

May 16, 2005 – How to Successfully Set Up an Off-Shore Technical Writing Team in India

A senior manager of technical publications at a large company (let's call him "Bob") gave a presentation to BAPMF about his experience on how he successfully set up a technical writing team off-shore in India.

Bob was asked to start his new team in India from scratch. The task was challenging, but he rose to the challenge. In 18 months, starting from zero, he built a team with a headcount of nearly 40.

WHY CREATE A TECHNICAL WRITING TEAM IN INDIA?

Like most technical publications managers, Bob was not given a choice about whether or not he wanted to create a writing team in India. The mandate from upper management is "do it, and make it work".

Reasons given for creating a technical writing team off-shore include the following:

- The company can lower its technical writing costs.
- By having a team abroad, work can go on around the clock.

India was chosen for an off-shore site for the following reasons:

- There is a large pool of engineers and scientists whose English is quite good.
- With training, their writing skills can be quite good.

RECRUITING THE TEAM

Every U.S. company that seeks to off-shore technical publications jobs to India finds that recruiting in India is a difficult, time-consuming, draining learning experience. Although the population in India is vast, and there are many engineers and scientists who have good English, the talent pool of experienced technical writers is shallow. The publisher "Indian Express Group" estimates that at present – although their numbers are growing quickly - there are 5,000 technical writers in India, 700 of whom are STC members.

Bob recruited individuals with degrees in English, the sciences, or information technology. In these areas, the Indian candidates were well educated. What they lacked, however, is the kind of judgment and writing ability that only years of experience can provide.

Rather than contract with an agency to act as an intermediary between his firm and the Indian workforce, Bob screened applicants and directly hired staff consisting of writers, graphic artists, programmers, editors, and production personnel. (Bob warned that the concept of "production" work seemed to be a foreign concept to the candidates.) Using this approach, Bob had to go through 300 candidates for every 8 that he hired.

- The upside of this approach is that he has perhaps a more consistent and stable workforce.
- The downside was the large expenditure of personal and management time for Bob.

To get the best talent, it is advantageous to recruit from all over India. However, in contrast to the U.S., in Indian culture, one's family is paramount. Bob cautions that if your company's facility is in a particular city - such as Bangalore – a candidate's family may disapprove of a candidate relocating, even if the candidate is offered large monetary incentives. Ultimately, it is the family - not money - that determines whether or not a candidate will relocate to a site.

Once Bob had a pool of candidates from whom to select, he found that interviews can be tricky. Indian candidates tend to be "too" respectful in that often they are reluctant to ask questions in an interview. Instead of interpreting this reluctance as a lack of initiative, Bob learned that he had to

draw out candidates so they would open up. Also, some candidates had good written English skills but an accent so heavy that it was difficult to understand them.

Just as with anywhere else, Bob asked candidates for three references. Also, just as with anywhere else, Bob had to verify that candidates did not misrepresent themselves and claim skills, knowledge, or degrees that they do not have. But getting references and verifying backgrounds in India was challenging because Bob had to do this from a long distance. In addition, he found that every three months he had to change the writing and editing tests he gave because candidates would talk among themselves and share information about the test.

Once Bob found a candidate who had the skills and whose family was comfortable with that candidate joining Bob's company, the next challenge was trying to determine pay scales. Bob's company wanted the pay for the Indian writers to be competitive, because so many companies are competing for the same small set of candidates. It is neither unusual for a candidate to receive 2, 3, or more offers, nor is it unusual for a candidate to accept an offer but then not show up for work.

Even though the presumed ratio for the cost of hiring is that 2.5 or 3 Indian writers can cost as much as 1 U.S. writer, the main reason it is difficult to create monetary incentives is that in India, taxes are very high – up to 1/2 of one's salary can be taxed. In addition, Indian compensation is structured differently than in the U.S. Beside their pay, Indian employees expect allowances for transportation, meals, housing, travel, and vacations, all of which must be taken into account when determining pay scales.

Presumably to simplify pay negotiations, at present Bob's company offers all candidates the same starting pay. Even so, Bob warns that salaries are increasing rapidly for Indian writers who do job hop if they are not happy.

Once things were set up, Bob also hired a native Indian in the U.S. to relocate to India to manage the Indian team so that Bob had a single point of contact for day-to-day issues. But Bob felt it was impossible to delegate the essential startup tasks for hiring the team, which is why he did the hiring himself.

BUILDING THE TEAM

Once Bob successfully hired writers, he put into place a plan he developed to train the writers. At present in India, there is little knowledge of tools such as FrameMaker or RoboHelp, so investing in good training programs is essential. In addition to arranging for new-hires to be trained on tools, products, processes, and technology, Bob assigned each new-hire a mentor to help with the training process.

Before a new writer can be productive, the ramp-up time is considerable (at least 3 months). Bob noted that while bringing new writers to the U.S. headquarters for training might result in better and quicker training, there are big obstacles to things such as obtaining an Indian passport. (Bribery of local officials is often expected to overcome such obstacles.)

HOW THE TEAM FUNCTIONS

The typical practice for many companies is to divide a large document between U.S. and Indian writers to take advantage of around-the-clock work. During the day, the U.S. writers work on the document. At day's end, they check in the document into a document version-control tool such as Documentum or Visual SourceSafe so that the Indian writers can continue work on the document.

However, Bob stressed that at present he found it is not wise to work collaboratively with Indian writers on the content of large documents. For large documents, he suggested that the Indian

team create the glossary and index, check cross references and links, create and check the table of contents, and other production tasks.

He recommends – especially at first – that the Indian writers be given legacy documents for which maintenance work needs to be done. He found that stable, well-defined documents are an ideal way for Indian writers to begin.

When Indian writers feel they are finished with a document, Bob has U.S. writers edit and comment on documents, in terms of consistency, grammar, and appropriate wording in regard to the U.S. audience of documents. Bob has the Indian writers themselves write up comments from the U.S. writers so they can learn about what constitutes "quality".

After Indian writers acquire the necessary skills to write more than legacy documents, another niche for them is to work on new documents for products for which development occurs in both the U.S. and India. An additional niche is product release notes that typically are written near the end of a product's development cycle. By U.S. and Indian teams working around the clock, product release notes can be finished on time.

When assigning work, Bob noted that the important thing is to leverage work so that one team does not repeat the work of another team. Projects can be done in tandem, but they require additional management overhead that must be factored into schedules.

Due to the extreme difference in time zones - India is literally half-way around the world (12.5 to 13.5 hours away) - phone meeting times are necessarily very inconvenient for both the U.S. side and the Indian side. To accommodate the need for such phone meetings, the company staggers the start times for teams. Some team members start their day at 8 a.m., while others start at 9 a.m., and still others start at 10 a.m. Meetings often start either at 7 a.m. (for the U.S. Southwest) or 10 p.m. (for India), with rotation of the start times. (Bob warns that Indian telephone numbers can be tricky to dial!)

Bob stressed that the need for *constant* communication by phone cannot be avoided. In addition, especially during the hiring phase and when building the team, Bob could not avoid frequent travel to India if the team was to succeed.

Bob has bi-weekly telephone meetings with the manager of the Indian writers. On a day-to-day basis, Bob finds that email works best. He finds that even after speaking with someone, what works is to always follow up by email, asking the Indian team member to "now send me an email that tells me what I just told you."

KEEPING THE TEAM – AND KEEPING THEM MOTIVATED

Bob said that so far, in contrast to the experience of some other companies, in 2 years time he has lost only 3% of the Indian writing team. His secret to keeping the team and keeping them motivated is call them frequently and use a personal touch. (Alternatively, some companies keep Indian writers by having them pay a stiff bond if they quit before an agreed-upon period.)

As in any culture, relationships are important, but even more so in India. Bob takes the time and effort to let all Indian writers know that he cares about them. Once a month, he has a group session with all team writers, and he meets 1:1 with each writer after the group session. In addition, once every 3 months, the team has an offsite. Bob stressed the importance of having a relationship with each writer because they want and need guidance and leadership.

Part of keeping the team motivated is keeping the U.S. writers motivated as well. His company does have U.S. writers, but not in the same numbers compared to previous times. Bob does not recommend transferring all writing jobs to India because the U.S. writers still have a better skill set. He feels there must be an equilibrium between the teams. He also feels that having both

Indian and U.S. editors is essential. (For the Indian team, the ratio of editors to writers is 1 editor for every 15 writers.)

WHAT ARE THE RESULTS?

Bob said that the Indian technical writers have strong skills. They are hard-working, motivated, enthusiastic, eager to learn, and best of all, they are highly technical. The team works long hours, the same as the U.S. writers. Bob said that by the U.S. team working around the clock with the Indian team, documents are done in less time, but maybe by just about 1/3.

At present, however, Bob said the level of quality from the Indian writers is not adequate for publications that have maximum strategic importance or wide readership. Bob mentioned that the U.S. writers are frustrated because they must accept less quality in exchange for getting documents out in a hurry. They have had to tell themselves that if the company's vice presidents are satisfied with their documents, then the documents are "good enough". As for usability, Bob said that the concept of usability is a new one for India.

While Bob was proud of his achievement, the overall impression given to BAPMF members was that the level of effort and cost in terms of Bob's personal life was enormous. Also, for a long time, his focus was taken away from managing the U.S. workforce, to which he has now returned his attention to achieve the right balance. He indicated that for the near term, no further expansion of the Indian operation is planned. Instead, he is now focusing on hiring for the U.S. team.

Bob observed that in terms of head count, a ratio of 6 to 7 U.S. writers to every 1 Indian writer appears to be the balance that works best. He is firmly committed to maintaining and even expanding the U.S. team. Although on paper a dramatic reduction in technical publications budgets might be possible if all writing were done off-shore, from the perspective of current real-world operations, the quality of publications would decline. What can realistically be achieved is a leveling off of the cost of maintaining technical publications for a large enterprise, while leveraging a new workforce that can increase the number of manuals to be written or maintained.

WHAT ARE THE CHALLENGES?

Some of the continuing challenges for any off-shore group include the following:

- How can work be done faster but with the same quality?
- How can synergy between teams be developed and maintained?

Bob's company also has off-shore teams in Ireland and Canada. For India, Bob summarized the biggest challenges for working there as follows:

- Finding good writer candidates
- Determining in an interview if the candidate will work out
- Managing the time difference

WHAT ARE THE INGREDIENTS FOR SUCCESS?

Bob summarized the ingredients for success as follows:

- Recognize that hiring an Indian writing team is a long-term investment.
- To succeed, managers cannot delegate the hiring process. (Bob mentioned that there are only 3 reliable writer vendors in India.)
- Have all writing processes defined ahead of time.
- Hire the right people, including both on-shore and off-shore editors.
- Take the time to train your new team well.

- Have dedicated managers, on-shore and off-shore, who communicate well and often.
- Managers must spend a lot of personal work and work many long and late hours to make this operation a success.

TIPS

Bob recommends that from the very start of an off-shoring venture, technical publications managers should develop metrics and gather data concerning the amount, quality, and consistency of work done by writers.

He also suggested that when a company hires writers off-shore that managers estimate the total cost to the company by doing the following:

- Track the number of emails you send and the time it takes to compose them.
- Track the number of calls you make and the time it takes to prepare for them and follow up on them.
- Track the amount of time U.S. writers spend training the Indian writers.
- Track the amount of time U.S. writers do follow-up work on documents on which the Indian writers have worked.
- Track the amount of time human resources personnel spend explaining company policies.
- Track management time: travel time and hours worked on developing tests, interview questions, and training programs.

FUTURE TRENDS?

Although at present the writing coming from the Indian writers is not on par with the U.S. writers, this situation could change over time. Because of the volume of work being sent to India, there are several reports that India is subcontracting work to China. As a result, U.S. technical writers can expect that the trend will be that still more technical writing work will be sent abroad.