Documentation – Maximize Team Effectiveness and Extend the Investment

Too often documentation is missing from the deliverables of major change initiatives. With continuing pressures to shorten project timelines and increase profits – project teams, software vendors and business leaders regularly modify or eliminate the effort spent on documentation to reduce time and expense for the overall project.

When documentation has been created for a new process or toolset, it frequently misses the mark and is not useful for the intended audience. Writing down every detail about a software tool or key business process does not mean it has been well documented. It just means that the raw data required to start the creation of good documentation has been collected. Well done documentation eases the challenges of change and adds to long-term project success. It presents information in a manner easy for the reader to absorb, understand and act upon. Its goal is to improve performance by educating users and decision makers on system capabilities or process step details.

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The Value of Documentation: A Collection of Best Practices

Documentation should represent the collective wisdom of top performers in the company coupled with the insights of external experts. If the intended target of the documentation is open to learning, then improved performance, higher job satisfaction and profit improvement are sure to follow.
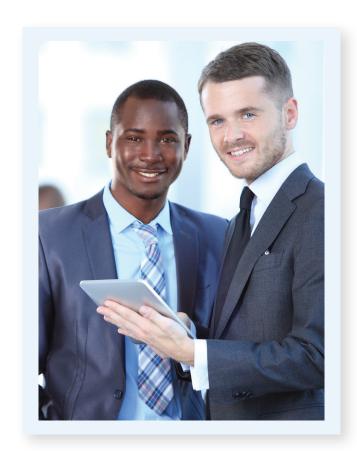
The chances of new processes or tools being used correctly across the enterprise are enhanced when using good documentation. Consistent execution of best practices is often the quickest and most cost-effective way to improve bottom line results. Accurate, organized and interesting documentation can improve process consistency if it is part of an effective overall communication plan.

Plan For It

Allow for the creation of top-rate documentation when project planning. Often when faced with many project tasks such as classroom training sessions, quality assurance testing and stakeholder communication – documentation efforts fall to the bottom of the priority list. Without creating distinct documentation tasks in the project plan, documentation may find itself cut from team efforts to meet project deadlines. In reality much of what is already done for training, testing and communication may be considered part of documentation. Component content pieces may contribute to several end products. When seen in the overall context of prepared written material, these interdependent tasks should leverage what has been decided and recorded across the tasks. It's all in how the material gets used.

Get Organized

Documentation should be well organized, written in terms familiar to the users, and easy to understand. Just as collection and availability of key data do not in themselves make it useful information, documentation must be thoughtfully presented and organized to provide value to the user. Organizing content along functional topics and business scenarios enables users to easily find answers to common business questions. Online documentation affords additional opportunities to organize the information in ways that enhance the usability. A context specific subset of information perfect for the reader's needs can be quickly presented by leveraging drill-down and search capabilities of online documentation. Issue resolution tips and suggested screen workflow can also be included with online documentation, further guiding users on how to improve performance.

Be Creative and Entertaining

Use several types of media when creating the best documentation. While the written word is most often used, the use of graphics, screenshots or video clips yields an improved visual variety and may assist the audience to quickly understand difficult concepts where visual cues can be effective. Frequent examples are recommended for the best documentation. Different people learn in different ways. Some people can absorb and understand a concept more clearly when visualizing the actions of others.

Make Easily Accessible

Inject documentation into the new tool or process whenever possible. Consider creating small cheat sheets, posters or custom sticky-notes to get key messages in front of users early in the change process. Leverage documentation during classroom training sessions. Intersperse exercises throughout the document to encourage users to follow along and make notes during classroom training. When users make personal notes in a document, they feel a greater sense of ownership and incorporate it into their daily work routine. Incorporate online documentation into software applications whenever possible. This enables the knowledge capital to be easily accessed when needed the most. The search and drill down capabilities of online documentation helps users quickly pinpoint the information needed to be successful. Updates to online documentation do not require costly reprinting and distribution expenses common when updating paper documentation.

Test It

Pilot documentation, just like you would pilot a software solution or classroom training prior to company-wide rollout. Learn how the users leverage documentation in their daily routine and how the initial draft can be enhanced to better meet their needs.

Reference It

When users question how to use the new tool or process, instead of answering their question verbally, point them to the specific area in the documentation that explains the best practice. Ideally, the troubleshooting section already references their question and suggests a course of action to fix the issue. This way, the user community learns how to solve these issues on their own – speeding resolution time and improving morale.

Invest in Top Rate Documentation

Placing the appropriate focus on documentation enables users to fully employ new tools or processes consistently over time. The further away from the implementation of a new system or process, the more important that documentation can be to newcomers to the function. It can be one of the critical components of projects that help to ensure ongoing success.