

# CPD example 3

Susan, a freelance technical communicator

Activity	Points
<b>Year 1</b>	
New project on the horizon using RoboHelp, which was originally written by another freelance author but is now managed in-house. Susan is being engaged to “sort out” a few issues and leave the project in a suitable state for in-house maintenance to continue. Susan has only ever seen this tool demonstrated before, and needs to learn how to use it before the project starts. Identifies free online training sessions – 4 sessions, each 1 hour long.	4
Having downloaded a trial of the software, Susan creates a mini-project and transfers some existing material into it to get a more realistic view of it. Quickly identifies how she is going to have to adapt some of her usual workflow – which is learning that can be used on other projects, too.	8
Starts the new project and discovers that the two other “technical authors” on the team are actually a junior developer and someone from customer service who have been seconded to the role. The first day is spent discussing the plans for maintaining the system after Susan’s contract ends, and results in devising a few training sessions covering specific topics (both tool and good-practice based). Susan delivers a total of 5 2-hour sessions covering some of the principles of technical communication and some aspects of the tools.	15
<b>Year 2</b>	
Susan provides on-going support for the duration of the project (averaging 1 hour per week unofficial “mentoring” for a 3-month period).	12
The day centre attended by Susan’s son is having a fund-raising open day. Susan has been asked if she will help to update the website with information about the event, and she notices some problems with the way the information is structured on the site, making it difficult to follow. Susan quickly finds that some of the things she feels are “obvious” aren’t to the person who normally updates the website, and wonders whether the same issues might arise in her current work-based project, with similar results. Concrete examples help the day centre, and Susan transfers the concepts to her work-based project.	2
Decided to write an article for <i>Communicator</i> based on the recent project, explaining how to support non-technical communicators who have to fulfil that role occasionally.	10
Read an article in <i>Communicator</i> , and read the book on the related topic that had been reviewed. Presented the concept to her current clients as a possible alternative to their current information delivery method.	10
Attended a webinar by HMRC on self-assessment and VAT. (Manages her own business accounts, and is relevant to her business as a freelance technical communicator.)	1
<b>Total for both years</b>	<b>60</b>

## Evidence to support the claim of 8 points for experimenting with RoboHelp

Susan can provide some tangible evidence to support her claim for learning to use RoboHelp through experimentation: the sample project she created (assuming it does not contain anything confidential). If she cannot provide any tangible evidence, the reflective writing will have to provide it all.

Susan made notes as she went along (which she kept as evidence, although they may make little sense to anyone other than herself), and summarised her findings in a 'learning journal' over a period of time.

2 August

Downloading and installing was relatively straightforward. For some reason, it doesn't like my version of Word, so I need to do a bit of investigating here as some of the output is in PDF format, and I've read I can use a Word template to format it.

I like some of the features, but we need to have consensus on how we use them. In the existing help, I've seen a lot of them used, but sometimes very inconsistently. Extra information is provided in expanded sections that appear when you click or hover, but sometimes this is high-level conceptual information (in the middle of a task!) and sometimes it is the 'novice steps' that people won't need when they've been using the software for a while. I suppose at least it's always 'supplementary' information.

Conditional text is going to be really useful, as will the ability to create multiple tables of contents in the same help file – will go some way towards single-sourcing.

10 August

I copied some of my own writing skills training modules into RoboHelp so I could see how it all fits together. It works really well, and I may use it moving forward. It is certainly an easy way to use core materials and supplement them as necessary.

Even doing this myself – the only person using the application to update materials I am very familiar with – I found myself using different techniques in different places. I can see how the client's help files got in such a tangle – no doubt the original author had a very clear idea but everyone who has touched them since has changed them in different ways. Need to add a 'use this technique for this information' section to the style guide.

The sample project has been saved as 'evidence', and I've also created my own guide covering the decisions I've made as I've gone along for my own project. Table of contents was quite straightforward but I'm still working on the index... I need to learn how to do it for my client's material, but it's less relevant for mine so motivation is low.

15 August

I've published my project in a number of different formats, and have modified the templates to match my own business style (colours, logo, etc.). I'm really pleased with the results, and have a long list of things I must consider when I start to import the client's material.

## Evidence to support the claim of 10 points for an article written for *Communicator*

Susan has all the examples and materials she used when delivering the training session the previous year, and she can refer to these as part of the secondary evidence for this claim. She cannot claim points for developing the materials or for delivering the training – she has already counted those for last year.

The current claim is for the writing of the article, sharing her experiences with others and potentially helping and encouraging them to do the same. The main piece of evidence for this claim is the article Susan wrote, which outlines clearly what she learnt from the teaching process and some of the rationale behind the choices that were made.

Additional evidence could include any drafts, any notes she made, any plan and so on.

The final piece of evidence is the reflective writing, which primarily covers the learning that isn't otherwise covered by the evidence.

Until I wrote the article, I hadn't really sat back and taken stock. What had worked and what hadn't? What would I do again in the same way and what would I do differently?

I did a little bit of background reading before writing the article (references are in article) – nothing too deep, but there's a lot available on the internet... and I wish I'd understood a little more about the different ways people learn before I started.

If I'd taken the time to investigate a bit more thoroughly, I'd have made sure each session covered the bit of communication theory and best practice guidance and I'd have tied it in more closely to what we were doing with the tool on that day.

When I delivered the training, I had a list of topics to cover and I tried to organise them logically – but in practice this meant that some sessions were very theoretical, where I was giving examples of how to structure something in a language sense and was trying to think up examples to illustrate the point, and some were very tools-focused ('this is how you do tables' and 'set up numbered styles like this'). Linking the two elements together would have been much better for both me and the people I was training. I could have used their own documents more, identifying sections that needed rewriting and getting them to do it, covering all aspects in one go.

Getting all of this down in an article wasn't easy either. It took me quite a while to sort out what worked well and what didn't. At first, it was starting to sound like a straightforward description... then when I realised what I could have done differently, it became a list of things that went wrong. It took a lot of thinking and reflecting to sort out exactly what did work, and where the issues were. Hopefully the article will help others avoid the same pitfalls.