

Metrics That Matter

Effectively Managing and Improving the Technical Publication Process

Executive Summary

Technical publications departments need to be able to base their business decisions and recommendations on measurable facts. While the metrics that matter most to technical publications managers and authors differ, the bottom line is that both groups want to ensure that the documentation created is user friendly and meets customer requirements.

Capturing and reporting these measurable, observable facts is a challenge many technical publications departments are now facing. Having the proper tools with built-in data analysis is imperative to managers and authors. Content management systems are an important tool, providing users with real-time visibility of the metrics that matter.

A new perspective for technical publications departments

Technical managers and authors need a new perspective.

In order to continue getting what they need for their departments, they need to be able to “sell” both the value of necessary improvements and the benefits of what they do. They need to be able to speak to company leaders in a way they understand; simply put, technical publications managers and authors need to be able to address the bottom line.

“Technical publications managers and authors need to be able to address the bottom line.”

When publications department leaders are able to *prove* that their ideas have merit and are based on fact, they will get the financial support, and the respect, they deserve.

What makes it so difficult to prove the worth of document production?

Publications departments face many challenges today. Products are growing more complex and yet their documentation needs to be created even more quickly. And, at this must all be accomplished within an ever-shrinking budget.

How can technical writing supervisors get the time and resources they need to fulfill their responsibilities? By showing the worth of what they are achieving. This is difficult, if not impossible without the right metrics. Writers need to first be able to measure for themselves that what they’re producing is effective—and then they need to be able to show this to their managers.

Data that authors and managers want

At a recent Inmedius sponsored interactive session with technical publications managers and authors at the *Content Management Strategies 2007 Conference*, Inmedius found that, when it came to measuring effectiveness of document production, each group had a few different kinds of concerns—and some very important areas of common concern.

During the session, thirty-five unique metrics that mattered to managers and authors were identified. Managers recognized 25 specific gauges, while authors identified 10 other types of metrics. Those quantifiable measurements could be grouped into categories.

“The biggest concern for author respondents was consumer feedback.”

Writers’ concerns fell into the following groups: review feedback, architecture, style, positive consumer experience and, by far the biggest category for author respondents was consumer feedback.

“Cost accounts for 32% of manager concerns.”

Managers’ concerns, on the other hand, fell into different categories. Four percent of management responses concerned time, flexibility, production or consumer feedback. Eight percent of their responses concerned quality and style. Throughput was a bigger concern for managers with 16% of responses falling into this group. But by far the biggest category for managers was cost, which accounted for 32% of responses.

Metrics for Managers

- **Cost**
 - » Cost per page
 - » Total document cost
 - » Translation costs
 - » Specific content creation cost
- **Throughput**
 - » Elapsed content development time
 - » Documents requested, in progress, & completed
- **Time**
 - » Meeting schedules
 - » Reduction in review cycles
- **Flexibility**
 - » Making changes late in the process
- **Utility**
 - » Content reusability
- **Consumer Feedback**
 - » Meets customer needs
- **Quality**
 - » Content accuracy
- **Style**
 - » Style guide adherence

Metrics that matter to managers

It is perhaps not surprising that managers identified cost—either on its own or as part of “cost and time” or “cost and risk” categories—as their main concern. And it is probably not completely shocking that cost was identified as a main concern in none of the responses given by writers. While this set of statistics is not surprising, it does go a long way in explaining why document production departments and company financial managers don’t always see eye to eye.

It is also interesting to note that in relation to cost, managers wanted to clearly see specific reductions which directly related to the way writers do their jobs. For example, managers wanted to know whether content was being completed within estimates, what the cost was per page and what the total cost (to create, manage, publish and deliver) was per deliverable. They also wanted to be able to track translation costs.

While these issues were not identified as concerns by any of the writers participating in the Inmedius session, the value in writers knowing the answers to these questions is obvious. If managers want to know how document production fits into a specific budget, if it’s being produced within time parameters and how much each chunk of content actually costs to produce, then writers who can respond with actual data to these concerns will be at an advantage.

Other concerns managers identified that authors should be prepared to address included flexibility (like the ability to make changes late in the process and still deliver on time) and utility (such as the ability of many employees to use the same content).

Throughput, with 16% of manager responses identifying it as a concern, is also a topic for writers to heed. Managers wanted to be able to see measures for elapsed time for content development. They also wanted to be able to clearly see the number of documents that had been requested, that were in progress and that had been completed. And, they’d like to see evidence that the number of review cycles is being reduced over time.

Metrics for Authors

- **Consumer Feedback**

- » Who is using content
- » Usefulness of information
- » Content readability
- » Helpdesk call frequency
- » Emotional reaction

- **Review Feedback**

- » Clarity
- » User-friendliness
- » Number and types of issues found

- **Architecture**

- » Smooth transitions
- » Customizable content

- **Style**

- » Consistency
- » Brand impression

Metrics that matter to authors

Like managers, writers wanted to be able to see and track efficiency—though the way they wanted to see this measured differed somewhat from what the managers wanted to see. Author responses to the Inmedius session were overwhelmingly about consumer feedback. Of five identified categories, fully 40% of writer responses fell into this category.

What kinds of feedback do writers most want from consumers? Well, first of all, they wanted to know who is using their content. And they wanted to be able to gather information about whether users found proffered information helpful (“Did this article meet your needs?”).

Writers also wanted to make sure their content was readable for users. And they wanted to know how often consumers called the Helpdesk. (One writer responder did point out that there could be “savings” in “Helpdesk call avoidance”—the only mention of cost in the authors’ responses.)

And, finally, regarding consumer feedback, writers wanted to be able to measure the “emotional reaction” consumers had to the content they’ve created.

Authors also wanted review feedback; they wanted to know whether their content was clear, user-friendly and “translatable” for consumers. And they wanted to be able to categorize both the number and type of issues found in the review feedback loop.

Writers were also concerned with the following issues regarding architecture: Is there a smooth link from content page to the sales process? Can content be customized to match a user’s profile?

Metrics that matter to both

While their approaches sometimes differed, both authors and managers were mainly concerned with one very important issue: Can the user effectively use the product? Both groups, for instance, were concerned about reducing the number of calls to the Helpdesk.

They both also wanted to see the product adhering to a consistent style. (Writers were concerned with finding out about consumers’ “brand impression,” and managers wanted to see evidence of style guide adherence and best practices.)

Perhaps the most significant common concern the two groups shared was that they both wanted the product to be as user-friendly as possible. (“Do customers actually use your content?” is how one manager phrased it.) For that is, after all, the most desired end result from each group’s perspective. Authors want to know they’ve created content that is useful and usable, and managers want to know their product is sound.

Key Metrics

- How many documents are being created per hour, day, week, month, or year?
- How many pieces of content have been reused?
- How much does it cost to create each page, each document?
- How many work hours did it take to create a document or piece of content?
- How many documents are in review?
- Who completed each piece of content?
- How many documents need to be translated?
- What help topics have been visited by users?
- Which content pieces are behind, ahead, or on schedule?

Bringing the invisible to light

How can all these concerns of both writers and managers be addressed? Through appropriate quantitative gauges, and metrics that measure concerns that matter to both. Without the proper facts, authors and managers will continue to wonder whether content produced is effective. These concerns will remain part of a great unknown, and so decisions about resource allocation will be based on something besides the actual effectiveness of what the technical publications department is achieving.

With proper metrics, these unknowns become *known*. Questions can be matched with answers, and what had been previously invisible begins to take shape. Writers can answer their own questions about architecture and ease of use—and can address management questions about cost and time.

With appropriate, measurable facts the metadata that is essential for both writers and managers becomes easily accessible. These metrics will provide actionable data that decision-makers can use.

Capturing measurable, observable data

Realizing that you need quantitative metrics is one thing, but obtaining the means to capture and report these gauges is a difficult problem for many. An important factor for today's managers and authors is having effective tools to gather and report on real metrics that matter. The days of manually tracking measurements using Microsoft Excel spreadsheets and Word documents are in the past. Technical publications departments need sophisticated systems to effectively manage the content and products they create. With the proper software solutions, managers and authors can base business decisions on observable, measurable facts captured via a formal and repeatable process.

Content management systems can automatically record and report on key metrics. Having real-time visibility into the technical publications department's people, processes, and projects gives managers and writers the ability to increase document quality and make informed business decisions based on concrete data. **After the fact analysis of data is doomed to fail. Metrics need to be built into the system rather than addressed as an afterthought.**


A tool for professionally managing content

Inmedius® Horizon™ facilitates the professional management of content, delivering the tools and information to efficiently manage a technical publications department. The powerful combination of a flexible Library system, with business intelligence delivered through a unique Dashboard approach, provides complete command over information assets. Through its tight integration with both Microsoft Project and Excel, along with its easy-to-use, flexible structure, Horizon gives both managers and authors the ability to collect and disseminate the metrics that matter most.


To learn more about how Inmedius Horizon can help to maximize the information assets of your organization, contact us today. Call for a product demonstration, or visit www.InmediusHorizon.com to view eight dynamic, one minute feature demos.

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Horizon's Dashboard Command Center

About Inmedius

Inmedius is a global leader in providing technical publication lifecycle solutions that capture, create, manage and deploy technical information. Integrating those information assets within business processes, using proven and innovative techniques, is an Inmedius hallmark. Providing lifecycle solutions to commercial, aerospace, defense and technical publications departments worldwide, Inmedius enables its clients to share an unprecedented level of productivity and efficiency – empowering every corner of the organization. Easy to implement, maintain, and use, Inmedius' fully integrated COTS software solutions make every facet of a project possible throughout its entire lifecycle.

