Managing Up

Practical Metrics for Publications Management

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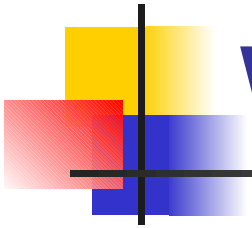
What is Managing Up?

- Managing the relationship between yourself and your immediate manager
- Managing the communications between your group and upper management
- Helping your manager to effectively communicate your needs and successes
- Making your group visible

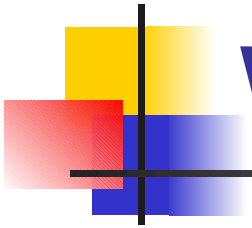
What Does it Involve?

- Establishing trust and credibility
- Getting the job done: understanding organizational requirements and meeting organizational goals
- Handling problems at your level as needed
- Communicating status, needs, risks, and wins
- Communicating willingness to take risks when appropriate
- Claiming rewards



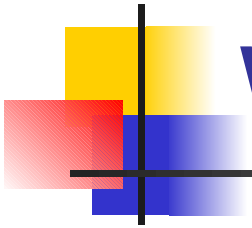
What are Metrics?

- Tools and techniques that quantify activities, status, needs, risks, and wins
- For example, data shown in spreadsheets, charts, or graphics



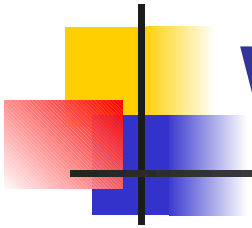
Why Are Metrics Useful?

- Summarize information
- Clarify rationale
- The big picture
- Provide an "objective" viewpoint
- Provide evidence of "homework"
- Language of upper management
- Place publications contribution to overall business goals



When Can Metrics Help?

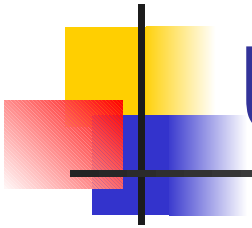
- Justify headcount or time estimates
- Justify rationale for increases and rewards
- Show costs or time dependencies
- Quantify risks
- Quantify accomplishments in business terms
- Characterize group skills



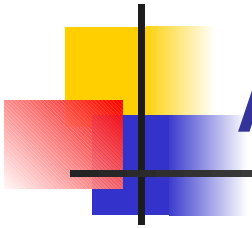
What Not to Do

- Don’t put too much emphasis on data gathered outside your context
- Don’t overwhelm your manager with statistical detail – show the big picture
- Don’t provide productivity data on individuals
- I don’t really recommend pages per day
- (More discussion later)

What Kinds of Metrics are Useful?

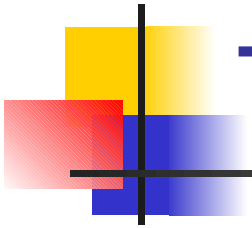


- Engineers to writers; writers to editors
- Pages per manual – Help topics per product
- Manuals/pages per release
- Releases per quarter/per year
- New products/maintenance releases per year
- Someway to characterize size of new products – e.g. # new classes and methods
- Training to documentation
- Readability
- Information most often accessed, best-seller



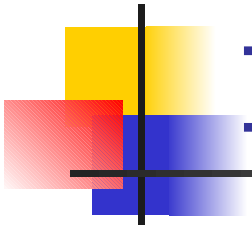
Additional Metrics

- Average turnaround time
- Bug reports
- Progress reports
- Schedules
- Forecasts
- % Review Complete
- Skills summary, e.g 50% of group can code, certain degrees, years of experience, etc.
- Cost-benefit analysis
- Customer satisfaction surveys and metrics



Tools

- Spreadsheets
- Charts
- Database



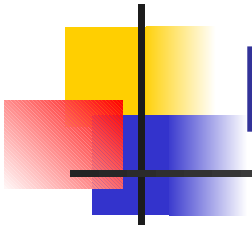
Include Metrics

- In status reports
- In one-on-one discussions
- At team meetings (sparingly)
- On websites to show progress
- In presentations
- In hiring justifications
- In forecasts

Engineers to Writers

- Industry median 10-1
- 5 -1 common for software
- 20 – 1 high reported informally
- 50-1 exists (hardware)

Sources:
JoAnn Hackos A Study of the Relationship of Technical Communicators to Product Development Staff February 1999
TECHWR-L Message Board informal exchange July 1996 – Bruce Nevin Cisco



Detail from JoAnn Hackos

- In companies where writers report to engineering lower numbers of engineers to writers – economies of scale with centralized groups
- "High-end" products may rely on more engineering documentation and professional services
- Important factors include process maturity, product maturity (early adopters may need less), how much engineering affects user, cost-model

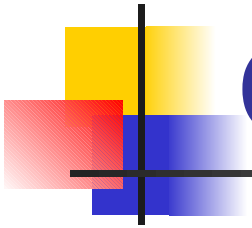
Writers to Editors

- Joanne Hackos: 10-15% of writer time
- Jean Weber: 9 -1
- Denis Hanrahan: Unisys 15 -1 (high)

Sources:
JoAnn Hackos, Managing Your Documentation Projects, 1994
Jean Weber, The Technical Editor's Eyrie (www.jeanweber.com) Issue 6, April 1999

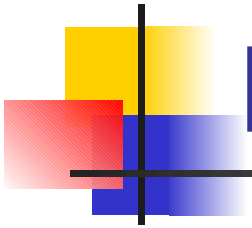
Pages per Day

- "2-3 pages per day" for final copy seems to be a generally reported statistic
- The most useful statistic is your own past history



Customer Surveys

- Use questionnaire or interview
- Accuracy, ease-of-use, what can be improved, topics most valued
- Use scale with 3 or 5 levels
- Web analysis tools can help with customer access to web-based documentation – for example what info is accessed most often



Examples

- Spreadsheet showing assignments, due dates, covered projects, risks
- Spreadsheet and chart showing growth of product line, API, engineering staff, writing staff, and manual size
- Typical spreadsheet for forecasting budget
- Lifecycle chart showing roles and involvement