northbay news

In This Issue

Identity Crisis: The Persona as a Tool for Formatting and Evaluating Information Design

John Dibs
President

At our November meeting, Bonni Graham of Manual Labour in San Diego presented a fascinating approach to defining a user audience. The subtitle of the talk gave a clue as to what was in store. Explained Bonni, by spending a mere two to four hours at the beginning stages of a documentation project on defining a persona, technical communicators can produce a valuable tool that guides the content and design, and keeps the documentation team focused.

"Sputter...I am a penguin. Hmmm, hurrumph...No, I am a **man**. *Oh, what's my persona?"*

News and Opportunities

John Dibs
President

Hey, what's that?

Happy New Year!

This article presents information on the state of the chapter.

We are in exiting and challenging times for technical communicators in the North Bay. On the membership-news front, we are currently at 99 members, and are likely to top the 100 mark soon. In November, together with the San Francisco chapter of the STC, we co-hosted Bonni Graham from San Diego, a milestone for the chapter in hosting a speaker from such a distance.

Late last year, chapter members Kurt Huget, Michael Simoni, Mark Weddle, and John Dibs attended a meeting with Carol Tremmel and Les Adler of Sonoma State University's Extended School of Education. Several other members were interested but could not attend the meeting. At the meeting we shared ideas about pursuing an STC

submitting articles and ads
We welcome articles, advertising, and news about meetings, workshops, and courses that pertain to technical communication. Please e-mail simple text to the editor at jdibs@earthlink.net.
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This Month's Meeting
Thursday, January 18, 2001

Process Mapping: A Tool for Making the Vague Visual
By Karen Widmer

In today's information-rich environment, plain English may not be enough. Process maps combine the strength of words with the power of a picture, making communication exponentially more effective.

Karen Widmer uses business modeling software to make flowchart-type diagrams of business processes. These diagrams help companies start up, break through, or improve performance.

Karen's solo consultative Performance Modeling Services has modeled and remodeled the business processes of diverse clients, including small businesses, nonprofits, and educational institutions. She sees process maps as both precursors to technical writing and useful graphics within technical documents.

Her maps chart such diverse things as
- a customer's experience
- a new employee orientation or training
- a production process
- an idea or a concept

*Dunno. What **is** that?*

Meeting Schedule

Location:	Parker Compumotor, 5500 Labath Dr., Rohnert Park	
Time:	5:30 - 6:30	Networking and Refreshments
	6:30 - 8:15	Introductions and Program
	8:15 - 8:30	More Conversation, Idea Swapping

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What's a Persona, Anyway?

A *persona* is a mini biography of a fictional user. It consists of details taken from marketing demographics for the product or service being documented, from friends, family, and coworkers, as well as from what is understood about the adult learner. Using these sources and some common sense about what the user is trying to accomplish, the writer or

A persona need not fit the description of any one real user, but rather should describe the goals of most users.

documentation team carefully defines a hypothetical user who is as free as possible from idiosyncrasies.

Precision, over accuracy, is critical when creating a persona. "An engineer with a B.S. degree" is not as precise as "a 29-year-old male mechanical engineer with a B.S. degree from Stanford in 1985." Bonni explained that it is not important that any one real user fit the description of the persona exactly, but rather that the persona describe the goals of most users. We need to be cautious about the filters that we use to assume things about our users. To illustrate this point, Bonni conveyed a joke about a trapper who had suspended a stove from the roof of his cabin. A psychologist, engineer, and theologian observing this phenomenon

each had their own lofty explanation of what motivated the trapper to suspend the stove in mid air. Finally, the trapper walked into the cabin, and explained his motivation: "Gee, I had a lot of wire, but not a lot of stovepipe."

Why are Personas Needed?

"Nobody opens [our] books to read our prose," explained Graham. In fact, only 12% of users (an optimistic estimate) will read the manual before they pick up the software. The other 88% will refer to the manual only when they need to do something and can only learn how to do that something by reading the manual. Understanding the goals of the user, then, is critical to planning and writing the documentation.
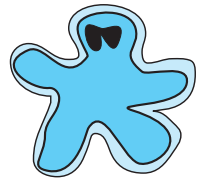
Personas are defined by the users' goals. Once we know who the users are and what they want to do, creating the persona becomes a lot easier. And once a persona is created, we can write to "someone" rather than to "everyone." In fact, the persona should be given a name, such as Bill Smith, rather than referred to as simply "the user."

If there is more than one target audience, as may often be the case, more than one persona will need to be created for each group of users. There could be, for example, novice, experienced, and expert user groups for the same product. Bonni cautioned, however, that if there are conflicting personas, only one should be selected for the documentation, and we should strive to satisfy the selected persona 100% rather than attempt to satisfy all of them. Indeed, in some cases having multiple personas will obviate the need for having more than one documentation deliverable.

Creating a Persona

In her practice at Manual Labour, a documentation consulting firm, Bonni delivers the persona along with the

documentation content specification, at the end of the information plan phase of each project. The persona must be signed off by the client along with the content specification. In this way, creating the persona is a meaningful task that gets done between the time the project starts and the first drafts are circulated. Clients often cannot see the value in this "black hole" period of time.

In many cases, engineers assume that documentation is written in the same way that they did their term papers in college: on midnight the night before they were

It's turning into something.

Having a persona as a deliverable during the planning stage reassures clients that there is something going on in the writing team.

due. Having the persona as a deliverable during this time reassures clients that there is something going on in the writing team. It can also help reduce the resentment that writers often experience when they start looking for information prior to delivering a rough draft. Once created, personas typically do not change unless new information about the user becomes known and agreed upon by

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the client and the writing team. In fact, armed with a well-defined persona, late information (as may result when a project manager attempts to initiate changes late in the game) can be protested if writers demonstrate how the new information will require an inordinate amount of time to rework the documentation.

Benefits of Personas

With a persona in hand, technical communications can sometimes help end the inevitable feature debates during product design meetings. When an engineer presents his or her newest and coolest feature find from the Web with only three weeks until product ship date, we can legitimately ask if the new feature fits the

The persona becomes a cast of characters. You don't have to like them. You just have to understand them.

persona that was agreed upon at project commencement. The persona is a powerful tool in keeping the documentation, as well as the project development team, focused on what the user needs.

Said Graham, "The persona gives you a cast of characters that becomes in effect a design taxonomy that gives you a way to defend your decisions specifically." Citing the persona can head off getting side tracked in fruitless discussion about choice of font or other design decisions that belong

to communicators, and not to the other members of the team. When we use the persona to respond to opinions, we establish ourselves as experts in our own right. With our skill set as technical communicators, we become known as equals in the development process, possessing skills and knowledge that other team members do not have. The persona provides a logic (and developers like logic!) for design decisions.
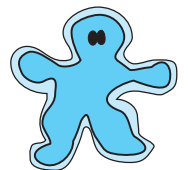
Creating Personas

The goal for creating a persona is to define the stereotypical, center base-line user. Some of the elements of the persona will need to be fictional and may be frivolous (how many children they have, for example). But if we avoid bringing in elements of "fringe" users (users whose circumstances or goals do

not typify the target population), the fleshing out of the persona will be easier.

Bonni cautioned about playing against types. If the target audience is marketing directors, and most marketing directors are male, the persona should be a male. "This is not the time for diversity training," she said. Idiosyncrasies will skew the usability of the persona. Another important tip is to have a picture or graphic that represents the persona.

Gathering demographics constitutes the start of the process of persona creation. There are three types of demographics: the one that marketing knows; the one you find through primary and secondary research, and the one you make up in the absence of further information. This last type of demographic data can sometimes be the only source available, and Bonni admits that on occasion she has had to base a persona entirely on fictional data. Avoid building an elastic persona that is merely a substitute for the generic "user." The persona must not be a "buyer persona" either. Let marketing worry about creating personas for buyers. If in doubt, make the persona be a person who is most likely to use the documentation, rather than a person who is most likely to buy the product. This approach may help resolve conflicts over the definition of the target customer.

Using the Persona

A persona may open the door for you to do direct user interaction as well, but be cautious. Upper management will not spend money on a problem that's presented with no solution, but they may spend money on a solution. If your product design team creates personas, use them, but in Bonni's experience, only one out of her roughly fifty historical clients had a persona already prepared and knew what they wanted from the start of the documentation project.

Once the persona is created and signed off by the client or development team, it becomes a source of reference and authority for design decisions that affect the documentation. If the documentation is planned with too much depth for the persona,

It's taking shape...

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it's Bill Smith (the name for the hypothetical persona) who won't need that much information. Documentation layout designs can be defined against the persona. Evaluate your index and

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If in doubt, make the persona a person who is most likely to use the documentation — rather than a person who is mostly likely to buy the product.

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hierarchy (headings or structure) against the persona. Are frequent cross references needed by the persona? If so, it's better to plan for them early, rather than late.

As one member of the audience astutely pointed out, the use of personas can make it *much* easier to come up with examples in the documentation. And as Bonni explained, the process of creating a persona facilitates contingency planning, which can be very important to the success of each project.

What about ROI (return on investment)? For every hour spent, Bonni estimates that two to three hours are saved in writing the draft. Most personas are about a page long, and can be written in bullet-list or paragraph format.

Decisions about documentation deliverables are informed by the persona you create. It is well worth the time and effort.

Ah ha! It's the persona!

Preemptive Project Planning

An STC Telephone Seminar

No one likes surprises, especially if those surprises mean more work. This presentation will teach you how to spot upcoming projects before they sneak up on you. You'll learn to prepare for these projects, avoid those nerve-wracking schedule crunches, and look like a hero in the process!

This presentation will show how to

- gather information on projects that are just beginning to coalesce, track them on your scheduling radar, and raise the warning signs to your coworkers;
- track ongoing projects using a simple spreadsheet;
- identify projects that aren't yet official (but will be soon...);
- share information within your group;
- plan for upcoming projects; and
- check your results.

As you master this new skill set, you'll also learn how to use your knowledge and to expand your ability to make accurate long-range forecasts.

When?

Wednesday, February 7, 2001
1:00–2:30 PM Eastern Standard Time

Cost

With a telephone seminar, the cost is per site, not per person.

U.S. sites: $125.00
Canadian sites: $140.00
Overseas sites: Please contact the STC office

*An additional $8.00 will be charged for registrations received less than five days before the seminar.

About the Speaker

John Hedtke is the award-winning author of twenty-one books. He has more than twenty years in the software business, seventeen years as a writer, and seven years as a technical publications manager. John has developed and written documentation and books for many leading software products and has received nineteen regional and international writing awards to date. A complete list of his books, articles, projects, and awards can be found at his Web site, www.hedtke.com.

Note: *For questions about the seminar, contact Sara Fulmer at (703) 522-4114 ext. 207 or sara@stc-va.org. For a copy of the registration form, e-mail a note to the editor at jdibs@earthlink.net.*

Resources About Personas

Bonni highly recommended *The Inmates are Running the Asylum,* by Alan Cooper. Chapter 9 is devoted to personas. Another source is *User and Task Analysis for Interface Design,* by Joann Hackos, which provides sample screening questions and contains an extensive bibliography. Other resources include *Human Factors for Technical Communicator,* by Mariana

Coe, and *Handbook of Usability Testing,* by Jeff Rubin.

Bonni promised to post the PowerPoint slides for this talk up on her Web site, **manuallabour.com**, and hoped to perfect her presentation to deliver it at the upcoming STC International Conference. She welcomed comments and criticism.

Spring Extension Courses at SSU

Editor's Note: The information below has been abbreviated. For the full version, along with links to details regarding cost and signing up for these workshops, visit http://www.sonoma.edu/ExEd/Text/Spring/tc.html on the Web.

Introduction to Technical Communication

Saturday, March 17, 9am–4pm
Instructor: Mark Weddle, Cisco Systems

This course introduces you to technical communications and defines the knowledge and skills needed to succeed in the field. It is intended for those who are considering employment in technical communications as well as for those already in the field seeking a broader understanding of their profession. Topics include the following:

• Overview of technical documentation process
• Types of documentation
• Audience and project analysis
• Gathering information
• Organization, design and layout of information
• Writing and editing
• Writing for electronic and print media
• Testing the usability of documentation
• Documentation production and distribution
• Tools of the technical communicator
• Employment trends and career opportunities
• Professional organizations

The class includes small group exercises and discussion. A panel of North Bay technical communicators will share their experiences and insights and answer questions from the class.

Researching and Analyzing Technical Information

Saturday, April 7, 9am–1pm
Instructor: Eunice Malley, Next Level Communications

Getting the correct information and writing it for the intended audience are major elements of creating a successful technical writing project. This course teaches you how to do the following:

• Identify and use information sources appropriately
• Deal with obstacles in gathering accurate information
• Understand the psychology of interviewing technical subject matter experts
• Analyze gathered information and glean from it what is useful for the reader
• Organize the information to be used so that it is most helpful to the reader

This course is intended for aspiring or beginning technical writers, or those technical writers who would like to learn new perspectives about the information research and analysis process.
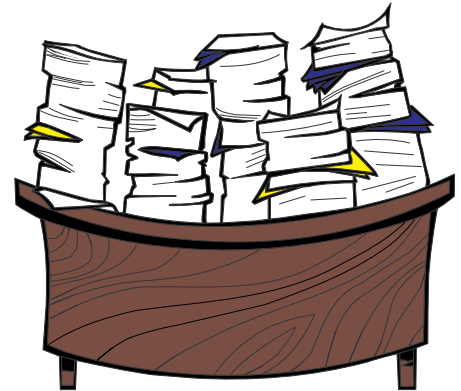
Introduction to Indexing

Saturday, April 28, 9am-1pm
Instructor: John Dibs, Alcatel USA

This workshop provides an introduction to the requirements and mechanics of indexing. The workshop addresses the following topics:

• Who should create an index
• Understanding indexing as part of a publication cycle
• Parts of a publication that are typically

A job for Dilbert: "Index these by tomorrow morning!"

indexed
• Types of indexes
• Indexing terminology
• The indexing process
• Format considerations
• Resources for learning indexing
• Tools for creating indexes

Indexes for technical and online material will be discussed but are not covered in depth. Participants will leave the workshop with an appreciation of the art and science of indexing and a specification list for analyzing an index. The workshop is appropriate for those interested in the field of indexing, as well as publication professionals who review indexes created by freelance or in-house indexers.

News and Opportunities
Continued from page 1

research grant to further the cause of education in technical communication in the North Bay. Between that meeting and the new year, a grant writer has been identified, and we hope to review a draft proposal in January. Representatives from both the School of Extended Education and Santa Rosa Junior College have shown keen interest in these developments.

Speaking of education, instructors and guest instructors are needed for workshops on topics in technical communications. These workshops are a great opportunity for experienced communicators to share their knowledge and interests. For more information and consideration, contact Carol Tremmel (carol.tremmel@sonoma.edu) at Sonoma State University's School of Extended Education and Annette Gooch (agooch@santarosa.edu) at Santa Rosa Junior College. You may also wish to speak with those who have taught workshops and courses in the recent past.

As indicated in *Spring Extension Courses at SSU* (page 6), three Saturday workshops will be offered this spring at the School of Extended Education. SRJC is offering three courses this spring: Technical Writing (English 84A), Intermediate Technical Writing (English 84B), and two sections of a Saturday workshop series on Technical Writing in the Workplace (English 348.1). Information about these courses can be found on the Santa Rosa Junior College Web site, santarosa.edu (click on the Academics: Schedule of Classes link, then navigate to the English department).

On the volunteer front, the NorthBay chapter is currently in need of a Membership Chair to fill a vacancy until June. Please contact me if you are interested. In addition, if you are interested in contributing your talents to the chapter Web site and newsletter, we are in need of a content review of the site, and are looking for qualified and available people to be involved in Web site design and maintenance, newsletter layout, and editing. Shelley Hoose has been the Webmaster and newsletter layout person and will be retiring from these duties after new officer elections.

Finally, our chapter Web site will be moving in the next few months.

Keep an eye out for announcements via e-mail and at the meetings. Many thanks to Vice President Barbara Herbert who has agreed to coordinate the move.

Many thanks to the volunteers who organize the meeting presenters and meeting place, contribute articles and talent to the newsletter, and maintain our Web site. Without volunteers the chapter would not be able to function.

Technical Writer

Next Level Communications
Rohnert Park
http://www.nlc.com

Description
Write hardware and software documentation for customers who use our state-of-the-art telecommunications products for video, data, and telephony services. The scope of work could range from documenting a product description, to installation and maintenance procedures, to provisioning software applications.

Qualifications
B.A. or B.S. in a related field and a minimum of 2 years technical writing experience. Ability to learn new hardware and software products and understand new technical material quickly. Ability to work effectively with engineers and developers and to meet tight deadlines in a fast-paced environment.

Working knowledge of FrameMaker, Word, Microsoft Windows NT, and Visio. Telecommunications experience is a plus.

Contacts
• Eunice Malley: emalley@nlc.com Phone: 707-584-6689
• Dena Sherick: dsherick@nlc.com Phone: 707-584-6652

We meet on the third
Thursday of each month

Our February Meeting

**Thursday,
February 15, 2001**

Topic:
*How to Create and
Maintain a Portfolio*
by Lance Gelein

Parker Compumotor
5500 Labath Drive
Rohnert Park
stc.org/region8/nbc/www/