department

PAGE ZERO

Aardvark is working from the ground up, from “page zero”; we have never had a technical communication department, and unfortunately, it shows in the documentation we put out to consumers. Our products are consistently at the high end of the quality spectrum, but again and again, users report frustration. We look toward continuous improvement and customer satisfaction with our hardware and software. Let’s do the same with our user guidelines so that our brand is known for its consistency, clarity, and quality. Simplicity in documentation does not necessitate a lack of complexity in our software and hardware capabilities. With the launch of the technical communication department, we will be sure to blend soft goals with hard targets and balance input from project stakeholders so that our users feel empowered to “do it right the first time”.

Goals and Objectives

Goal 1: Prepare consistent, clear, and concise documentation that enables our users to do it right the first time.

Objective 1:

Expand the technical communication department to a full staff of four people in six months, and eight people in 18 months. We will bring on individuals well-suited to our positions who fit in a culture of success. Our new employees will have a history of responsibility and proven records of thinking outside the box.

Objective 2:

Construct a brand and style guide that ensures consistency in all of Aardvark’s documentation. We will garner input from stakeholders, perform a competitive analysis, and go through user surveys to ensure that our brand guide is consistent with our reputation of quality.

Goal 2: Cut the hotline call yearly rate in half.

Objective 3:

Revise the Cashometer software user documentation using input from engineers, hotline call records, and end-users. Revising this documentation as soon as possible will cut a significant portion of our post-purchase queries and will enable us to stay in front of potential user confusion and frustration in all new releases.

Objective 4:

Review hotline call records by frequency and **build an “FAQ and Troubleshooting” page** for the Aardvark website for all of our software products.

**Goal 3: Completely eliminate the need for site visits
for the *Finalysis* software.**

Objective 5:

Establish a relationship with the *Finalysis* product’s engineers by **observing the installation and set-up process**. The tech comm department will quickly establish itself as integral to the product development and release process. We will communicate with engineers at all stages of development and roll out a joint user testing process so that while engineers perfect the software, we can perfect the documentation.

Objective 6:

Devise a “from page zero” universal documentation development procedure. We will apply technical communication principles to already-successful products in order to maximize the consumer’s potential.

**Goal 5: Keep technical communication employee retention rates at
100% over four years**

Objective 7:

Cultivate an environment of trust where tech comm employees feel valued. This is crucial for the long-term health of our department.

CONCLUSION

We have figured out why our customers face the frustrations that they do. Technical communication expertise can help. We will keep costs down and keep our customers happy with our product.

Memorandum

TO: Maureen O'Shea

FROM: Julia Warren, Manager, Aardvark Technical Communication Group

CC: Aardvark HR, Bucky Ardmore, Gina Varcone

DATE: 7/3/2018

SUBJECT: Staffing, Salary Schedules, and Employee Recognition

Aardvark technical communication is one person strong at the moment. We will be bringing on three additional staff shortly but planning for the future of the department is important. Having a long-term hiring strategy is crucial for our department's sustainability. The information below is based on the anticipated staffing needs of our department as well as industry information.

Below is the department's proposed staff salary schedule, which plans for not only competitive entry salaries, but room for title and responsibility growth as well.

Salary Schedule

| Title | Level | Education/Experience |
|--|--|--|
| Technical Writer, \$47,000-\$52,000/yr. | Entry technical writing position. | Bachelor's degree and 2+ years related experience |
| Senior Technical Writer, \$52,000-\$60,000/yr. | Additional responsibilities or training. Some process supervision. | Bachelor's degree and 5+ years related experience |
| Technical Communication Specialist, \$47,000-\$54,000/yr. | Entry position. Specialists: multimedia or graphic design | Bachelor's degree and 2+ years related experience |
| Senior Technical Communication Specialist, \$55,000-\$60,000/yr. | Additional responsibilities or training. Some process supervision. | Bachelor's degree and 5+ years related experience |
| Senior Technical Communicator, \$65,000-\$70,000/yr. | Project management responsibilities; helps generate procedures and optimize processes. | Master's degree in related field and 5+ years related experience |
| Associate Director of Technical Communication, \$68,000-\$80,000/yr. | Project management responsibilities; may substitute/travel for Director of TC. | Master's degree in related field and 8+ years related experience |

Competitive salary information sourced from: <https://www1.salary.com/NC/Technical-Writer-I-salary.html>

Our entry level positions will bring in fresh faces to the field of technical communication who can offer new perspectives as well as schooled learning; either from experience, education, or a combination of the two. We should attract a mix of applicants from a range of backgrounds and

staff out our department deliberately; while it may be tempting to bring on a lot of people quickly, having the right staff will translate to good, efficient work that we can be proud of.

The promotional and cross-training opportunities we will provide should be explained from the interview on. We will articulate the road map from entry to senior positions in a clear and consistent manner so that our employees know what to expect of us and what we expect of them. We will invest in our employees by providing them with opportunities to practice in and learn about multiple aspects of technical communication, such as video editing and graphic design.

The salary ranges reflect our long-term investment in our department and will no doubt assist in employee retention.

A Fully-Staffed Department

Director of Technical Communication (1)
Associate Director of Technical Communication (1)
Senior Technical Communicator (1)
Senior Technical Writer (2)
Senior Technical Communication Specialist (2)
Technical Writer (2)
Technical Communication Specialist (2)

The specialists and writers of all levels will pitch in with projects; our fully-staffed department will ensure that project schedules are kept, and quality is maintained at a high level.

Employee Recognition

Bonus Schedules

Employees will receive a 2% bonus in May of each year, and a 2% bonus in December of each year. The semi-annual bonus system will remind employees that we like to reward them throughout the year and will assist with vacation planning and to ensure that employees take all of their designated PTO.

Office Flexibility

We will offer a few benefits to employees to show that they have our trust in their discretion.

1. Work-from-home twice a week at employee's desire.
2. Early office closing on Fridays between Memorial Day and Labor Day, provided that performance does not decline.
3. Employees who deserve to be recognized for outstanding work will receive a "hall pass" that allows them to schedule a reasonable, short-notice (inside of Aardvark's typical two-week PTO scheduling restriction) day of PTO without it counting as a sick day.

Peer Recognition

1. Brag board in the department for employees to recognize their peers (or themselves!). Social lunch or meeting every two weeks to go through the brag board and recognize those nominated.
2. Discretionary work hours to explore a new skill, learn a new program, prepare for a conference presentation, etc.
3. Special project availability and assignment so that employees can round out their skill sets.

I appreciate your consideration of my proposals and look forward to hearing your constructive advice soon. I am excited to continue to develop this department and plan out its future.

Memorandum

TO: Bucky Ardmore, Gina Varcone, Rebba Kellog
FROM: Julia Warren, Manager, Aardvark Technical Communication Group
DATE: 7/5/2018
SUBJECT: *Midas* Help Site Development Estimation

We are excited to begin the development process of the user documentation for the *Midas* software. Unfortunately, largely due to poor user documentation, Aardvark's last personal investing program was returned at a rate of 40%. Users experienced frustration in the documentation instructing them how to set up and use the product, and therefore returned it to Aardvark at an alarming rate. It is in Aardvark's best interest, for the reputation of the company and to avoid incurring unnecessary costs, to prepare thorough and clear documentation so that users are empowered to get the most out of the *Midas* product with as little difficulty as possible.

As part of the user documentation for the *Midas* software, we will be preparing a 200-topic help system. This will be an easily searchable, module-based help system that will enable users to find specific and concise information about specific issues without having to leaf through a booklet or scroll through pages upon pages of documentation.

Appended in Appendix A is a full budget worksheet for the help system. Producing 200 topics at four hours per topic, considering variables such as access to subject matter experts, team cohesion issues, design software experience, and the instability of an in-development product, our hourly burdened rate, markup, and indirect expenses, the total development cost for the help system will be \$116,160.00. The worksheets at the end of this document provide a more detailed walkthrough of the calculation process.

The worksheet does not provide, however, an estimation of the costs saved due to the entire project's documentation, including the *getting started* booklet and the brochure aid. Altogether, we will see lower return rates than the previous software launch and fewer new calls to our support line after the launch. Reducing the previous return rate 30% (from 40% to 10%), based on the projected sales of 100,000 units per year, at \$100.00 price point per unit, will obviously have a large impact on the profitability of *Midas*. Additionally, there will be a significant avoidance of help center calls that average a cost to us at \$28 per call. Considering the impact of documentation reliability on our brand as a whole, all of these benefits add up to be well worth the development costs of the parts.

Memorandum

TO: Bucky Ardmore, Gina Varcone, Rebba Kellog
FROM: Julia Warren, Manager, Aardvark Technical Communication Group
DATE: 7/14/2018
SUBJECT: *Midas* User Documentation Project Proposal

Please find attached a transmittal of the project proposal for the *Midas* software user documentation, courtesy of the technical communication group.



MIDAS SOFTWARE USER DOCUMENTATION

PROJECT PROPOSAL

From the Aardvark Technical Communication Group

Julia Warren
Technical Communication Manager
julia@aardvark.net

AARDVARK TECHNICAL COMMUNICATION PROJECT PROPOSAL

Midas Software User Documentation

INTRODUCTORY SUMMARY

The Aardvark Technical Communication group submits this proposal for services for the *Midas* software user documentation. We are excited to commence our first entire, ground-up software undertaking. Our personal investing software will set the standard in the market, and with documentation that empowers rather than frustrates our users, we will see that the long-term investment of technical communication is well worth it.

While Aardvark has never professionally and deliberately developed user documentation for our software or hardware products, the products themselves are still considered gold standard in industry. Frustrations experienced by our users are largely unavoidable. For this reason, we propose three deliverables to accompany the launch of the *Midas* personal investing software: a “getting started” booklet, an online modular help system, and a job aid brochure.

This proposal details the timeline and budget for the development of these documents. Technical documentation is certainly an investment, however, avoiding the return rates and potential calls as Aardvark experienced upon the launch of the previous investment software will be well worth it, as demonstrated below. The documentation more than pays for itself if the product return rate is reduced from 40% to 10%.

SITUATION

We find ourselves uniquely positioned to, for the first time in Aardvark history, deliberately and iteratively develop user documentation for one of Aardvark’s outstanding software products. This section defines the objectives of the proposed project as well as the benefits for adopting the project as proposed.

Objectives

- Develop a job aid brochure with quick-hit steps for users to easily complete common tasks.
- Develop a “getting started” booklet of approximately 50 pages detailing the set-up process and in-depth step-by-step instructions to complete tasks.
- Develop an online help system of 200 modules that is easily navigable and updateable.

Benefits

- Reduce the previous return rate of 40% for the previous investment software launch drastically as users will be able to walk through the start-up process using the booklet.
- Reduce call load on help center by helping users problem-solve on their own.
- Accommodate unanticipated but necessary help topics by employing an easily modular help system.

Bottom Line

- Aardvark has decided to launch a technical communication group for a reason. We are excited to show the potential benefits of a fully integrated, start-to-finish documentation development process.

PRICING

Pricing calculation worksheets for the deliverables are provided as an appendix. Please see the appendix for assumptions regarding pay, burdened pay, variables, and markup.

| Deliverables | Price |
|---|------------------------|
| Job Aid Brochure | \$1,161.00 |
| "Getting Started" Booklet | \$29,020.00 |
| Online Help System | \$116,160.00 |
| Project total | \$ 146,341.00 |
| Extraneous expenses | Price |
| User testing (\$1,000 per, times two) | \$2,000.00 |
| Cost avoidances | |
| Avoided returns (40% previous-10% anticipated=30% returns avoided, assuming 100,000 units sold at \$100 retail) | \$-3,000,000.00 |
| Avoided help center calls (40,000 previous calls-10,000 new calls=30,000 calls avoided, assuming 1 call per product return) | \$-840,000.00 |
| Total | \$-3,691,659.00 |

OUR PROPOSAL

Organizing, drafting, and testing 200 modules, 50 pages, and one job aid brochure within a six-month timespan alongside product development will be no small feat. This section outlines our rationale for the deliverable types we have chosen, the resources and assumptions we will work with, the analyses that will be necessary to development of effective documentation, and the project schedule itself, listing deadlines for each deliverable's draft, final, and reviews.

Rationale for Deliverables

- “Getting started” booklet: this booklet will be the first documentation that our users pick up during the process of installing and setting up the *Midas* software. In order to make a good first impression, a tangible, paper copy will be provided, so that users enjoy the ability to flip through pages and quickly locate information, while still being able to see their software on the screen.
- Job aid brochure: the brochure form of the job aid enables users to conveniently glance at a piece of paper and receive brief instructions for common tasks, without having to search through a booklet of information. After initial software set-up, users will be able to keep this document, rather than a booklet of information, convenient to their computer.
- Online help system: the online help system will essentially function in place of our help call center, saving frustration for both the user (who cannot get a hold of us 24/7 and might have difficulty describing an issue) and for Aardvark (in terms of the high average per-call costs). This help system will contain FAQ, troubleshooting, tips, and more. Additionally, the online hosting enables us to continually update the help system if unanticipated questions arise, or if some user queries become obsolete with software updates.

Resources

The below staff and data should be convenient to the technical communication group when needed and will be the primary resources for the documentation development process.

- Staff technical communicators
- Subject matter experts (SME)
- Help center staff and reporting

Assumptions

- Audience analysis will be performed by the software development team and shared with the technical communication team.
- SME will respond to questions and requests for demonstration within one business day; demonstrations will be carried out within three business days.
- Documentation will only be produced in English for the current project.
- Software updates will be shared with the technical communication team in order to prepare documentation for each update.
- All drafting will be done on a cloud-based program.
- Draft reviews and comments will be returned in a timely manner.

Audience and Task Analyses

- Audience analysis will be useful in targeting the language used in our documentation to the generic user of the *Midas* software.
- Task analyses will be performed after the alpha and beta launches of the *Midas* software in order to optimize the user documentation at each iteration of the software.

Overall Schedule

Dates are subject to input and change.

| Task | Deadline |
|---|--------------|
| Project commences | Jan 1, 2019 |
| User profile report | Jan 14, 2019 |
| Task analysis report | Jan 21, 2019 |
| <i>Help system</i> rough modules outline | Jan 28, 2019 |
| <i>Help system</i> hard modules outline | Apr 1, 2019 |
| <i>Getting started booklet</i> rough outline | Apr 1, 2019 |
| Alpha code launches | Apr 1, 2019 |
| Usability testing, round one | Apr 15, 2019 |
| <i>Getting started booklet</i> draft due for review | Apr 22, 2019 |
| <i>Help system</i> final draft | May 15, 2019 |
| <i>Getting started booklet</i> review return | May 15, 2019 |
| Beta code launches | May 15, 2019 |
| Usability testing, round two | May 22, 2019 |
| <i>Job aid</i> draft due for review | May 29, 2019 |
| <i>Job aid</i> draft review return | Jun 10, 2019 |
| Revisions done and deliverables in hand | July 1, 2019 |

IMPLEMENTATION

This section outlines the roles of actors in the documentation development process, the general logistics and rationale behind the documentation evaluation philosophy, and specifics regarding the maintenance of the Midas documentation after product launch. The following considerations regarding project implementation will be taken into account:

Roles and Responsibilities

- SME will have availability of a minimum of 8 hours per week and keep technical communication updated regarding changes to software and schedules.
- Meeting will be scheduled by the technical communication team at the convenience of the developers.
- Technical communication is responsible for orchestrating task analysis and usability testing.

Evaluation

- Usability testing will be conducted twice during the development process to ensure that we meet the needs of the people using our documentation.
- Validation testing will be conducted at each draft of the online help system to ensure that the system functions smoothly at product launch.

Maintenance

- A process for keeping the help system updated will be defined and tested before product launch.
- Aardvark will follow-up through email with users a month after their initial purchase date to inquire how *Midas'* documentation could be improved.
- The help call center will keep technical communication apprised of patterns in queries regarding the product's documentation.
- Technical communication will be involved in drafting explanatory text for software updates and any potential new features added after launch.

CONCLUSION

Aardvark technical communication has brought on three experienced staff who are ready to get rolling. We in the technical communication group feel confident that you will agree that the project, as proposed, is appropriate for the scope, timeline, and most important, reputation of the *Midas* software.

Appendix

A. Technical Communication Management Worksheet

Technical Communication Estimation

Project Name: Midas Launch: **Help System**

Estimate Date: **7/5/2018**

Estimated By: **Julia Warren**

1. Technical Communication Deliverable Type: **Help system**
2. Number of units (pages, screens, messages, etc.): **200** topics
3. Hours per unit to develop this type: **four hours per unit**, per Dicks table 3.4
4. Multiply line 2 (# of units) by line 3 (hours per unit) and enter result here: **800** total hours
5. Enter the hourly cost to develop this type of unit: **\$100** per hour
6. Multiply line 4 times by line 5 and enter result here: **\$80,000**
7. Enter variables, ranges, and range for this project: (see page 134 for possible variables)

| <i>Variable</i> | <i>Variable Range</i> | <i>This Project</i> |
|-----------------------------------|-----------------------|---------------------|
| Access to developers (SME) | 75-110% | 100% |
| Team cohesion | 90-110% | 110% |
| Design software experience | 85-120% | 100% |
| Product stability | 90-110% | 110% |

8. Multiply "This Project" numbers times by each other and enter result: **1.21**
9. Multiply line 6 by line 8 and enter the result here: **\$96,800**
10. Enter your markup percentage here: **20%**
11. Multiply line 9 by line 10 and enter the result here: **\$19,360** markup amount
12. Add line 9 and line 11 and enter the result here: **\$116,160** direct expenses plus markup
13. Enter estimated expenses (indirect costs) here: **\$0**

Add lines 12 and 13 for Total TC Development Cost (DC) = **\$116,160**

B. Technical Communication Management Worksheet

Technical Communication Estimation

Project Name: Midas Launch: **Job aid brochure**

Estimate Date: **7/5/2018**

Estimated By: **Julia Warren**

1. Technical Communication Deliverable Type: **Brochure**
2. Number of units (pages, screens, messages, etc.): **2 pages**
3. Hours per unit to develop this type: **four hours per page**, per Dicks table 3.4
4. Multiply line 2 (**# of units**) by line 3 (**hours per unit**) and enter result here: **8** total hours
5. Enter the hourly cost to develop this type of unit: **\$100** per hour
6. Multiply line 4 times by line 5 and enter result here: **\$800**
7. Enter variables, ranges, and range for this project: (see page 134 for possible variables)

| <i>Variable</i> | <i>Variable Range</i> | <i>This Project</i> |
|-----------------------------------|-----------------------|---------------------|
| Access to developers (SME) | 75-110% | 100% |
| Team cohesion | 90-110% | 110% |
| Design software experience | 85-120% | 100% |
| Product stability | 90-110% | 110% |

8. Multiply "This Project" numbers times by each other and enter result: **1.21**
9. Multiply line 6 by line 8 and enter the result here: **\$968.00**
10. Enter your markup percentage here: **20%**
11. Multiply line 9 by line 10 and enter the result here: **\$193.60** markup amount
12. Add line 9 and line 11 and enter the result here: **\$1,161.60** direct expenses plus markup
13. Enter estimated expenses (indirect costs) here: **\$0** expense

Add lines 12 and 13 for Total TC Development Cost (DC) = **\$1,161.60**

C. Technical Communication Management Worksheet

Technical Communication Estimation

Project Name: Midas Launch: **Getting started document**

Estimate Date: **7/5/2018**

Estimated By: **Julia Warren**

1. Technical Communication Deliverable Type: **Paper document**
2. Number of units (pages, screens, messages, etc.): **50 pages**
3. Hours per unit to develop this type: **four hours per unit**, per Dicks table 3.4
4. Multiply line 2 (**# of units**) by line 3 (**hours per unit**) and enter result here: **200** total hours
5. Enter the hourly cost to develop this type of unit: **\$100** per hour
6. Multiply line 4 times by line 5 and enter result here: **\$20,000**
7. Enter variables, ranges, and range for this project: (see page 134 for possible variables)

| <i>Variable</i> | <i>Variable Range</i> | <i>This Project</i> |
|-----------------------------------|-----------------------|---------------------|
| Access to developers (SME) | 75-110% | 100% |
| Team cohesion | 90-110% | 110% |
| Design software experience | 85-120% | 100% |
| Product stability | 90-110% | 110% |

8. Multiply "This Project" numbers times by each other and enter result: **1.21**
9. Multiply line 6 by line 8 and enter the result here: **\$24,200**
10. Enter your markup percentage here: **20%**
11. Multiply line 9 by line 10 and enter the result here: **\$4,840** markup amount
12. Add line 9 and line 11 and enter the result here: **\$29,040** direct expenses plus markup
13. Enter estimated expenses (indirect costs) here: **\$0** expense

Add lines 12 and 13 for Total TC Development Cost (DC) = **\$29,040**