The changing nature of content

Executive Summary

- Some organizations are changing the way they write User Assistance, and are, for some content, not using the generally accepted best practices.
- Through web analytics and other measures, organizations are reporting a noticeable benefit from making these changes.
- The reason for making these changes is due to people's relationship with technology changing, and a desire by organizations to deliver better forms of User Assistance.
- However, there is no one right answer, you will need to experiment to see what works best for your organization.

Introduction

In recent years, technical communicators have focused on improving User Assistance through new technologies and systems, with the assumption that the nature of the content, the tone of voice, the writing style should remain the same.

In this white paper, we'll investigate whether the tried-and-tested writing methods from past decades still make sense today. We'll look at the reasons why some organizations are "breaking the rules" with the User Assistance they provide.

The traditional approach to writing technical documentation

While there have been huge leaps in the technology used to create and publish user documentation, it's been quite a while since there were any significant changes to the writing style in technical communication.

The xml.org website, in its pages on the history of DITA\(^1\) (a structured authoring standard advocated by IBM, Nokia and others), provides a rough timeline for technical communications standards.

The key milestones were:

- 1961—Quick Reader Comprehension (QRC)
- 1963—Hughes STOP (Sequential Thematic Organization of Publications)
- 1967—Information Mapping
- 1974—SGML
- 1982—Information Types
- 1990—Minimalism\(^2\) and task-orientated instructions

We can see from this the writing style has essentially remained the same for more than 20 years.

As for DITA itself, it is true to say it is a new standard – it was introduced in 2002 and approved as a standard in 2005. However, DITA's focus is on structuring and organizing information around Information Types such as task, concept and reference. We could argue that DITA is a way to apply the minimalism style of writing.

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\(^1\) [https://www.oasisopen.org/committees/dita/faq.php](https://www.oasisopen.org/committees/dita/faq.php)

The Technical Writer’s relationship with the reader

Professor Stephen Pinker\(^3\) has argued that when we use language to communicate, we are indirectly communicating a relationship between two parties. For example, a Technical Writer could write as if they were an adult speaking to another adult, or as a parent speaking to a child.

In most situations, Technical Writers adopt a formal tone of voice that is, in most cases, unemotional. The message is mostly authoritative (“Do what I say and you’ll be OK”). They use a dominant instead of a submissive tone of voice.

For many years, this approach to writing technical content has served our audiences very well. Technology has been traditionally expensive, a little bit intimidating, with people afraid of breaking it, and the dominant, succinct approach to writing has provided authoritative, reassuring information.

This approach to writing has many strengths: the information is typically easy to understand, unambiguous, translatable and accurate. It was developed (and is still good) for situations where safety and risk reduction are important, and when the audience is anxious. It also suits situations where there is a hierarchical, command and control culture, such as in a retail bank.

We’ll investigate later whether this approach is still appropriate when people’s relationship and attitude toward technology has changed dramatically.

The traditional model for User Assistance

Today, we have a model for supporting users that looks roughly like this:

Typically, Technical Writers write content for a “body of knowledge”, courseware developers create training materials, and users generate their own content about how to master a product.

These tend to be discrete “islands of content”: when users want to do more than just apply what they know, they tend to use the Internet – places such as YouTube and user forums - to learn, debate and make suggestions; Technical Writers create online Help, screencasts or printable user documentation; courseware developers create classroom training courses or elearning material.

This matches roughly with popular learning models (Bloom’s taxonomy of learning\(^4\) and Kirkpatrick’s learning evaluation model\(^5\)), suggesting Technical Writers are enabling users to understand and apply their knowledge (the conscious competence and conscious incompetence levels in the diagram below). Resources are targeted to deliver that value as effectively and efficiently as possible, eliminating ‘waste’ in the process. The result is greater emphasis on providing the value customers are willing to pay for while in many cases being able to simultaneously reduce cost.

\(^3\) [http://www.youtube.com/watch?feature=player_embedded&v=3RwIZTg_Rs](http://www.youtube.com/watch?feature=player_embedded&v=3RwIZTg_Rs)


Why change? The weakness with the current approach

If you ask an audience of Technical Writers if anyone has told them “No one reads the manual”, you’re likely to watch a sea of hands go up. User documentation is often criticized for being boring, old-fashioned and unread.

Our changing relationship with technology

In the past, a lot of technology was unfamiliar, idiosyncratic, expensive and complex. As technology has become part of everyone’s daily lives (particularly web and mobile applications), people’s relationship with a great amount of technology has changed. Today, people often regard technology as something that “just works”. When it doesn’t work, they’re more likely to throw it away than try to fix the problem. In other situations, when it does work, they’re inclined to tinker and make it do things the manufacturer never intended.

As a consequence, for some types of products and for some types of documents, the traditional approach for technical writing is no longer appropriate. Studies have shown that when people are anxious, they will pay attention to people who are authoritative and trustworthy.⁶

When a building is on fire, you look for the person who is telling people where to go. The problem is that when people are not anxious, if they’re simply performing some daily mundane task, this approach just doesn’t grab people’s attention. In that situation, when we see someone shouting and pointing in the street, we tend to avoid them.

This means, for today’s audience, the traditional approach to writing content can seem somewhat flat. For some products and situations, being formal, unemotional and authoritative may no longer resonate with the user.

A new model for User Assistance

We believe there has been a change in the relationship between people and technology, and there needs to be a corresponding change in the relationship between people and the user documentation.

Removing waste from user documentation

Lean focuses on stripping out waste – if something does not add value to the customer, it is eliminated. Using the three original types of waste, Lean can also help us identify potential areas of waste in the documentation from the user’s perspective:

We still need technical communication

Even for the simplest, most intuitive of products there is still a need for User Assistance. The organization still needs to:

- Explain unfamiliar concepts. People still need to be introduced to new technology before they feel comfortable using it.

⁶ http://boxesandarrows.com/emotionaldesignwithactpart1/
• Explain how to tinker and hack.
• Differentiate its product from its competitors, and help keep it from becoming a commodity. Organizations accomplish this by adding additional functionality and by adding value beyond the product’s features and capabilities. This could be by creating a brand image users can associate themselves with or developing a relationship between the user and the company or product.

Creating a positive relationship with the user

Today, customers have a voice via social media sites such as YouTube and Twitter. What we’ve seen with the explosion of social media is that people want to be listened to and to share their experiences. They love having conversations: a two-way dialog.

According to Anne Gentle, author of “Conversation and Community: The Social Web for Documentation”:

“The technical communication world is on the brink of a major cultural shift from one-sided ‘documentation’.”

By giving users useful, usable and pleasurable experiences, this shift promises to result in more positive relationships with our customers.

Developing an integrated model for learning, User Assistance and mastery

We and others, such as technical writing consultant Ray Gallon, have proposed that organizations should develop an integrated model for learning, User Assistance and mastery. Instead of the three “islands” (of the discussion forum, a body of knowledge and training) there should be integration between them. This leads to a community of stakeholders, of both customers and suppliers, contributing valuable information. The new model for supporting users would look roughly like this:

A cognitive design for User Assistance

Content from users’ questions would be fed back into the User Assistance and training, and users would be referred to the relevant content in the body of knowledge.

Using psychology as well as technology to provide effective User Assistance

With technology now so much a part of our daily lives, is it time to make our supporting product information reflect more closely our users’ feelings? In other words, can we use the psychological effect of words and images to improve User Assistance?

This means Technical Writers need a better understanding of the psychology of users, and understand how they can relate and communicate to users in context.

We are not suggesting that the traditional approach to technical writing should go away completely. The traditional model still works where users are anxious and where risk and safety are important considerations. We’re also not arguing against technology such as XML and DITA—these are vehicles for

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2 http://humanistnerd.culturecom.net/2013/02/06/acognitivedesignforuserassistancecomprehensivelinks/
delivering content. However, even the documentation for these types of products can benefit from the inclusion of some psychological techniques.

Identifying the changes

One of the best ways to illustrate what a new model for technical writing might look like is to look at what some organizations are doing already. Indeed, it was noticing that some organizations were breaking the technical writing "rules" that prompted us to investigate the changing nature of content.

We have noticed some Technical Writers in leading companies are consciously or unconsciously now applying techniques from other disciplines (such as psychology, copywriting, usability and elearning) to the information they create.

A consistent brand identity for web-based software and services

Companies spend a lot of money creating glossy brochures and finding the appropriate emotional words to persuade prospective customers to buy their products or services. In the past, this changed once you became a customer. User guides were printed in black and white instead of colour, on cheap paper stock rather than glossy.

However, with web-based services this has changed. Many organizations work on a “try before you buy” model, and this, alongside the unified experience a web-based product provides, leads them to adopting a single, consistent brand identity at every point of the user experience.

In order to build these positive brand relationships, organizations need to manage the users’ emotional experiences during every encounter with their products or services. This means they’re designing products aimed to build experiences that engage and capture the user’s attention, creating an emotional relationship between the product and the person who uses it. We know from usability testing that people find pleasurable products attractive: they make them feel good, leaving them satisfied emotionally. Some claim this is leading organizations to have more nurturing and caring business values.

Organizations such as Tui Travel PLC, one of the world’s leading travel agencies, want to create a consistent customer journey through their websites. For them, this includes nurturing the customer at every stage, so that the travel experience is special.

One persona for Help but with adaptive tones of voice

Technical documentation written today really doesn’t take into account the different states of emotion users have. This can lead to users bypassing documentation completely, as they expect it won’t meet their needs.

Joel Spolsky, a software engineer and writer, said in a famous article on software design:

"Users Don’t Read the Manual. In fact, users don’t read anything."

We would argue that users do read – they read lots of content on Facebook, Twitter and elsewhere on the web.

According to technical writing consultant Mark Baker:

“The medium is not the sticking point, it is the instruction, the unpleasant exercise of expending mental energy required to learn something of slight or passing interest, and especially of learning it not from a person, or from experience but from some impersonal and abstract lump of content. They just don’t like it."

9 http://www.challengefuture.org/futurebook/august-2010/a-future-vision2030-leading-the-way-in-a-changi
11 http://www.joelonsoftware.com/uibook/chapters/fog0000000062.html
12 http://everypageispageone.com/2013/02/25/write-for-people-who-actually-read-documentation/
So perhaps we need to instruct and guide some people and in some situations without it looking like an impersonal set of instructions.

The context where content is used

Websites such as MailChimp.com indicate some of the changes that we are likely to see in User Assistance. MailChimp is an email newsletter service that enables businesses to send newsletters or email marketing campaigns to a mailing list. They recognize the user’s “state of mind” and deliver content that is best suited to that state. In their style guide for writers\(^\text{13}\), it states:

“Before you write content for MailChimp, it’s important to think about our readers. Though our voice doesn’t change, our tone adapts to our users’ feelings.”

This means, the tone of voice changes to match the context. Psychologists talk about moving from a dominant to a submissive communication style, but you may find it easier to see it as becoming “the guide on the side”. In many cases this means adopting a more informal and submissive tone. By this we mean, you should let them feel the user is in control, and they can choose to do a particular action or not.

Other sites, such as Twitter, switch between an dominant and submissive tone for their User Assistance. We have summarized the changes in the diagram below:

<table>
<thead>
<tr>
<th>Dominant</th>
<th>Submissive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcements and New Stuff</td>
<td>Announcements and New Stuff</td>
</tr>
<tr>
<td>Wellcome to Twitter Support!</td>
<td>Wellcome to Twitter Support!</td>
</tr>
<tr>
<td>New user FAQ</td>
<td>New user FAQ</td>
</tr>
<tr>
<td>Twitter Blog</td>
<td>Twitter Blog</td>
</tr>
<tr>
<td>Advanced tips and tricks</td>
<td>Advanced tips and tricks</td>
</tr>
</tbody>
</table>

On the Wufoo.com website\(^\text{14}\), the welcome page for the user documentation greets you with:

Don’t worry. We’re here to help.

Try searching our documentation on the left. If you can’t find what you are looking for, you can always ask Support.

You can see similar changes in tone on the different Help pages provided on websites as diverse as Facebook, Firefox and HTC. For example:

**How to set the home page\(^\text{15}\)**

Setting your home page in Firefox is easy. Can’t decide on just one page? No problem. Firefox lets you set a group of websites as your home page. This article will give you some examples and step-by-step instructions for customizing your home page settings to best fit how you work.

\(^{13}\) [http://voiceandtone.com/](http://voiceandtone.com/)


\(^{15}\) [https://support.mozilla.org/en-US/kb/How%20to%20set%20the%20home%20page](https://support.mozilla.org/en-US/kb/How%20to%20set%20the%20home%20page)
When Mercedes made nurturing owner’s handbooks

In the handbooks for Mercedes cars built in the 1980s, the user guide would congratulate the owner on their wise decision to purchase an expensive, high–quality car, and start in a very submissive tone of voice:

“You have bought a MERCEDES car, and you have a right to expect it to run trouble free and for a very long time whilst being as easy as possible to operate. Our service department have one request to make–for your own benefit. Please do not put this Owner’s Manual aside without reading it. It will offer you a great deal of important information, which will assist you in the operation of your MERCEDES car and make driving more enjoyable.”

Today, the emotional element has been taken out of the Mercedes handbooks, and they use a “minimalist”, formal style of writing. While that makes the text clearer and easier to translate into multiple languages, perhaps there’s a case for returning to a more nurturing tone of voice that empathizes with the owner.

No idea is ever totally original

In 2000, Professor Saul Carliner16 explained how to include an affective element in user guides:

“Design is an essential ingredient to the success of all these efforts. For example, to develop an online interaction, a technical communicator must not only write the message presented to users, but must first predict users’ goals, moods and motivations, and gear the message accordingly. If several different types of users encounter the same content, then the communicator must also discover this difference and display a message that’s tailored not only to the context and mood, but to the type of user.”

What are the benefits for doing this?

There is evidence from randomized control trials that these new approaches work, although we recommend you carry out your own testing to double check it works for your users. Measuring the effectiveness of User Assistance is notoriously difficult to do. However, you can measure any changes in the number of people reading a page that is online, and you can measure any changes to the number and nature of support calls.

Mozilla, the developers of Firefox, made the decision to write conversationally after carrying out A/B (or “split”) testing — it tried out two different versions of a webpage on a sample of people. With A/B testing, it could see which copy and design worked best, and then stick with that version (until it saw a drop in its effectiveness).

Firefox reported a change to a more submissive, friendly style resulted in a 13.1% increase in page hits17. The re-written pages were helpful to 800,000 more people per year, providing a significant reduction in support calls.

How can software help us make this change?

We need to provide the right content for the right context, and software, such as Adobe’s Technical Communications Suite, can help us to do this. When, where and how it appears is as important as the words themselves.

Making sure your writers use the appropriate tone of voice

A common approach is to ensure a consistent and correct tone of voice is used for the different types of user information. In addition to providing a style and tone of voice guides to writers, you can also create templates in your authoring tool that contain guidance to writer as they write. By using RoboHelp’s styles features, you can ensure this text does not appear in the published versions of the content.


17 http://sumo.graymattergravy.com/slides/betterfm/
Role-based content views

Where a beginner may be nervous and anxious about carrying out a task, a more experienced user may have a completely different mood, perhaps curious to know how they can improve their skills and master a function or task. One approach is to filter content based on the individual’s needs. Using RoboHelp or FrameMaker’s conditional text feature, you write the content once and deliver dynamically filtered, personalized content based on criteria such as the user’s role, location or level of experience.

Integrating with Content Management Systems

You may decide to control the publishing of the more complex variations of the content by using an enterprise Content Management System (CMS). In this case, it is important you have a robust authoring and publishing tool to integrate with the CMS. Better integration between the content authoring and management engines ensures better version control, more streamlined workflows and increased ease of component reusability. Adobe FrameMaker 11 offers out-of-the-box integration with popular CMSs such as EMC Documentum and Microsoft SharePoint, allowing users of these CMS solutions to manage FrameMaker binary and XML files.

Using screencasts

You can use Adobe Captivate screencasts for a number of purposes. Video simulations and the use of stories, in particular, are proven ways to make information more memorable and engaging for users. Screencasts are a powerful way to provide information on how master a product, and they can be embedded within the user forums, the body of knowledge and training content you provide.

As the audio track is separate from the video with Adobe Captivate, you have the ability to experiment with different tones of voice within your product demos, application simulations and training material.
Enabling users to share, comment and contribute content

You can encourage users to interact with your content and share it via Facebook and Twitter by using Adobe AIR Help's features, giving users the ability to comment and contribute relevant content independently.

Adobe AIR Help also gives you the ability to enable users to providing ratings, and public and private comments. You can configure and moderate these comments with the Adobe Technical Communications Suite, and store them on the corporate network or on the web using an Adobe AIR application.

Feeding user-generated content back into the body of knowledge

Adobe RoboHelp 10 enables you to integrate user-generated content from forums, wikis and blogs into your "authoritative" Help content, through dynamic widgets.
Summary
Technical Writers typically use technical communications standards that were written over thirty years ago. Today, with our ability to analyze large amounts of information on user behavior (through analytics, feedback and usability testing), we can gain a more detailed understanding of users. With this better understanding, we have the opportunity to identify the situations where the nature of the content we provide – the tone of voice and persona should change so that it better meets the users’ needs.

The good news is these changes do not require a radical overhaul of the authoring tools Technical Writers use today. Instead, there is functionality in tools such as the Adobe Technical Communications Suite already that will assist them in making this change.

Biography
Ellis is Director and Help Strategist at Cherryleaf Technical Authors, a technical writing services and training company based near London, in the United Kingdom. He has over fifteen years’ experience working in the field of documentation, has a BA in Business Studies, and is an Associate of the Institution of Engineering and Technology. Ellis is also an author and editor of two books: ‘How to Write Instructions’ and ‘Trends in Technical Communication’. Ranked the most the influential blogger on technical communication in Europe, Ellis is a specialist in the field of creating clear and simple information users will love.