

Developing a Technical Documentation Strategy

Challenge

A large public utility that provides electricity and gas to millions of mid-western residential and business customers was looking for a better solution for managing, reviewing and updating thousands of pages of Standards information and graphics. Employees were using a combination of outdated authoring tools and large PDFs to maintain and distribute information that, in some cases, was decades old.

There were a number of issues with the documents and processes:

- Processes for updating and reviewing the content were labor-intensive.
- Software tools had limited capabilities for managing and linking large numbers of documents.
- Information could not be targeted to the specific needs of each user group.
- Field personnel were using paper copies of the manuals which were frequently out of date.

After interviewing several technical documentation firms, this utility decided to engage InfoPros' Consulting Services team to analyze the current environment and recommend a plan of action.

Approach

InfoPros Consulting Services used a five-prong approach to understanding the utility's goals and environment:

- **Audience Analysis** – Assess the various user groups that need the information to ensure it is communicated at the appropriate level and in an effective format. Understand the issues end-users have in using and maintaining the current manuals.
- **Content Analysis** – Evaluate the current content to identify opportunities for making it easier and more efficient to use and update.
- **Process Analysis** – Driven by efficiency improvements determined during content analysis, design new workflows for the delivery, use and maintenance of the documentation suite.
- **Tools Analysis** - Ascertain the best software tools and platform to be used for creating, maintaining, and storing the documentation.
- **Documentation Delivery Evaluation** – Devise ways to deliver the content according to end-user needs (such as printable format [PDF], online from a browser, and via mobile devices) as well as content, process and tool recommendations.

InfoPros Consulting Services performed the above by reviewing all of the existing content and supporting process documentation, while interviewing those who were updating and maintaining the content. Consulting Services then compared its findings with known best practices for large, frequently-updated documentation sets.

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Locations:
California
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Results

At the conclusion of the project, Consulting Services delivered a Recommendations Report that included the following:

- Interview and survey findings
- Description of potential end-user experience improvements
- Analysis of content reuse for the three manuals
- Recommendations for authoring, maintenance and delivery tools
- Swim lanes for the documentation development process
- Recommendations for a new change request process
- Strategy for moving content to the new tools and establishing the new workflows
- Calculations on long-term cost savings associated with the recommendations

The report provided the Standards team with the technical details and return-on-investment figures to present to their upper management for implementing changes to their documentation processes and tools.

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InfoPros Consulting Services is a team of solution architects who specialize in analyzing and solving the business and production challenges companies face regarding technical documentation and training. If you need help developing your documentation strategy or just need some help getting started, please [contact us](#).