As a professional technical communicator, have you used template-based (structured) approaches to writing?

- Yes
- No
- I don't know what you're talking about

Instructions

1. Find your half of the room.
2. Find a group of 3 to 5 people to work with.
3. Discuss the question assigned to your half of the room.

Suggestion: Try to find people who answered the last question in a way that differed from your response.

State why templates are useful for professional technical communicators

State why templates are not useful for professional technical communicators
Agenda

- About forms
- The research underlying this
- Eleven issues arising in the research that benefit from your attention

Example of Template-Based Materials

Probably written by different authors in different organizations
Another Example of Template-Based Materials

Probably written by the same author or co-workers

Another Example
Intended for Facilitate Work by Less Qualified Author

The academic literature refers to forms as genres

- Categorization
- Defined by:
  - Conventions
  - Environments that use it

Genres offer opportunities and challenges

- Opportunities
  - Guide writing
  - Aid learning
  - Promote entry into communities
- Challenges
  - Universalist pronouncements
  - Contextualized realities
In our field, promote genres to promote consistency

<table>
<thead>
<tr>
<th>Style guidelines</th>
<th>Structured writing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning objects (*)</td>
<td>Templates</td>
</tr>
<tr>
<td>XML / DITA</td>
<td>Standards</td>
</tr>
<tr>
<td>Information Mapping®</td>
<td></td>
</tr>
</tbody>
</table>

But these efforts often fail to gain traction in the manner intended.

The Research Underlying This

- 3 genres
  - FAQs
  - Guided tours
  - Help
- 11 sites
- Each example studied three ways each:
  - Discourse
  - Design
  - Usability
1. Because implementing templates costs, make sure they offer a benefit.

- Costs
  - Design
  - Testing
  - Validation
  - Coordination
  - Training
  - Coding

Potential benefits

- Enable SMEs to create their own content with limited writing and authoring skill
- Simplify production
- Reuse parts or all of the content
- Ensure a consistent user experience
- Ensure a consistent brand experience

2. Remember, the content in the templates ultimately has an end use.

<table>
<thead>
<tr>
<th>Inform</th>
<th>Instruct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market</td>
<td>Report</td>
</tr>
</tbody>
</table>
### Group Activity

**Instructions**
1. Find your half of the room.
2. Find a group of 3 to 5 people to work with.
   
   **Suggestion**: Try to work with a different group of people than the last time.
3. Discuss the question assigned to your half of the room.

<table>
<thead>
<tr>
<th>What should be encoded in the template?</th>
<th>How can templates be integrated into a work process?</th>
</tr>
</thead>
</table>

### Activity

3. Before developing it, determine what the template should codify.

- Look?
- Content?
- Brand?
- Structure?
- Interaction?
- All of the above?

4. Note that templates reflect the preferences of the lead designer.

- Could be professional preferences:
  - Graphic designer?
  - Instructional designer?
  - Information designer?
- Could be corporate preferences:
  - Help
  - FAQs
5. To ensure that authors develop familiarity with the logic, document that.

- Don’t rely on institutional memory
- Use:
  - Style guides
  - Comments in the template

6. Validity of the template reflects the extensive ness of the testing.

- With the authoring software?
- With the branding police?
- With SMEs and similar stakeholders?
- With users?

7. Plan on integrating templates into your work processes.

- For creating content
- For reducing design and development time
- For automating workflow
- To ensure content “expires” when it loses its “freshness”
8. Within forms, organizations attempt innovation with varying satisfaction.

- Automating Q&A process in FAQs (bridging help and FAQs)
- Letting users change the structure of guided tours
- Linking to a web page rather than a help file during when providing user assistance
- Using statistical analysis to determine what to document versus the anticipation method

9. Determine how you will ensure compliance with the template.

- Automated checking
- Human checking

10. Refurbish content that uses "stale" templates.

EXP DATE 01/31/11
Recognize that template-based design could impact work opportunities.

- **Upsides**
  - We focus on meaningful content
  - We design the templates

- **Downside**
  - Others design the templates
  - DIY

**Take-Aways**

Name one or more insights about template-based writing that you've acquired through this session.