Topic Based Authoring: Why Bother?

Presented by Joan Lasselle and Linda Urban, October 4, 2012

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- Founder and President, Lasselle-Ramsay
- Helping clients move to structured content
- Partner: Linda Urban Communications and Just Systems

Linda Urban

- Principal Consultant, Linda Urban Communications
- Work with writing teams to improve skills and create useful, usable content and instruction
- Current focus: up-front analysis and workplace research
- Partner: Lasselle-Ramsay and Just Systems

How this talk came about

- Our experience working with clients
  - Lots of potential benefits from topic-based authoring
  - Getting real benefits from it can be challenging
  - Some things seem to consistently trip groups up – why is that?

- Can we find a way to talk about what it really takes?

What brought you here?

- You saw the announcement for this webinar.
  - What brought you here today?
  - What are you hoping we will cover?

Please type in chat

Poll: Where are you in the process?

- Just investigating topic-based authoring
- Know you want to implement
- Currently in DITA
- Currently in DITA and have CCMS
- In DITA, and now reworking your content

Who this talk is for, and where we're headed

- Investigating
- Moving forward…part way along
- Already in DITA & XML… now what?

- Define terms and identify benefits
- Find out what business problems you hope to solve
- Identify common pitfalls
- Present seven steps to success

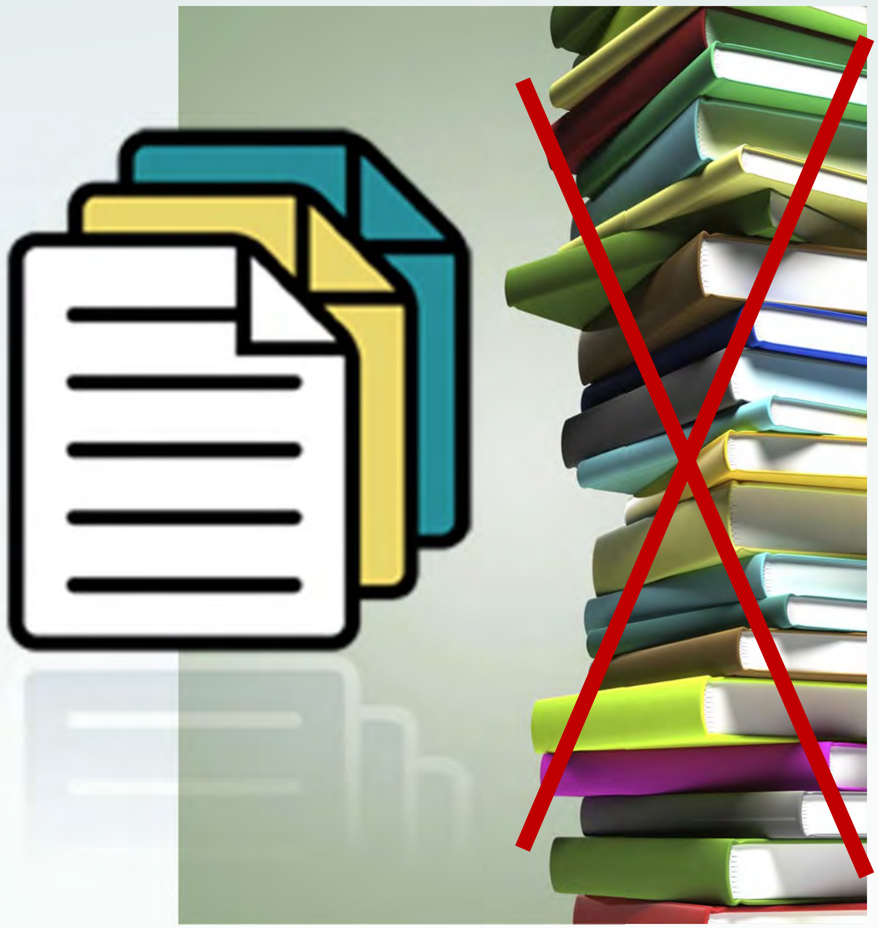
***We hope to have a conversation…not just lecture…
please post your questions in chat as we go along***

Topic-base authoring – hardly new!

- Been around for decades
- Central to online help
- Came out of early work on information design
- Aligns with research on cognition and learning
- Not necessarily = DITA

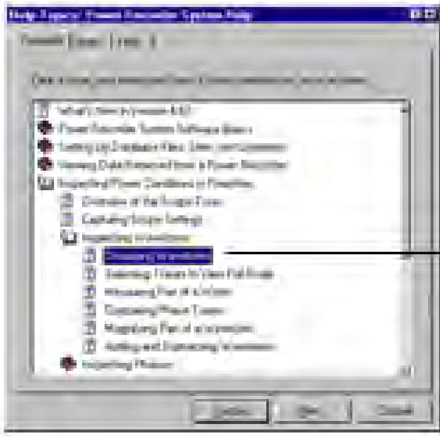
What is topic-base authoring?

- Writing technique
- Modular not linear
- Topics stand alone
- About one specific subject (it answers a question)
- Follow a consistent pattern
- Uses topic types (concept, task, reference, other…)

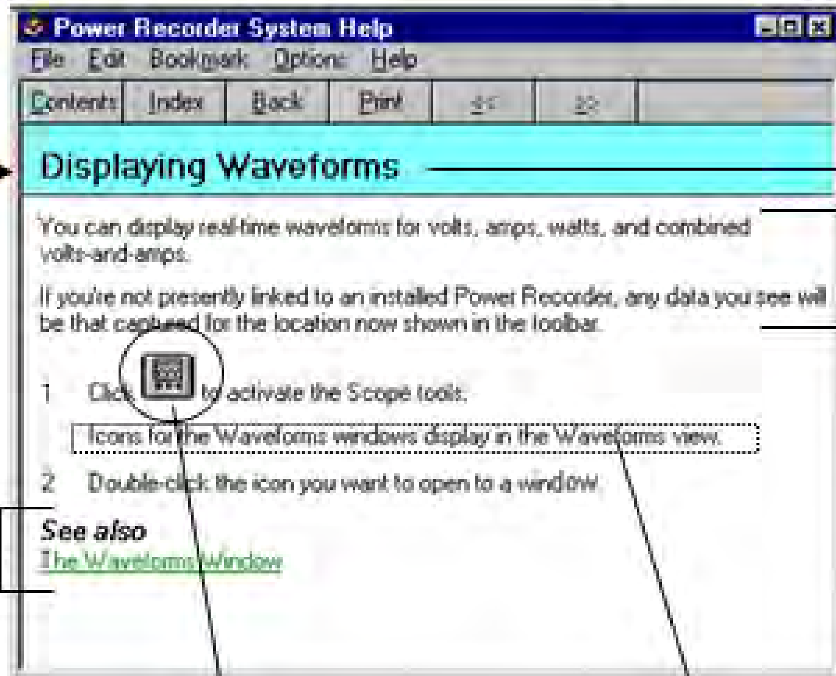


Procedural Topic (Task) Sample

Note: The editorial decisions shown in this handout reflect the decisions made for THIS help design. They are not wholesale recommendations for ALL help designs.



Tasks are accessible from the contents and the index, and are linked to from other related topics.



Heading (for task, start with a a gerund)

Introduction: Indicate what the task accomplishes, why the user would want to do it. Also mention anything the user should know before starting.

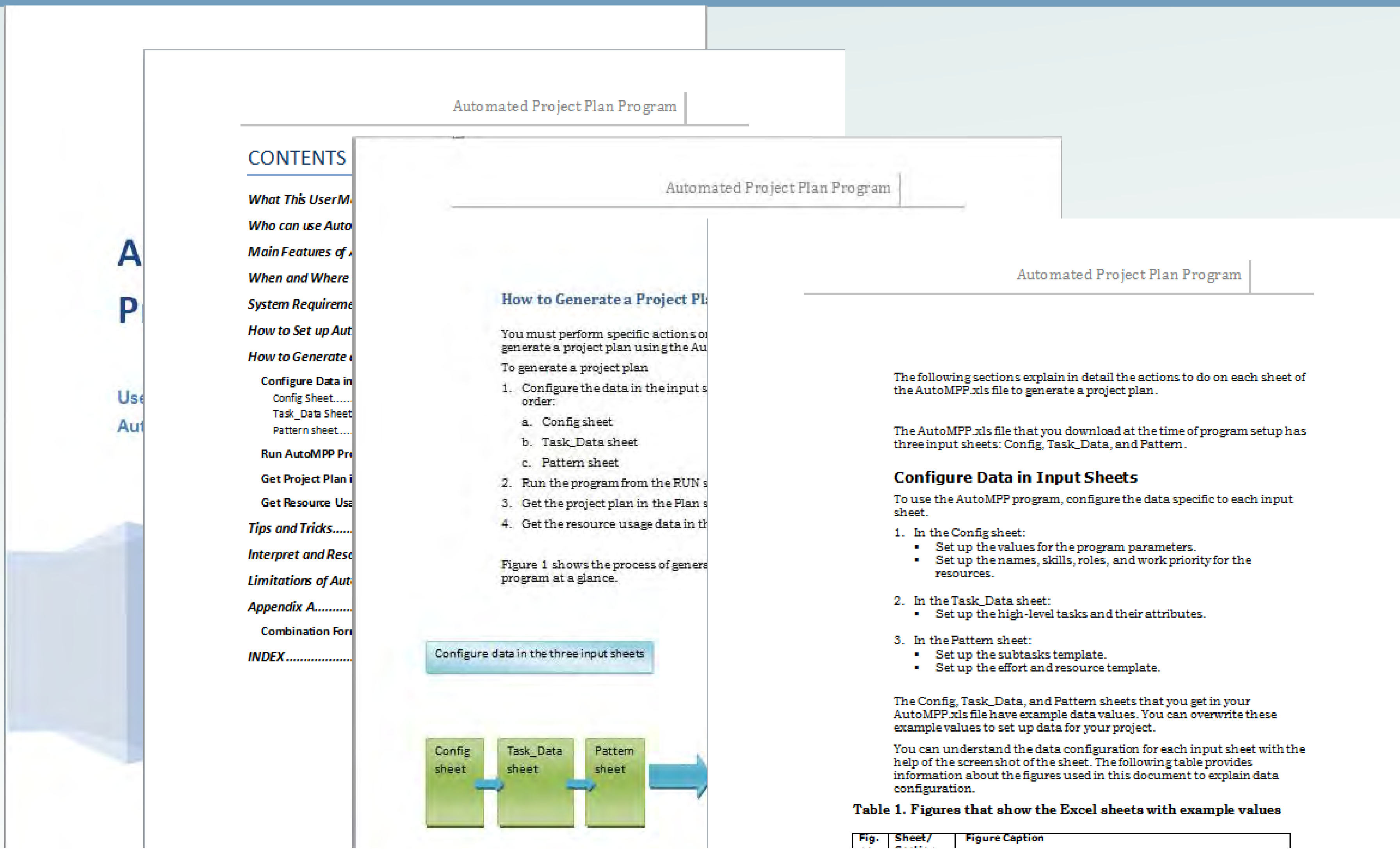
List related topics at the bottom, under the heading "See also".

Show buttons that users click.

Include result statements after actions.

From the first "Online Help" class Linda taught, in 1999

Today's focus is often
Moving from linear content to modular



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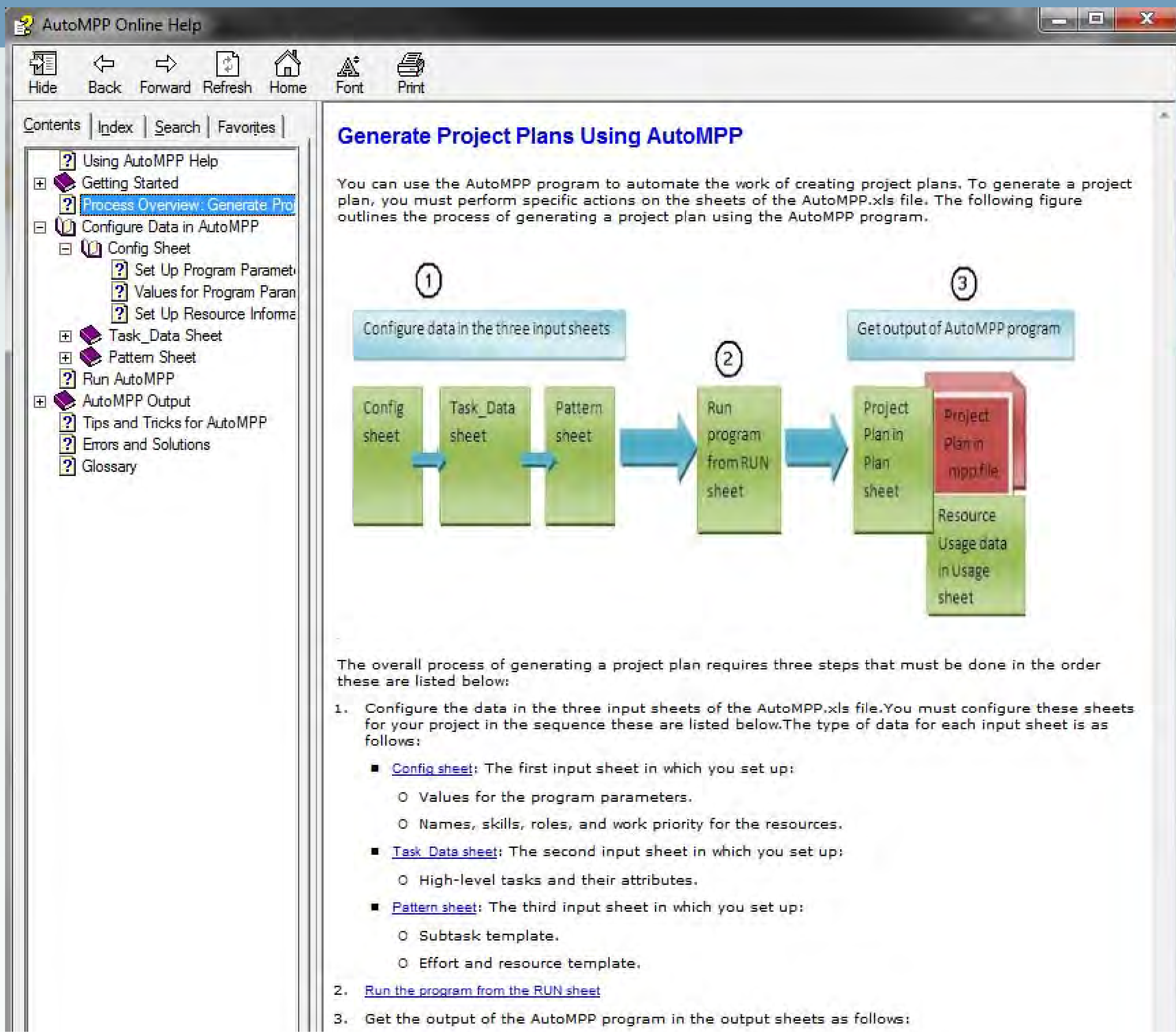
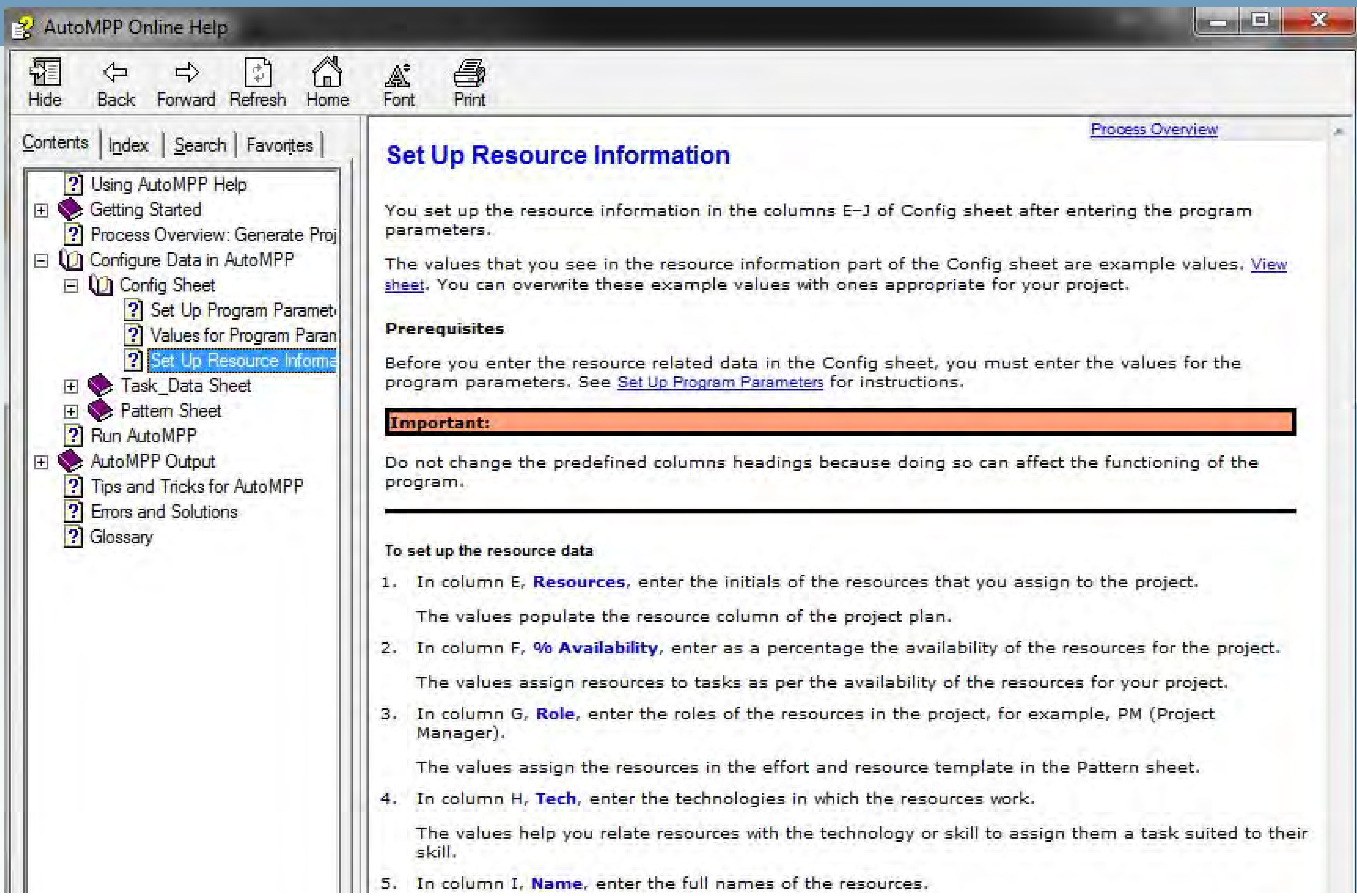
After: Stand-alone, modular topics



After: Stand-alone, modular topics



Why bother?
Common challenges in the content landscape

Customer experience:
improve access & usability

Shorter product cycles
- Increased maintenance load
- More customization

Do more with less
- Process improvement, shorten writing cycles/review time

Support Agile development process

Support new output formats

Cut translation costs

Poll: What's in your landscape? What are the challenges?

- Customer experience (improve access & usability)
- Shorter product cycles
- Support Agile development process
- Support new (and varied) output formats
- Do more with less
- Cut translation costs
- Something else? (type in chat)

Can topic-based approach address those?

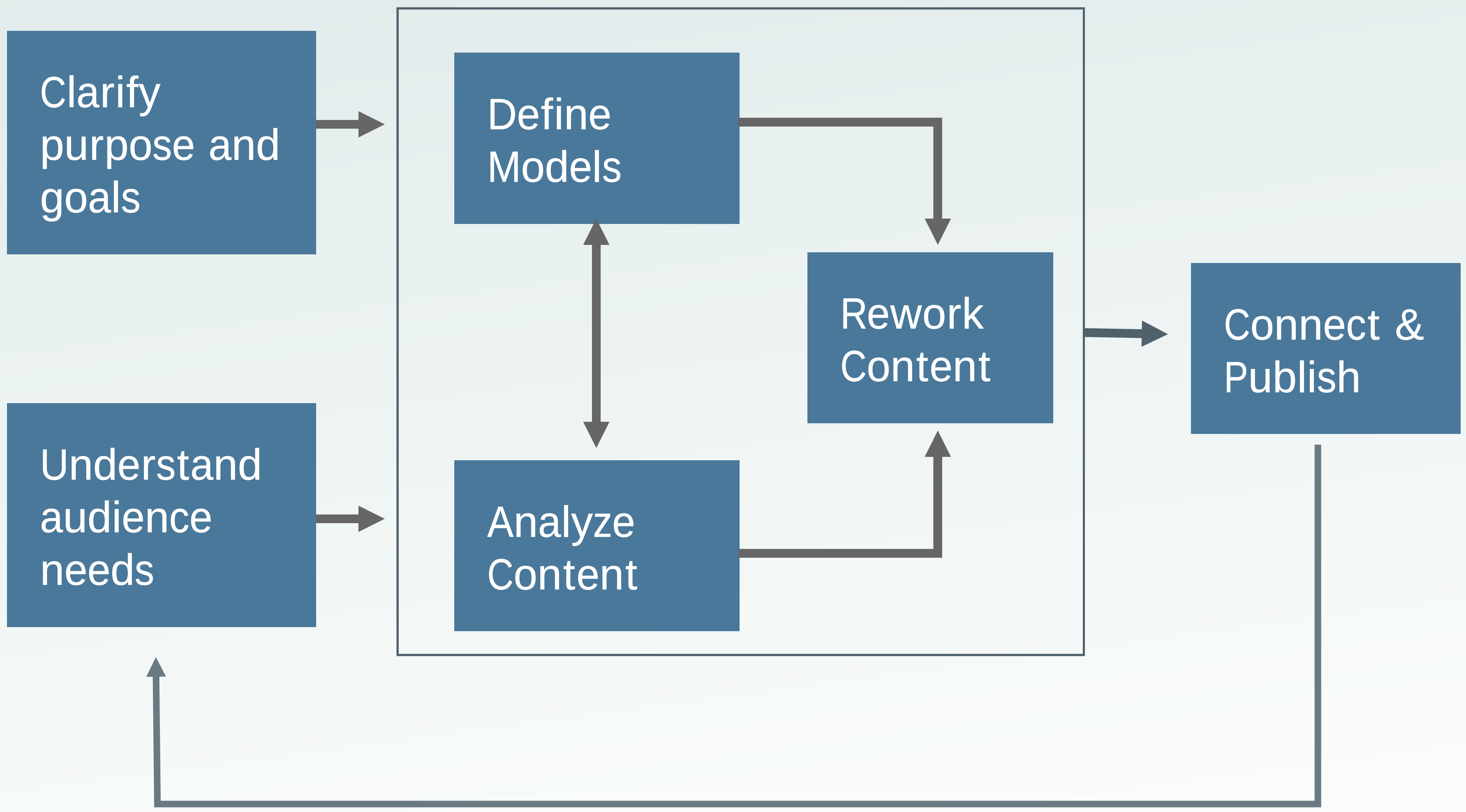
Common Challenges

- Customer experience (improve access & usability)
- Shorter product cycles
- Support Agile development process
- Support new (and varied) output formats
- Do more with less
- Cut translation costs

Topic-based benefits

- Consistent content, written to address user needs
- Modular topics allow shared authoring, faster reviews, flexible workflows
- Reduce, reuse, and repurpose
- Publish to multiple outputs

Nothing happens in a vacuum



What gets overlooked and underestimated?

- **Clearly defining what you want to accomplish**
  - Business needs
  - Customer/user needs
  - How you will know if you've been successful?
- **Looking closely at what you have**
  - Need to analyze your content
  - **It's more than chunking, or converting to XML – it's rethinking, and reworking**
- **Underestimating work and time: It takes more time than you think**
  - Analysis, tool selection, training (techniques and tools), designing your information model, prototyping…they all take time.
- **Getting support and supporting your team**
  - You must communicate the need and sell it appropriately
  - The skills aren't mastered in a 3-day training – it's an ongoing, iterative process

Summary: Seven steps to follow

1. Get started—answer “why”

   Define your goals, clarify your audience, and determine how you will measure success

2. Build (and sell) your plan—answer “who, what, and when”

   Create urgency, identify your team, define milestones

3. Analyze your content
4. Create an information model

   Define topic types and topic clusters

5. Make time to rework the content

   …And **not** at the same time as the next product release

6. Provide ongoing support, coaching, and feedback
7. Iterate: Process, content, and models

Discussion

Topic Based Authoring

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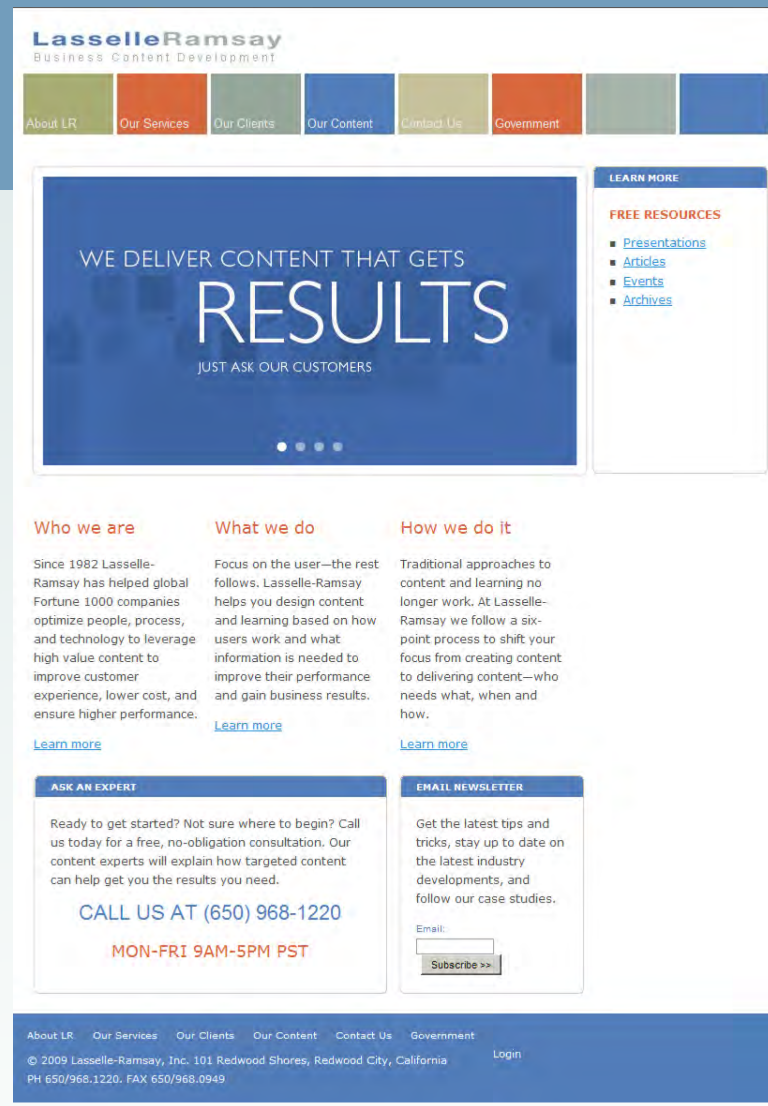

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