Characteristic: Organizational Structure

An organizational structure that enables information developers to produce consistently high-quality work.

Levels:

1	Information developers work for technical managers. Information developers usually work alone or in small groups.
2	A centralized information development organization is in place. The organization manager is knowledgeable about information development.
3	A senior manager designates leads for individual projects. Specialized job functions have been developed.
4	Information developers are in a matrixed organization, reporting to a central group but working closely with cross-functional project teams.
5	Information developers have leadership roles on cross-functional project teams and with peer organizations.

Current survey questions

1. There are designated information developers.
2. There is a centralized department with an industry knowledgeable publications/training manager.
3. Publications staff members are involved in the complete product development life cycle.
4. Specialization of tasks occurs in the information-development process (e.g., graphics, editing, production, tools specialization, repository management, information architecture).
5. Project leads are assigned to manage day-to-day information-development and project-management activities.
6. Publications staff members function effectively on cross-functional teams to represent the interests of information development.
7. Publications staff members are committed to the welfare and recognition of their central organization, not just to their individual projects.
8. Publications staff members influence the design of the product.

9. Publications staff members work together to plan, design, and develop content shared among deliverables.
10. Publications staff members take leadership roles in the information-development industry as a whole (e.g., leading roles in professional organizations, authoring articles in the field, publishing research results, giving presentations, teaching seminars).

Characteristic: Quality Assurance

A series of activities specifically designed to promote uniform high standards of quality, including copyediting, developmental editing, peer reviews, and technical reviews of draft information products. Includes usability testing and customer studies to ensure that the quality achieved meets customer needs.

Levels:

1	Information developers are responsible for their own quality assurance. Few or no corporate-wide standards and best practices are in place.
2	Standards are in place and designated individuals have begun to be responsible for maintaining the standards.
3	Designated individuals (editors) are responsible for maintaining standards. Developmental editing is in place to assist in developing consistent information design and architecture.
4	Usability assessments are a standard part of the information development process.
5	The outcomes of quality assurance activities are measured as part of a continuous improvement process.

Current survey questions

1. Information developers edit their own work and perform other quality assurance tasks on their own work.
2. Peer editing occurs for some publications.
3. Organizational editing and information design standards (style guide) are in place.
4. Style standards are followed for publications.
5. Final production and copyedits are done by staff assigned especially to those tasks.
6. Content is reviewed by senior staff or developmental editors during the information-development process.
7. Information is tested against the product.
8. Usability testing of publications is performed.

9. Reviews by subject-matter experts are conducted on publications.
10. New publications designs go through usability testing before implementation.

Characteristic: Planning

Activities to ensure that every information product meets customer needs as well as the demands of schedule and budget. Includes the development of adequate resources and budget to ensure that required quality standards are met.

Levels:

1	Individuals sometimes create Information Plans.
2	A standard Information Plan is in place and followed for many projects.
3	All projects begin with Information Plans. A standard Information development process is followed by staff.
4	Plans are regularly reviewed to encourage innovation and cost control.
5	The planning process is measured to ensure that productivity and performance goals are achieved.

Current survey questions

1. Information developers create Information (Documentation) plans for publications projects.
2. A standard information planning process is in place.
3. A standard information planning process is followed for projects.
4. Information plans are reviewed by project leads or team members for completeness and conformance to standards.
5. Plans are updated as the project progresses.
6. Publications staff members regularly review planning activities to ensure that the process is effective in promoting cost effectiveness.
7. Publications staff members regularly review planning activities to ensure that plans incorporate direct user feedback.
8. Publications planning is coordinated with product development processes and life cycle.
9. Cross-functional teams (e.g., publications, training, service, support, product development, and so on) are involved in the publications planning process.
10. Publications planning is an integral part of the product-development life cycle.

Characteristic: Estimating, Scheduling, and Tracking

Activities to ensure that the information-development process is being followed to meet schedule and budget requirements. Includes project tracking to assess and accommodate the impact of project changes and changes to customer requirements through the course of the project. Establishes project histories to better inform planning for future projects.

Levels:

1	Assignments are made without knowing if they can be accomplished by the deadline while maintaining quality.
2	Information developers apply guesses to determine if they can complete projects by the deadline while maintaining quality.
3	Projects are carefully estimated according to data on previous projects. Projects are carefully tracked to ensure they will be successful.
4	Projects are estimated and tracked so that adjustments can be made to resources, schedules, and scope of work in response to requirements changes.
5	Complete development projects are scheduled and tracked, and they include the requirements to meet quality goals in information development.

Current survey questions

1. Publications staff members complete projects in compliance with project deadlines.
2. Publications staff members estimate their own projects based upon previous project experience.
3. Standard project estimating and scheduling processes are in place.
4. Staff members are assigned to projects based on project estimates and schedules.
5. The scope of each publications project (level of difficulty, number and type of deliverables, etc.) is estimated using standard methods established by the publications organization.

6. The hours and staffing required to complete each publications project are estimated using standard estimating formulas.
7. Project estimates are updated as the project progresses.
8. Project leads negotiate additional staff or time as projects change or may scale back the project deliverables to maintain the original staff and schedule if necessary.
9. Quality assurance processes (editing, reviews, verification, and validation) are maintained even if the project becomes more difficult to complete.
10. Projects are tracked in terms of total hours, processes, and deliverables.
11. Careful comparisons are made between the estimated and actual hours expended on a project and estimates are adjusted for the remaining part of the project.
12. Publication milestones are established at the beginning of the project and the project staffing is adjusted to ensure that the milestones are met.
13. Specific completion requirements are defined for each scheduled milestone.
14. Publication estimates and schedule requirements are taken into account in product-development schedules.
15. Publication project leads participate in the initial scheduling of the product-development project so that publication needs are taken into account.
16. A formal procedure is in place to systematically review the status of the publication projects (e.g., progress reports).
17. The organization has in place a formal procedure to review the impact of product changes on the publications scope, staffing, and schedule.
18. A formal process is in place to review the project at the end, including reviews of the original estimates, dependencies, staffing, and schedules. Reviews include an examination of actuals versus estimates.
19. The organization collects data on previous projects to use for refining estimating and scheduling processes.

Characteristic: Hiring and Training

Information developers are hired by knowledgeable professionals in the field, and hiring is based on a wide range of clearly defined professional requirements. Once hired, information developers are provided with internal and external opportunities for continuing training so that best practices in the field are understood and maintained.

Levels:

1	Information developers are hired by technical and other managers. They are typically hired for technical and tools expertise rather than information-development skills and training. No regular training is provided.
2	Information developers are hired by knowledgeable managers and peers for technical and tools skills and sometimes for expertise in information development. Training is provided occasionally by request.
3	Information developers are hired for their expertise in specific specializations. Training is considered a required part of each person's professional development.
4	The skills of senior information developers are leveraged through hiring of entry-level staff. Training and mentoring are provided internally, and external opportunities for growth are regularly provided in specialized areas.
5	Information-development managers are provided with management training and development opportunities to increase their understanding of business objectives.

Current survey questions

1. Information developers are hired by technical publication professionals, rather than by product developers or other department managers.
2. Information developers are hired by publications managers using a combination of criteria including writing, information design, subject matter, and tools expertise.
3. Information developers are provided with internal training on the company's

products.

4. Information developers are hired as members of a collaborative team, including more and less experienced contributors.
5. The information development team distributes responsibility based on specialized skills, including project management, editing, information architecture, graphics, localization and translation, and document production.
6. Evaluating the skills of new hires through testing is a standard part of the hiring process.
7. The skills and assignments of senior staff members are leveraged by hiring entry-level information developers.
8. Information developers are provided with outside training opportunities in technical communication subject areas.
9. Publications managers are provided with training in personnel management.
10. Publications managers and senior information developers are provided with training in project management.
11. Training or mentoring is provided for inexperienced information developers.
12. Publications managers are provided the opportunity for business management training.
13. Information developers are provided with learning opportunities in areas of specialization, including copyediting and style standards, developmental editing, information architecture, publications design, customer analysis, content management, and so on.
14. Publications managers are provided with the opportunity for training in business-oriented strategic planning and other training routinely provided to senior managers in the organization.

Characteristic: Information Design

Activities to ensure that the organization is following the best practices in the industry. Design innovations are regularly introduced based upon research in the fi eld, usability testing, customer studies, and practices learned through exposure to the work and ideas of industry leaders.

Levels:

1	Information developers may design the publications they produce. However, the designs are often heavily influenced by others in the organization, including non-experts in engineering, programming, and marketing. Few or no information design standards are in place.
2	Information developers are fully responsible for the design of their publications, although outside influence may still be a factor. Standards are being developed with incomplete compliance. Some specialization in design and publishing functions may be in place.
3	Information developers are fully responsible for the design of publications, following departmental or corporate standards they have established. Compliance with standards is complete. Specialized functions for design, graphics, editing, production, and others are in place.
4	Information developers, working with teams of specialists, are actively pursuing design innovations and testing these with users. They are aware of industry standards and best practices and compare their work with best-in-class designs. Information developers actively contribute to the design of product interfaces.
5	Information developers are actively engaged in sharing their design expertise with others in the industry and developing and disseminating industry best practices.

Current survey questions

1. Information developers originate the content of the publications or other information products, rather than format content from subject-matter experts.
2. Information developers design the publications or other information products.

3. Responsibility for the full development, including final production, of publications or information products is shared among the technical publications department staff members.
4. For those publications that include illustrations, graphic artists prepare the technical illustrations.
5. Production specialists are responsible for the final copyediting and production for publications and other * information media.
6. Graphic artists prepare and design the publications packaging.
7. The publications staff determines the design and content of the technical publications with input from other parts of the organization.
8. Production specialists prepare final copy and coordinate the efforts of outside vendors (printing, packaging, etc.) and often coordinate translation and localization efforts.
9. PDFs, Help systems, web sites, and other deliverables are designed and developed by the publications staff.
10. Active programs are in place to redesign publications and other information products to better meet the needs of users.
11. Information developers contribute to the content of the product interfaces as integral members of the product-development teams.
12. Information professionals in the organization promote innovation in the design of information products.
13. Information professionals are actively engaged in sharing their expertise outside the organization through publications and conference presentations.

Characteristic: Cost Control

The publications organization has budget authority for its activities and carefully tracks the costs of its development projects. Costs are well understood and regularly evaluated in terms of return on investment and value added. Budgets are defined by the need to achieve a stated level of quality in information products.

Levels:

1	Costs are determined by headcount assigned. Total costs may include printing, distribution, and localization and translation.
2	Publications organizations have assigned headcount. Departmental budget allocations for training, printing, and localization and translation are beginning to be the responsibility of the manager.
3	The publications organization has a budget controlled by the manager who submits budget requests. The organization is active in cost-reduction activities and reports on these activities to senior management.
4	Senior management is well aware of the quality cost associated with publications, through the communication efforts of publication management. Efforts to reduce costs and increase productivity are well received by senior management.
5	Publications managers have instituted a continuous improvement process to reduce costs while maintaining or improving customer quality.

Current survey questions

1. Publications staff are budgeted as part of product development or related organizations.
2. The publications organization is budgeted based on the assignment of headcount (number of staff members).
3. Publications headcount is often the first to be cut during cost control measures.
4. The publications organization has a well-defined budget, prepared by the publications manager, and determined by the estimated workload for the coming year.

5. Requests for additional budget are considered by management as workloads increase.
6. The cost of each publications project is estimated and costs are reported by project.
7. The publications management understands the cost and quality goals of the larger organization.
8. The publications organization initiates projects to control publications costs while increasing or maintaining quality.
9. Senior management is well informed about the cost of publications quality and understands and appreciates the continuing efforts of the publications organization to maintain or increase quality while decreasing costs.
10. Senior management depends upon publications managers to keep costs under control while responding to customer needs.
11. The publications organization regularly initiates projects to reduce costs and increase staff productivity.
12. The publications organization has a formal and thorough procedure for determining the cost of publications.

Characteristic: Quality Management

A series of activities directed toward complete and well-informed definitions of quality, including regular studies of customers' needs, regular usability assessments, regular assessment of customer satisfaction with products, regular assessment of the impact of poor quality on training, support, sales, and others. Strong communication of goals and strategies to senior management and peer managers. Recognition by the larger organization of the value added by technical communication activities.

Levels:

1	No mechanism exists to measure quality of output. Quality is often equated with making deadlines.
2	The publications manager and staff are beginning to investigate ways to measure quality besides meeting deadlines. Customer complaints are addressed.
3	The organization is active in defining, measuring, and managing customer-driven quality. Customers are regularly polled and their issues addressed. Benchmark studies are pursued for the first time. Competitors' information is evaluated.
4	All aspects of customer-driven quality are regularly assessed, including satisfaction with information, calls to support, and complaints. Benchmarking is a regular part of the process.
5	Staff members have acknowledged expertise in the field at defining quality in publications. The organization is actively engaged in developing quality standards in the larger organization. An understanding has been established between the quality of information and the success and profitability of products and services.

Current survey questions

1. The publications organization attempts to assess the quality of publications.
2. The publications organization engages in user and task analysis.
3. The publications organization conducts user site visits.

4. The publications organization responds to customer concerns and customer dissatisfaction.
5. The publications organizations reviews competitor information.
6. The publications organizations polls customers about information quality.
7. A process exists to assess the relationship between information quality and customer assistance calls.
8. The publications organization monitors customer assistance requests and responds with changes in information design.
9. Customer concerns with information are logged and prioritized for response.
10. The publications organization assesses *new* customer requirements and actively responds.
11. The publications organization partners with customers to improve the design of information products.
12. The publications organization initiates benchmark studies of its products and processes with similar publication organizations.
13. Members of the publications organization are leaders in quality management in the larger organization.
14. Members of the organization are well respected for their contributions to quality in the information-development profession as a whole.
15. The link between product and publications quality and customer satisfaction is recognized by senior management.
16. The information-development process is continuously being assessed and opportunities actively pursued to improve both processes and products.

Characteristic: Collaboration

Collaboration defines the practices used in information-development organizations to promote teamwork throughout the information-development life cycle. A collaborative organization works together throughout the life cycle phases of planning, design, development, publishing, and evaluation. Collaboration supports the development of content that can be shared among multiple deliverables and customized for specific audiences. Collaboration promotes the goal of creating and maintaining complete and consistent information for customers. Collaboration extends beyond the boundaries of the professional information developers to a community of information providers that may include training, customer support, product development, marketing, suppliers, partners, and the customers themselves.

Levels:

1	Information developers work independently, designing and developing their content in isolation from other information developers in their organization.
2	Information developers occasionally coordinate their efforts to avoid producing the same content more than one time. They occasionally find opportunities to share content developed by other team members, typically through a manual cut-and-paste process.
3	Information developers are encouraged to form teams to plan, design, and develop content regarding the related products or processes. Opportunities for sharing content among deliverables increases because developers are more aware of the content being created by their colleagues. Developers frequently form self-organized and managed teams to jointly produce a robust result.
4	Information developers regularly engage in collaborative processes that include planning, design, development, and review. Team members trust and respect the work of colleagues, believing that together they can build superior products to those that they can build individually. Project managers and team leads facilitate collaboration as a core business practice.
5	Information developers regularly collaborate with colleagues from other parts of the organization and outside the organization as appropriate, encouraging a free flow of information and frequent interactions. They are continually looking for new opportunities to collaborate. At the same time, they find ways to avoid constant meetings that threaten to bog down progress. As professional communicators, information developers help foster communication among colleagues who may not be as effective as communicators. They work together

	to develop new ideas that are greater than the ideas offered by any individual team member or domain expert along.

Current survey questions

1. Information developers work together to plan the content for a set of related deliverables.
2. Information developers use content developed by others information developers to create their deliverables.
3. Information-development teams to plan, design, and develop content are a standard part of the process for planning and developing content.
4. Information-development team members trust and respect the work of colleagues, believing that together they can build superior products than they could individually.
5. Information developers regularly foster collaboration with from customer support, training, marketing, and others who understand customer requirements, encouraging a free flow of information and frequent interactions.
6. Information developers have adequate tools and physical facilities to support collaborative efforts among team members and with others in the organization.
7. Management supports our efforts to increase collaboration in information development activities.

Characteristic: Change Management

Mature organizations engage in continuous improvement, requiring a high degree of skill in managing change. With sound change management skills in place, organizations increase the likelihood that innovations will be embraced. Managers promote the business and personal values associated with innovation and help team members understand the benefits that innovation will bring even when requiring changes in work practice.

Levels:

1	Information developers have no mechanism available to foster change in their practices or design. Only personal persuasion and the practices of interested parties may help changes to occur.
2	With new consolidation of individual information developers into groups led by a professional manager, change becomes an integral part of achieving process maturity. In fact, change is at the heart of a Level 2 organization. However, since change is new and everything is changing, managers at Level 2 may not have developed a protocol supporting best practices in change management.
3	The information- development manager has introduced a change-management protocol to the organization in hopes of consolidating gains won by achieving Level 3 of process maturity and providing a mechanism for introducing additional change.
4	Managers have integrated change management best practices into the organization so that all team members understand what they need to do to foster continuous change. Communication about change is an integral part of the organizational culture.
5	All team members are able to manage change within the organization and to work with colleagues in other parts of the larger community to foster change.

Current survey questions

1. Changes are reactions to outside events and pressures.
2. The information development manager initiates and effects changes without the participation of team members.
3. The information development manager initiates and effects changes with the full participation of team members.
4. Changes initiatives are carefully planned to ensure acceptance and success.
5. Information development managers actively encourage team members to recommend innovations that require change management.
6. Changes are accepted by team members because they have participated in the change management activities.