

Following Form: Eleven Real World Insights into Template-Based Writing



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Opening Question

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

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 find people who answered the last question in a way that differed from your response.	
3. Discuss the question assigned to your half of the room.	
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		
	Style guidelines	Structured writing
	Learning objects (*)	Templates
	XML / DITA	Standards
	Information Mapping®	

But these efforts often fail to gain traction in the manner intended.	
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| The Research Underlying This | <ul style="list-style-type: none">▪ 3 genres<ul style="list-style-type: none">- FAQs- Guided tours- Help▪ 11 sites▪ Each example studied three ways each:<ul style="list-style-type: none">- 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.

 Inform	 Instruct
 Market	 Report

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.

What should be encoded in the template?	How can templates be integrated into a work process?
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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.	<ul style="list-style-type: none">▪ Don't rely on institutional memory▪ Use:<ul style="list-style-type: none">– Style guides– Comments in the template
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6. Validity of the template reflects the extensiveness of the testing.	<ul style="list-style-type: none">▪ With the authoring software?▪ With the branding police?▪ With SMEs and similar stakeholders?▪ With users?
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7. Plan on integrating templates into your work processes.	<ul style="list-style-type: none">▪ For creating content▪ For reducing design and development time▪ For automating workflow▪ To ensure content “expires” when it loses its “freshness”
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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.

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<p>11. Recognize that template- based design could impact work opportu- nities.</p>	<ul style="list-style-type: none">▪ Upsides<ul style="list-style-type: none">- We focus on meaningful content- We design the templates▪ Downside<ul style="list-style-type: none">- Others design the templates- DIY
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<p>Take- Aways</p>	<p>Name one or more insights about template-based writing that you've acquired through this session.</p> 
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