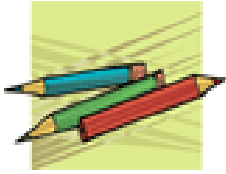# Technical Documentation Teams:
Industry Best Practices

A Whitepaper
by

Dalton Hooper

July 8, 2005

Table Of Contents

What is a Best Practice?

According to *About.com*, "a best practice is a process or procedure that consistently produces superior results."

Gateway.org defines best practice as "the processes, practices, or systems identified in public and private organizations that performed exceptionally well and are widely recognized as improving an organization's performance and efficiency in specific areas."

Lastly, *pemcocorp.com* defines best practice as "…a technique or methodology that, based upon experience and research, has proven to reliably lead to a desired result."

Best Practices for Technical Documentation Teams

No official list

Currently, there are no "official" industry best practices defined for IT technical documentation teams. This lack of a defined class of excellence is due in no small part to the fact that the value of technical documentation, as well as the technical writers who produce it, is nearly impossible to quantify. As a result, there are practically no metrics available to prove a direct correlation between technical documentation methodology and ROI. The value is, for the most part, anecdotal or perceived. ("The Help desk calls went down after we revised our user documentation, so the reason for fewer calls must be due to the documentation changes.").

In the meantime

In the absence of established best practices, we can make a reasonably assured attempt at creating one by looking at *common* practices among successful documentation organizations. If a particular way of doing things is shared among several successful groups, it is logical to assume that practice as a *best* practice – at least, until an "official" one comes along.

Research

Common practices identified

During the Fall of 2004, I conducted numerous interviews with documentation managers from various disparate companies around the country. In order to track the information gleaned from these interviews into some organized form, I developed a standard set of eleven yes/no questions that I asked each interviewee.

1. Do you have a centralized documentation group? (Yes 93%)

2. Do you have a segregated documentation budget? (Yes 64%)

3. Do you manage a separate project plan for documentation? (Yes 64%)

4. Is your documentation budget zero-based? (Yes 29%)

5. Does your documentation team typically use Contractors? (Yes 29%)

6. Do you, as Documentation Manager, report to an executive? (Yes 100%)

7. Does your documentation group publish standards and styles? (Yes 93%)

8. Do you, as Documentation Manager, participate in establishing your documentation budgets? (Yes 50%)

9. Do you, as Documentation Manager, typically have visibility to your future projects or work? (Yes 100%)

10. Does your documentation budget separate expense from capital dollars? (Yes 21%)

11. Have you established metrics for measuring the value of your documentation? (Yes 50%)

Research (cont'd)

Recommended practices collected

By asking the eleven questions stated above, I was able to determine *common* practices, but not necessarily *best* practices. Therefore, in each interview, I also asked each interviewee which practices they felt were not working for them and would change if given the opportunity. The following represents those responses:

1. Should you have a centralized documentation group? (Yes 100%)

2. Should you have a segregated documentation budget? (Yes 79%)

3. Should you manage a separate project plan for documentation? (Yes 93%)

4. Should your documentation budget be zero-based? (Yes 36%)

5. Should your documentation team typically use Contractors? (Yes 29%)

6. Should you, as Documentation Manager, report to an executive? (Yes 100%)

7. Should your documentation group publish standards and styles? (Yes 100%)

8. Should you, as Documentation Manager, participate in establishing your documentation budgets? (Yes 79%)

9. Should you, as Documentation Manager, typically have visibility to your future projects or work? (Yes 100%)

10. Should your documentation budget separate expense from capital dollars? (Yes 43%)

11. Should you establish metrics for measuring the value of your documentation? (Yes 79%)

Analysis

Best practices conclusions reached

Some of the documentation managers interviewed considered their teams successful and indicated they would not change any of their current practices, if given the opportunity. Other managers, however, named 1 – 2 practices they felt needed changing in order to help them become successful.

It is interesting to note that when a manager indicated a practice he/she wanted to change, it invariably was a practice in which they were currently out of sync with the self-described successful organizations. We can surmise, therefore, that of the eleven practices cited, certain of them are clearly considered to be *best*:

✓ **There should be a centralized documentation group, rather than having technical writers as members of development groups.** (Yes 100%)

✓ **There should be a separate project plan for documentation efforts, rather than documentation tasks being part of a larger development plan.** (Yes 93%)

✓ **The documentation manager should report to an executive-level manager.** (Yes 100%)

✓ **The documentation group should publish the standards and styles for the organization's documents.** (Yes 100%)

✓ **The documentation manager should be afforded visibility to upcoming work.** (Yes 100%)

Runners up

The following practices are also worth considering, with 79% of the interviewees recommending them:

✓ Documentation work should be funded separately from other development efforts.

✓ The documentation manager should participate in establishing the documentation budget(s).

✓ Metrics should be established for measuring the value of the technical documentation.