

This portfolio contains the goals and tasks of a Technical Documentation Department, and the necessities needed for it to be successful.

# TechDoc Department Portfolio

Creating and Shaping a New  
Department

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## Table of Contents

What having a TechDoc Department Means for the Company.....	2
Goals .....	2
Objectives .....	2
Conclusion.....	3
Recommended Positions .....	4
Recommended Compensation Plan.....	5
Pay Scales.....	5
Reward System .....	5
Revision History .....	7
Contact Information.....	7
Approved By.....	7
Project Overview.....	8
Description of the Larger Project.....	8
Project vision and goals .....	8
Project scope.....	8
Project schedule.....	8
Project budget.....	8
Description of the customer for the product and the information .....	8
Usability requirements.....	8
Information Development .....	9
Information-development project vision.....	9
Project Schedule .....	9
Project budget.....	9
Information-development project scope.....	9
Roles and Responsibilities of the project team .....	10
Project dependencies and Risks.....	12
Project assumptions .....	12
Risk Analysis .....	12
Dependencies Calculation.....	12
Project total hours and costs .....	12
Project resource requirements .....	12

# What having a TechDoc Department Means for the Company

As a new department at Aardvark, I would like to take this chance to explain in detail what this department will do and how it will benefit the company. Technical Communicators are a fairly new idea, but one that can bring a lot

I understand that programmers and engineers don't think that technical communicators understand their job. That's partly true, but it's my plan and hope that my future team and I will be able to gain the confidence of the engineering and programming team by learning from and collaborating with them to provide accurate and concise documentation.

The growth of the TechDoc department may be slow to start as I establish best practices and grow my team. Within the next two to four years, I will successfully create a team that works cohesively amongst themselves and within the company as a whole.

The following are my goals and objectives of how I plan to manage the TechDoc department and where I see the department evolving.

## Goals

- Establish a style guide that all technical communicators and ideally others adhere to
- Provide effective documentation that decreases support needs.
- Establish which documents the customers find most effective
- Prepare and create documents in an efficient and timely manner
- Create a diverse TechDoc team

## Objectives

- Through collaboration with a member of every team, I will design a style guide that works for everyone
  - To begin, I (or my team) will design a few possible options for the style guides by evaluating previous documentation created at Aardvark, engaging experience from previous organizations and
  - From there, I will elicit opinions of likes and dislikes for each option from top members of each department. Feedback is encouraged and considered, but ultimately, my department will design the final style guide
    - Changes are encouraged
  - After collaborating, a final style guide will be established for each department to use and follow to allow for cohesiveness with all documents created at Aardvark

- Determining if documentation is effective will be established by administering customer surveys quarterly to check for customer satisfaction
  - These surveys will differ each quarter to determine if changes are being made properly, to the correct documents, in the right way
  - A 90% positive customer satisfaction rate will be achieved within the first six months
- Through surveys, customers will also be asked to rate the documents according to their likelihood to use each type of document
  - The results will be evaluated and anything less than a 65% usage rate will be catalogued and accessible and no longer updated
- Projects will be accepted and planned based on the cost and priority
  - Projects/documents that customers express concern about or strongly ask for will take precedence
  - Each project will be assigned an hour estimate for completion of the projects
    - Projects will be also be prioritized on the length of time it will take to complete
- The focus when finding members for my team will be experience and enthusiasm
  - Current and past experience will have an effect on my decisions
    - Members with experience in other areas (engineering, programming, support, etc.) would be beneficial
  - People with experience is good and needed as they would have invaluable knowledge on what works and what doesn't in terms of documents, I would like at least one member that demonstrates enthusiasm and new creative ideas
  - A training plan will be developed and provided to all new team members to become acquainted with the software they will be documenting
- Meet with management to determine the budget for team and projects
  - If I will be managing my own budget for the TechDoc department, I will work with upper management to ensure the budget is utilized correctly and in line with the organization's policy

## Conclusion

This is my preliminary plan for managing the new TechDoc team and will evolve as the team evolves. I will keep everyone up-to-date on any changes to the plan. My first and main focus is the customers. The customers should be happy and satisfied with the documentation we are delivering. The information they seek should be easy to find and easy to understand. To best deliver that, I need to understand their needs and what we already provide for their use.

With the encouragement of management, other team members and my team members, our ultimate goal is to provide efficient and effective documentation in a timely manner that encourages the customer's to use the documentation, and lowering Support calls and time.

# Memorandum

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**To:** Human Resources  
**CC:** Dan Chu  
**From:** Jennifer Kaltenbach  
**Date:** 4/1/2014  
**Re:** Technical Document Department Positions and Compensation Plan

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## Recommended Positions

I am excited to start the interviewing and hiring process and feel confident that I can create a team that will work well together and benefit from each other's strengths.

To begin, I envision a team of five people, including myself. We should plan to hire two technical writers, one advanced technical writer/editor, and, if the budget allows, a graphics specialist.

### **Technical Writer I** responsibilities

- Create, update, and maintain end user documentation, including installation and configuration guides, reference guides, how-to guides, online help, etc.
- Coordinate with developers and marketing teams, and other technical personnel to provide accurate and comprehensive information that is appropriate for the targeted audience.
- Develop documentation plans for assigned projects. Track documentation progress against the project schedule and report status to the Technical Communications Manager.
- Comply with Aardvark Technical Communications Style Guidelines and policies.

### **Technical Writer II/Editor** responsibilities

The same as Technical Writer I and these additional duties:

- Administer usability testing with the customers to ensure documentation is necessary and useful.
- Research engineering information such as drawings, design specifications, and test cases to gather relevant information.
- Work with subject matter experts, product managers, SQA, and other technical personnel to review and approve documentation updates. Obtain final sign-off from Technical Documents Manager.
- Use engineering tools and technology to access product information and push deliverables through the release life-cycle.

#### **Graphics Specialist** responsibilities

- Manage visual design development throughout the entire product lifecycle, from initial assessments through final design deliverables.
- Create deliverables such as process documentation, templates, banner layouts, color palettes, typography, user interface elements, and prototypes.
- Coordinate with subject matter experts, in-house and remotely, to create relevant content and campaigns for small businesses.
- Contribute to overall corporate marketing needs as well as client campaigns.
- Coordinate with the TechDoc team to shape the future of Aardvark.

## **Recommended Compensation Plan**

### **Pay Scales**

#### **Levels**

There will be two levels for the pay scales. The first will encompass all entry-level technical communicators and the second will encompass more experienced technical communicators and others with special skills.

The entry-level positions will consist of all recent graduates and anyone with 1-2 years of applicable experience. This experience could anything with an editing, writing, or proofreading capacity.

#### **Salary Ranges**

Entry Level: The **Technical Writer I** pay range will be **\$35,000-45,000** with recent grads being the lower end of the spectrum and the rest is based on experience.

Experienced Level: The **Technical Writer II/Editor** and **Graphics Specialist** pay range will be **\$40,000-50,000** and will be based solely on experience and knowledge.

These pay ranges are standard for a company of our size in our geographical location. If the budget does not support these ranges or the amount of employees, I would be happy to re-evaluate the numbers to align more properly with the plans of the organization.

### **Reward System**

I would like to propose a two-part system for the reward system: monetary and recognition. Employees should receive a yearly bonus of 3% of their salary if all goals are met by October 1<sup>st</sup>. A customer satisfaction survey will be deployed to the customers at the start of the fiscal year, and if documentation/TechDoc department receives at least a 90%+ approval rating from the customers, the employees of the TechDoc team will receive the bonus.

Customers are often vocal when a product is disappointing, but they also let us know when something is good. When this happens, I would like to recognize the employees. The desired form of recognition would be a company-wide email acknowledging the customer's praise, as well as a department lunch funded by management. I think doing this would encourage the continuation of delivering products the customers want.

**CONFIDENTIAL**

Again, this is my initial plan. If anything needs to be changed (number of employees, salaries, or rewards), I am happy to discuss it. I look forward to finding the perfect candidates for my team.

# Midas Project Plan

## Revision History

<i>Date</i>	<i>Version</i>	<i>Author</i>	<i>Explanation of Changes</i>
7/15/2013	R1	J. Kaltenbach	Created new layout

## Contact Information

Prepared By: Jenny Kaltenbach  
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## Approved By

<i>Name</i>	<i>Position</i>	<i>Date</i>
Julia Barnette	Product Manager	x/xx/2013
Judd Stohl	Development Manager	x/xx/2013
Jeff Flynn	Vice President	x/xx/2013

# Project Overview

## Description of the Larger Project

This project is for a complete new product called *Midas*. *Midas* will be a software piece developed in-house and will run under Windows. With *Midas*, user will be able to track stock portfolios, buy and sell equities, obtain detailed reports about their holdings, and make decisions about future purchases.

### Project vision and goals

Aardvark envisions providing a product that will align with the needs of the small investor and not huge organizations. The goal is to provide an easy-to-use, user-friendly financial software that allows the user to handle all of their portfolio needs.

### Project scope

This project is for an entirely new software offered by our company. The scope encompasses everything from beginning to end, including feasibility testing, usability testing, complete development of the software and supporting documentation. Members of every team will be involved in making *Midas* another successful product from Aardvark.

### Project schedule

The project is estimated to take six months and will involve two sets of tester before it is finalized.

<b>Milestone</b>	<b>Actual or Relative Date</b>
Alpha Release	April 1
Beta Release	May 15
Final Release	July 1

### Project budget

The budget is prepared and handled by the Vice President. The TechDoc Team will take all measures necessary to keep costs to a minimum.

## Description of the customer for the product and the information

The customer for this product are individuals who enjoy buying and selling stocks and would like a sophisticated software that allows them to do it. *Midas* will engage people who had some experience with stock, but on the personal/individual level. This software will appeal to any small investor that wants the same usability as one could get with a larger, more expensive software.

### Usability requirements

The software is intended for an experienced user of computers and financial software. However, *Midas* is user-friendly and a less-experienced user will also find that they can use the software. In addition to this, the documentation will also aid experienced and less-experienced users alike.

# Information Development

## Information-development project vision

The TechDoc Team will be creating all new documentation for Aardvark's new software. With the three pieces of documentation planned, it is our hope that users will utilize the documents to learn how to start using the software and all lessons/training that will be needed throughout their use of the software. Our documentation will limit calls and call times into the Support team, thereby limiting the stress that team will feel from the project.

## Project Schedule

<b>Milestone</b>	<b>Actual or Relative Date</b>
Meet with SME's and gathering information	February 1
Complete Getting Started Guide draft	April 1
Review of Getting Started Guide draft	May 1
Complete Help system draft	May 1
Review of Help system draft	June 1
Complete brochure draft	March 15
Review brochure draft	March 31
Final drafts of all documentation	June 15

## Project budget

The TechDoc Team's budget is based on the number of employees. Our department was approved for found positions besides myself, and has planned the documentation accordingly.

## Information-development project scope

The scope of this project is to provide three distinct customer documents: a 200-topic Help system, 50 page Get-Started Guide and job aid brochure.

- The Help system will include all items needed to operate the software.
- The Getting Started guide will include the initial steps needed to begin the program.
- The brochure will include items that will aid in the user's job.

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### Information-Development Project Scope

<b>Deliverable title</b>	<b>Part#</b>	<b>Delivery Method</b>	<b>Languages</b>	<b>%Changed</b>	<b>Page/Topic count</b>
Midas Help System	1	HTML	English	0	200
Midas Getting Started Guide	1	Print, PDF	English	0	50

## Roles and Responsibilities of the project team

Below is a list of everyone on the Technical Document Team and what their role is.

<b>Information-Development Project Team</b>			
<b>Role</b>	<b>Name</b>	<b>Location</b>	<b>Responsibility</b>
TechDoc Manager	Jenny Kaltenbach	Main Office <a href="mailto:jenny@aardvark.com">jenny@aardvark.com</a> 910-343-1213	Oversees all projects within the TechDoc team. Assigns tasks and sets milestones and goals for all team members. Responsible for all deliverables.
Technical Writer II/ Editor	Cassie Stroehmer	Main Office <a href="mailto:cassie@aardvark.com">cassie@aardvark.com</a> 910-343-1214	Administers usability testing with the customers to ensure documentation is necessary and useful. Researches engineering information such as drawings, design specifications, and test cases to gather relevant information. Works with subject matter experts, product managers, SQA, and other technical personnel to review and approve documentation updates. Obtain final sign-off from Technical Documents Manager. Uses engineering tools and technology to access product information and push deliverables through the release life-cycle.
Technical Writer I	Matt Kennedy	Main office <a href="mailto:matt@aardvark.com">matt@aardvark.com</a> 910-343-1215	Creates, updates, and maintains end user documentation, including installation and configuration guides, reference guides, how-to guides, online help, etc. Coordinates with developers and marketing teams, and other technical personnel to provide accurate and comprehensive information that
Technical Writer I	Liz Whiteman	Remote Office <a href="mailto:liz@aardvark.co.com">liz@aardvark.co.com</a> 910-443-1212	

			is appropriate for the targeted audience. Develops documentation plans for assigned projects. Track documentation progress against the project schedule and report status to the Technical Communications Manager. Complies with Aardvark Technical Communications Style Guidelines and policies.
Graphics Specialist	Tony Rogers	Remote Office <a href="mailto:tony@aardvark.co.com">tony@aardvark.co.com</a> 910-443-1211	Manages visual design development. Creates deliverables such as process documentation, templates, banner layouts, color palettes, typography, user interface elements, and prototypes. Coordinates with subject matter experts, in-house and remotely, to create relevant content and campaigns for small businesses. Contribute to overall corporate marketing needs as well as client campaigns.

## Larger Project Team

<i>Role</i>	<i>Name</i>	<i>Location</i>	<i>Responsibility</i>
Product Manager	Julia Barnette	Main Office <a href="mailto:julia@aardvark.com">julia@aardvark.com</a> 910-343-1205	Maintains updates to software and product integrity. Begins process for usability testing and handles all customer requests. Supports TechDoc team by providing knowledge and insight into the software.
Development Manager	Judd Stohl	Main Office <a href="mailto:judd@aardvark.com">judd@aardvark.com</a> 910-343-1210	Oversees development and QA teams. Creates and provides all scripts and develops new software. Reviews documentation to ensure accuracy.

Vice President	Jeff Flynn	Main office <a href="mailto:jeff@aardvark.com">jeff@aardvark.com</a> 910-343-1200	Oversees Product Manager and Development/QA, TechDoc and Support teams.
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## Project dependencies and Risks

### Project assumptions

The assumptions made that are required to complete the high-quality documentation on schedule are:

- Access to develops and QA
- Access to the program with the Alpha release
- Assistance from the product manager and marketing manager to create the brochure

### Risk Analysis

<b>Risk Description</b>	<b>Probability</b>	<b>Potential Impact</b>	<b>Prevention Plan</b>	<b>Contingency Plan</b>
Unable to meet with developers if too busy	Medium-high	Medium	Make contact early to make plans to meet	Learn the product by using it

### Dependencies Calculation

## Project total hours and costs

<b>Deliverable Title</b>	<b>Page/Topic Count</b>	<b>% Changed</b>	<b>Total Hours</b>	<b>Total cost</b>
Midas Help System	200	0	200	\$20,000
Midas Getting Started Guide	50	0	50	\$5,000
Midas Job Aid brochure	2	0	20	\$2,000
Travel for user testing				\$2,000

### Project resource requirements

For a successful project, we will be seeking help from other departments. Members of the development/QA team has agreed to show our technical writers the new software. They will be acting as Subject Matter Expert's, and are an essential portal to our learning and documenting the new product.