CPD example 4

Martin, a manager of technical communicators

Activity	Points
Year 1	
Studying for an MBA – and the current modules have a strong people and project management element. Martin supports his formal study by reflecting on how managing technical communicators and technical communication projects fits into the theory he is learning.	30
Year 2	
Staff appraisals are imminent, and in reviewing some work samples, Martin spots an effective way of presenting information of a type that often causes problems. He discusses this at length with the author during the review process, and then supports the author in sharing his technique with the rest of the team.	5
Martin is sent on a managers' 'away-day' for work. While there, he realises that some of the interviewing and facilitation techniques they are covering would work well for getting information from SMEs.	2
Martin reads *Communicator* every quarter – and this issue the 'ethical dilemma' is similar to something that has recently arisen at his place of work. Martin spends some time thinking about the issue, and writes a response.	6
Read a thought-provoking article in the *Guardian*. Followed up with some online investigation.	3
Regularly reads some technical communication blogs, and over the course of the year[1] identified 6 blog posts that caused him to stop and think more deeply about some issue, and lead to further reading.	6
Attended Technical Communication UK for one day, as the specialist stream speakers on that day seemed particularly relevant to his company's projects.	8
Total for both years	**60**

Evidence to support the claim of 5 points for reviewing the work of another technical author

Martin can provide some evidence of the learning:

- He can either take an extract from the work he reviewed or create an example using the same method.
- If Martin did any research of his own prior to the review meeting, he can provide those references.

[1] These could be recorded as separate episodes (it depends how closely they are related)… but for the purposes of this example, it's easier to record as one.

- Martin may keep copies of any notes he makes on suggestions or comments on how to share the method with others.

Martin must *not* incorporate anything from the appraisal itself – that is confidential to the member of staff being appraised.

Martin records his reflections as soon as possible after the learning event, and sometimes revisits them later – especially if he has learnt some more on the same topic:

> 25 July
>
> We've struggled to convey this information so many times – and Peter [the staff member] has come up with a really ingenious solution. He said he thought about it after creating a Captivate simulation for the training department, when he didn't want people to have to sit through the revision material if they had answered the questions correctly.
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> The problem is usually that there are so many options, and we are either swamping our users with details they don't need in their case or missing out vital bits of information when they do. We've tried breaking the information down into small chunks so that people only see what they need – but we get complaints that it's "all over the place", and there is nothing to hold it all together.
>
> Peter's way of creating a customised path through the information from the options people are using that remains visible is really good. It gives people a start point, an end point and a process flow that makes sense in their environment. There are a few technical issues – and I am going to talk to the web development team to see if there's a better way of storing someone's chosen path so it's there waiting the next time they visit this section of the help.
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> I asked Peter to share his technique at our next team meeting. It's going to be relevant to the other authors working on the same project, but I can also see how it could influence the two other major projects we're working on right now.
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> 29 July
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> Peter and I discussed what he was going to present. We discussed how using a 'before and after' example might help. Peter wanted to know if he should create a PowerPoint presentation for the session… and we discussed the reasons why this might and might not be a good idea. We returned to first principles: what was Peter trying to say? After some thought, Peter decided that one or two slides to show some screenshots of the 'before' would be useful – he could take them from the current live version – but that the 'after' would be more effective shown as a real life example. He then would follow up with one or two slides that showed the stages in the process, but would make a copy of the finished system available for others to play with later.
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> 31 August
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> We released the beta version on Monday – and we asked our beta sites for feedback on the configuration help. So far it has been really positive, with a couple of suggestions for refinement.
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> We've had to reconsider using this everywhere… there is quite an overhead in setting it up, and you need to have a clear understanding of what people want to do (with very few exceptions) or it becomes unworkable. It's a valid technique for the area Peter first used it, and for the a few other places… but in some areas the overhead isn't worth it either for us or for the customer (it takes them time to filter out what they don't want, and if they aren't gaining much…).
>
> I think I might write this up for *Communicator* at some point, though.

Evidence to support the claim of 6 points for responding to an 'ethical dilemma' in *Communicator*

Martin can provide some evidence of the learning:

- A copy of the response as printed in *Communicator*.
- A copy of the material he submitted – it may not be published, but that doesn't mean Martin didn't learn anything. It is also useful to take a copy of what you submitted in case it is modified during the editing process (it might make a better article, but may remove some of the 'evidence' you need).

In addition, Martin writes a reflection on the issue:

> Read an article in *Communicator* over the weekend. They could have been writing about this place! Almost exactly the same thing happened just over a month ago – but I hadn't even registered it as a dilemma. The article really made me stop and think… I had just dealt with the issue as part of my job, but hadn't even considered that there could be more at stake than simply deciding whether to do what the client (a reseller) wanted or not (which felt like a no-brainer at the time).
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> I found myself revisiting the issue over and over again during the course of the weekend, and first thing Monday morning I looked back through my email trail and read the relevant messages with fresh eyes. There were so many indicators there that many of the reseller's staff were uncertain that what was being asked for was right – they obviously felt uncomfortable and were unable to ask outright, but what I originally took for "politeness" (for example, "if you think it would be a good idea" and "if you believe this would work for our customers") were possibly them feeling unsure of their ground.
>
> Now the seeds of doubt had been sown! I spent a little bit of time on Monday morning looking at how we had restructured the document… did it work? Had we – in doing what our client wanted – compromised our integrity and made things worse for the end-users?
>
> It is difficult to be sure – we haven't had any end-user feedback, and even if we had there was no 'original' for comparison. I believe that the structure we had originally was slightly better – but the client's preference was 'different' rather than 'wrong'. More by luck than judgement, though!
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> I can also see – with hindsight – what they were trying to do, and there was another alternative that would have met their requirements *and* would have optimised access for the end-users.
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> I decided to write a response for *Communicator*. Maybe someone else would learn from my lucky escape… and I've learnt to *always* ask the question 'Why do you want to do that?'