

CPD example 2

Amira, a technical communicator in a small organisation

| Activity | Points |
|---|-----------|
| Year 1 | |
| Has been asked to help with the promotional material for the product. Investigated the different requirements for promotional writing as opposed to the instructional writing she is used to. 18 hours spread over a number of weeks, including reading articles, blogs, and attending a short marketing webinar. | 18 |
| Delivered an in-house session on 'writing for your audience' to help customer service staff when replying to email queries. 2-hour session, with practical exercises. Took 8 hours to prepare. | 11 |
| Read a blog post about the use of wikis for internal documentation. Further investigation followed, leading to a proposal to the business. Time – 3 hours. | 3 |
| Underlying technology changes mean there have to be changes to the way the user assistance is delivered. Opportunity taken to identify any changes to 'best practice' and to suggest improvements. Online investigation by visiting vendor websites, reading blog posts and raising the issue with fellow ISTC members on the discussion group. Total time – 5 hours. | 5 |
| Year 2 | |
| Got the go-ahead to change the help authoring tool and to convert existing material. Need to identify the best technology and also determine how best to organise the project. Difficult to quantify as some could be seen as part of "normal work" ¹ , but the learning was identified retrospectively: what had been learnt, what would be done differently another time, what were the major issues... This led to a longer period of thinking (and a longer written reflection). | 8 |
| The organisation is expanding and Amira needs to recruit a new technical author, whom she will manage. She has never managed anyone before, and has a long discussion with her line manager about what this will entail. She also makes use of the ISTC discussion group again to find out what others feel are the important things to look for in a (relatively junior) technical author. | 2 |
| Devised an induction programme for the new employee. He has worked in customer support so has a good appreciation of the needs of users in general, but does not know the product suite and is not an experienced technical author. | 5 |
| Discover that one of the technical team is colour-blind and investigates what can be done to help. This leads to more general investigation into accessibility issues (blogs, articles, websites), resulting in changes to the style guide. Although updating the style guide is routine work, the investigations result in learning. | 8 |
| Total for both years | 60 |

¹ Each time you document a new product, you can't class the decisions you make as CPD, or your whole working day would be one long CPD experience.

Evidence to support the claim of 3 points for investigating the use of wikis for internal communication of technical information

Amira can provide the following evidence to support her claim that she has learnt something about using wikis for internal documentation:

- A link to the blog post that started it all:
<http://idratherbewriting.com/2007/06/26/wikis-in-documentation-ann-gentle-asks-can-wikis-stand-alone-or-must-they-be-supplements-only/>
- Some links from the follow-up investigations including:
 - ♦ <http://annegentle.wordpress.com/2007/06/26/wiki-research-for-an-article-about-tech-pubs-and-wikis/>
 - ♦ <https://wiki.ucop.edu/pages/viewpage.action?pageId=6489086>
 - ♦ <http://www.cherryleaf.com/consultancy-services-in-user-assistance-and-documentation/developing-content-for-confluence-and-other-business-wikis/>
- The proposal to the business, with confidential information redacted. (Amira obtained permission from her line manager to include the proposal in her CPD record, which is providing evidence that learning about the subject matter took place.)

This is only a claim for 3 points, so Amira may simply write a few sentences in support of her claim (up to the end of the first paragraph below). She may need to write a little more if she does not obtain permission to incorporate the proposal (or at least a portion of it) into her CPD record.

I had only really heard negative things about using wikis for documentation, so was surprised by the initial blog post, which I found by accident when I was looking for something else. We've been having discussions internally for some time about the need to keep the support documentation up-to-date – it's just one thing too many for me to keep updated, especially as the time that it needs updating is in the final sprint up to and just beyond a release.

I hadn't thought of using a wiki for this, but they do seem to solve a lot of the problems:

- ♦ Central repository, so everyone doesn't end up with their own copies of material that they annotate themselves.
- ♦ Supports short-term 'work-arounds' – while waiting for a patch release – that can easily be updated.
- ♦ Captures complex steps that only need to be followed very rarely so aren't in the user documentation.
- ♦ Can be created and edited as a problem is solved, making sure latest details are available.
- ♦ Can upload mini videos to show details.
- ♦ Full audit control – can see what was there before changes were made.
- ♦ Support staff can create and edit the content themselves – no asking me.

Evidence to support the claim of 2 points for preparing to recruit a new employee whom Amira will manage

Amira can potentially provide the following evidence to support her claim that her preparation to recruit a junior technical author is valid CPD:

- A link to the discussion on the ISTC discussion group.

This is a small claim – Amira only needs to demonstrate that learning has taken place:

I asked the ISTC discussion group for advice to find out what I needed to look for in a new technical writer, as I'd never hired anyone before. The majority advised that the ability to communicate outweighed proficiency in any particular tool or subject matter knowledge, although these may be more important in some areas. After discussion with my line manager, we agreed that I'd find it difficult to teach the communication aspect if the person didn't have some skill in that area. I could get help from the SMEs for subject knowledge issues, and I could support someone in using the authoring applications, so they were less important. Based on this decision, I drafted some questions for the interview that would help identify suitable candidates.

I also discussed the different aspects of 'managing' with my own manager, as this is new to me. I am going to be managing the day-to-day workload of the new author; my own manager will manage reviews and so on. Delegating is going to be an issue – I need to 'let go' but keep an overview, and I can see this being a bit of a balancing act. Got a lot of advice on keeping light touch-points, making sure things are generally on track without wanting a blow-by-blow account and so on. We agreed that I'd have regular meetings with my own line manager to discuss how things are going once the new person has been appointed.