

# White Clarke Group

10 to Midnight

Solve the Last-Minute Rush

□ David Bailey



# David Bailey



- ▮ Lead Information Architect: White Clarke Group (WCG)
- ▮ Technical communications for 25 years
- ▮ Working at WCG for 4 years
- ▮ Leading the IA Team (3 members)

# Agenda

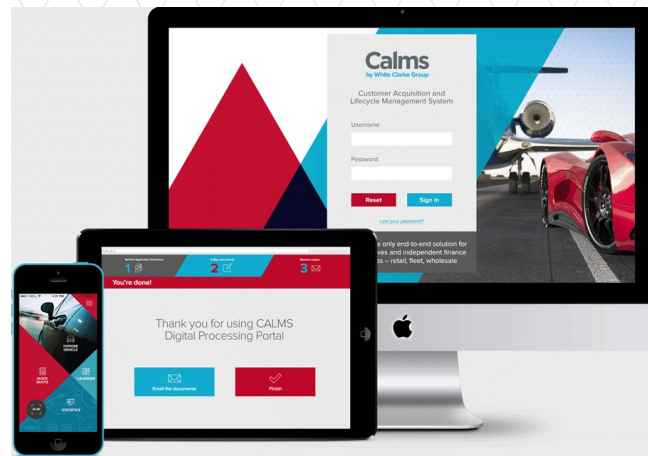


- Background: White Clarke Group (WCG)
- Problem: too much, too late
- Our solution: user-generated content
- Benefits, lessons learned and ROI
- Becoming Information Architects

# Background: White Clarke Group (WCG)



- CALMS: Auto / asset finance software
- Customers and staff worldwide
- Different languages, cultures and regulatory regimes

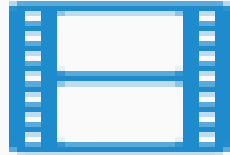


# Background: Documentation at WCG



- Since 2016, moving from customer projects -> standard product
  - Growing product documentation set
- Hybrid Agile / Waterfall development cycle
  - 2-week development sprints, releases every 2 months
- Small team of tech writers (now Information Architects)

# Problem: Too Much, Too Late



*“Why do we  
have to cut  
these things so  
damn close?”*

Michael J. Fox, Back  
To The Future III

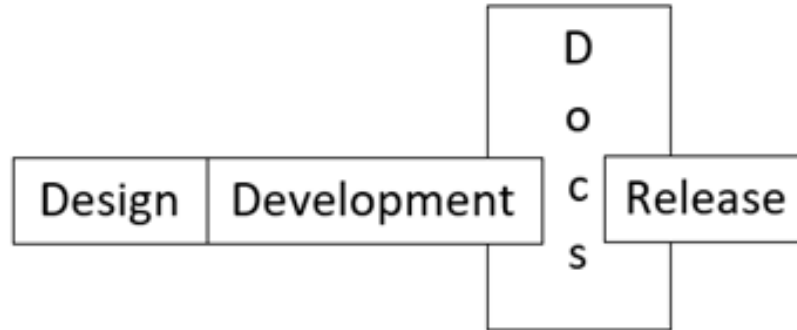
# Problem: Too Much, Too Late



□ Theory



□ Practice



# Problem: Too Much, Too Late



- 10-page “Release Notes” -> 200+ page “Release Guide”
- Increasing resource demands - docs rushed / late
- “Cast your mind back 2 months” problems





# Why Not Agile Assimilation?



- Why not embed a writer in each development team?
  - Most companies spread TWs out over several Scrum dev teams
  - Large overheads, less productivity
  - Scrum methodology is not clear for writers
- Needed a change in process.

# Our Solution: User-Generated Content



- Get SMEs to write the content
- Get them to do it earlier, during design phase
- We use:
  - **Confluence**: provides a Wiki-based collaborative environment
  - **Automation**: infrastructure to create forms to fill in
  - **Process**: embed work into the Design Docs requirements
  - **Training**: we train all content writers (business and technical)

# Our Solution: IA Involvement



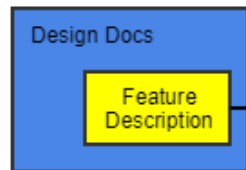
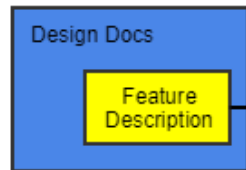
- We make the process work
  - Management
  - Review and Editorial
  - Support and Training



# Our Solution: Feature Descriptions

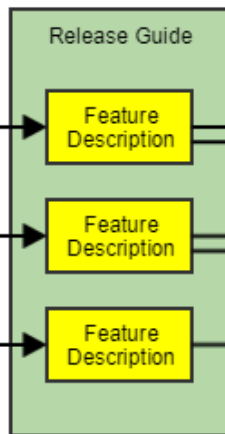


Internal Docs

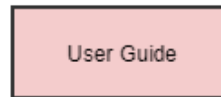
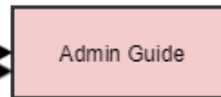
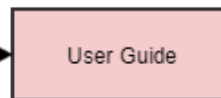


Confluence

External Docs



Confluence



Flare

# Our Solution: Feature Descriptions



- 1:1 relationship with each JIRA change in the release
- Automated history / versioning
- Form-based metadata for tracking
- Automated template structure to fill in
  - **Overview**
  - **User-facing details**
  - **APIs**
  - **Configuration**

# Our Solution: Feature Descriptions



History: built-in Confluence

Metadata: automated form

External content: the words

### Activation - Feature Description

Created by David Bailey on May 29, 2019

#### Page properties

GAP ID	Func-Gap-012
CALMSBACKLOG	<a href="#">CALMSBACKLOG-556</a> OPEN
Status	COMPLETE
FD Author	@Jamie Mallia
Reviewed By	@David Bailey

NOT STARTED > IN PROGRESS > REVIEW > COMPLETE || BLOCKED

\* It is the job of the FD Author to check with Product Management to ensure the change

#### Overview

This change implements activation messages sent from CALMS FMO to CALMS Back-Office.

⚠ For this release, the change is limited to only invoke the activation message.

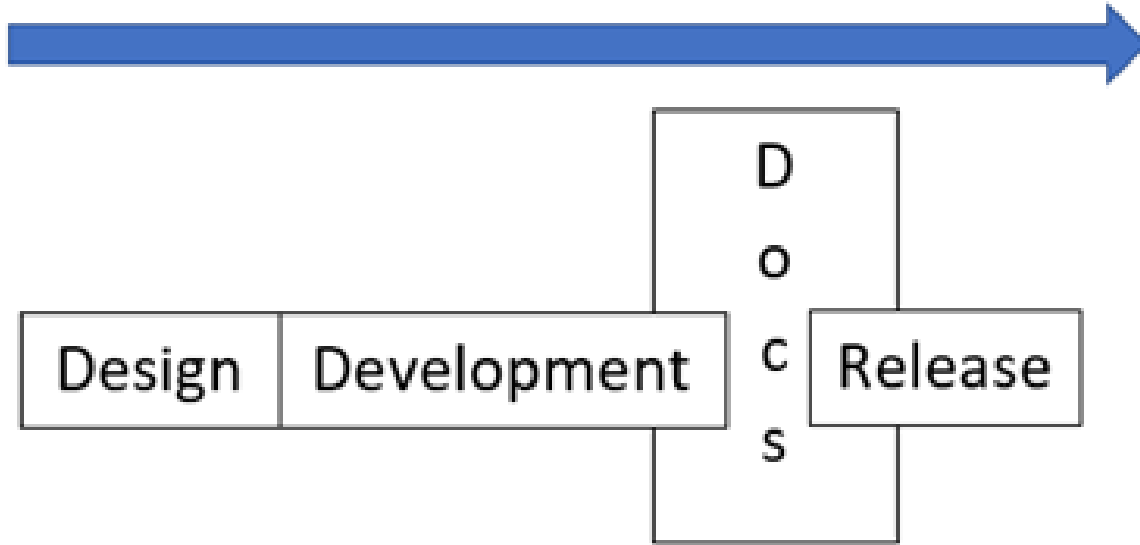
#### FMO Details

When the Activation action is taken, the CALMS 2 CMS activation message is invoked.

# Our Solution: Theory



# Our Solution: Old Practice





# Our Solution: New System

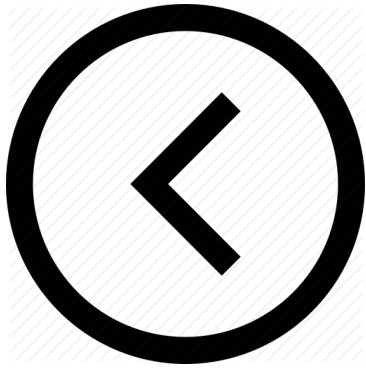


# Our Solution: Results

- It works:
  - Docs are owned and maintained by SMEs
  - Release and Product docs for each release
  - Hundreds of pages of new content every two months



# Our Solution: Benefits



- Productivity (“Shift Left”):
  - Deliver more content
  - Deliver it earlier
  - Increase knowledge-sharing
- Ownership:
  - Spread responsibility / ownership
  - Use SME expertise
  - Higher-profile documentation (work and team)

# Lessons Learned



- Ensure initial **and** continuing management buy-in
- Change is slow and difficult process
  - Make process and technology as easy as possible
  - Deliver training and documentation to sell the process
  - Take on a support function
  - Accept that “there’s always one...”
- Embed documentation in all job role descriptions

# ROI



- Nothing is free: ROI needs “I”
  - Investment in tools and training
- Company culture change
- Our IA team skills change:
  - **Editors**
  - **Trainers**
  - **Project Managers**



# Becoming Information Architects



- The IA team does not own content
- They do own structure, process, culture, tools, training, support, publication, distribution, standards
- They become Information Architects: curators not creators
  - (We still do writing!)



# Summary



- We did not accept that things needed to be cut so close
- We changed the system:
  - “shift left”
  - SMEs create content
- Our solution works for **us**, at **this** time, for **this** process
- We need to promote, educate, support: a continuous process

# Questions?





Thank you

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