The Guerilla WriteFare Four-Point Writing Project Success Guide

By Michael Knowles

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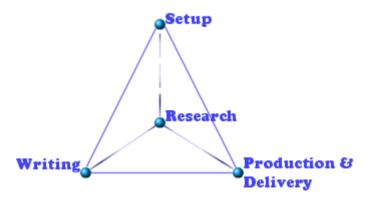
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Chapter 1
Setup is Everything

Have you ever worked on a truly awful writing project? Maybe you're working on one right now. Too often, what could be a simple project becomes a morass of shifting requirements, last-minute changes, and expanding scope. In almost one hundred percent of such cases, however, a well-run writing project can negotiate the most challenging terrain.

I visualize writing projects in four points:

Each of these four points is crucial to successful project completion. They are applicable for all writing projects, whether handled by teams or a single writer. If you manage them well, you will be able to handle any project with ease.

Setup Is Everything

That bears repeating: Project setup is everything. Do the setup well, and the remaining four points will almost take care of themselves.

1. State Your Goal

Steven Covey admonishes us to "begin with the end in mind," and nowhere is that more important than in the project setup point. Begin by writing down the project goal in a single, simple sentence:

> The goal of project X is to deliver product support materials for product Y by date Z.
>
> The goal of project A is to deliver a sales letter to customers on list B by date C.

The goal acts as your guiding light throughout the project. Focus on it, and remind yourself of it each day as you work the project.

2. What are the Deliverables?

For projects similar to those you've handled before, defining the deliverables is simple. For updates to existing materials, the deliverables define themselves.

But what about new products or customers? To identify the deliverables, interview the key project people. An overview of the project, its objectives, and its end uses and users is critical to identifying deliverables. Get an idea of the project scope -- the what, when, how many, and who that describe the project's complexity.

> **GW Hot Tip**
> Avoid the temptation to get too deeply into project details here. You'll get bogged down. You only need to survey the area before stepping into the wilderness.

Establish the end-user requirements. Must you deliver hardcopy or digital documents? Are the documents delivered with the product? Mailed to a customer list? Available on CD-ROM, on the Internet, or installed on a server in the customer's intranet?

It's likely that you will have considerable say regarding the how and what of delivery. Do your research and apply your experience. Help the project team by recommending deliverables yourself. In many cases, the team will be looking to you for the most appropriate means of delivery.

3. Create a Plan

"Plans are useless, but planning is essential," said Dwight Eisenhower. Your plan can be as simple as a single sheet of paper identifying deliverables and dates, or as detailed as a 30-page document identifying each item to be delivered, the critical assumptions that can make or break timely delivery, schedule, and a full cost breakdown.

In terms of working with the project team, the most important part of your plan is the schedule. The simplest and most useful way of presenting your schedule is in a Gantt chart. Gantt charts are easy to construct; you can build them in a spreadsheet, or you can use any of the excellent project tools available on the market.

> **GW Hot Tip**
> A Gantt chart is a graphical outline of steps in a process with dates assigned to each. For a great project tool, look at TurboProject!

To create your schedule:

1. Start at the delivery date.
2. For hard copy, allow 5 to 10 business days for production, printing, and shipping. *This is noncompressible time because it's a manufacturing process.* You

      can pay a premium for short-run overnight quantities, but never plan on doing business that way. Keep it up your sleeve for emergencies.

      For soft copy, allow 1 to 2 days for production and testing.

3. You now know where your *real* deadline is: it's the day on which you must stop writing and prepare for production.

4. Allow at least 5 business days for each review cycle, and 2 or 3 business days to incorporate reviewer comments.

5. Give yourself 10 business days to write the review draft for each your documents. (Believe it or not, you *can* write almost any technical manual, of any length, in 10 business days or less. One day I'll show you how.)

6. Research is your single biggest variable in the schedule. Only experience can tell you what to allow for it. I usually give myself 5 to 7 days to research complex subjects.

As you construct your schedule, you'll see obvious places where you can interleave projects. For example, while one document is out for review, you can be writing the next one.

4. Do a Reality Check

Share your schedule with project peers before finalizing it. Doing so gives you greater confidence in the results. Then get ready, because the fun is about to begin!

Chapter 2
Research

Project setup establishes the scope and goal of your project. In the project research phase, you fine-tune what you did in the setup phase.

Research

Research is more than simple fine-tuning. It is the exploration and identification of your audience profile, your subject matter, and your working outline.

1. Audience Profile

The audience profile guides all of your research. I believe that writers must know the subject matter at least one level deeper than the level at which they're going to write. By knowing the subject better than your readers, you will have the depth of understanding required to say what needs to be said in the fewest words possible. If all you can do is regurgitate something that you do not understand, your document will simply take up disk or shelf space.

And you'll have wasted your client's money.

Begin with the initial audience assessment that's part of the straw plan created in the setup phase, then dig deeper. Ask:

- Who is the reader?
- What sort of work do they do? Describe a typical day in the life of your reader.
- How much can you expect the reader to know? Is the reader a technology expert, neophyte, or somewhere in between?
- Is the reader already familiar with your product?
- How is the reader expected to use the material you write? As a last resort? As a training guide? As reference material?

In the end, a well-written book or paper is transparent to the audience. In an ideal world, when readers have finished using your document, they should be focused on what it is they're trying to achieve, rather than on the pain of having to read yet another worthless document.

2. Subject Matter Research

Digging into the subject matter requires the use of many resources. If I'm working with a subject about which I know little, I begin my subject matter research by reading what's already been written about the subject -- especially literature written by my client's competitors. Such literature helps me to see what others in the field are doing, and also allows me to set the bar for my own work. I want my client's product to be far better than the competitor's.

> **GW Hot Tip**
> When you're working on tight deadlines with engineers who have limited availability, use guided chalk talks to get the information you need quickly.

Once you understand the subject in general, start digging into the specifics of your project. It is useful to work from the outside in; having the big picture gives context to the deeper, subtler layers of the subject matter. Start with high-level project personnel. Interview the product manager, project manager, customer services lead, marketing manager, and engineering leads. And if you ever use the words, "They didn't reply to my e-mail," you should be drawn and quartered with your own pen!

Subject matter research is personal. The relationship you establish and maintain with subject matter experts is a key element of completing your research successfully. Use the techniques described in books like *How to Win Friends and Influence People* by Dale Carnegie to help you if you feel unsure of yourself.

No, I am not kidding.

E-mail is useful when you're working with remotely located experts, but establishing a face-to-face or voice-to-voice relationship yields results because you become a real person. Never use e-mail as an excuse for not getting the information you need to get the job done. The most successful writers foster strong relationships with others, because they get better results that way and because they like the interaction.

Research is iterative. As you dig deeper into the subject matter, make notes as questions come up and follow up on those notes. At some point you'll feel, well, full. It's then that you might want to start a working outline.

3. The Working Outline

Outlines can be as detailed or sketchy as you like. My experience is that a good outline speeds the process of producing your first draft.

Use the outlining method that works best for you. Some people like the sentence-style outline, and others prefer to be less formal.

If I'm writing a book, I create a major heading for every chapter and have about as many subheads as there are pages in that chapter. (This is a handy way to calculate your page count, too, by the way.) For papers, I create a major heading for every major section, and there are about as many subheads as there are subsections.

> **GW Hot Tip**
>
> Outlining tools are great for creating hierachical lists and allowing you to brainstorm. Some word processors support outlining, but I find them to be a little clunky. I use MyInfo from Milenix. It allows me to bounce back and forth between outline and text, then export the results to a rich-text formatted file.

Sound like a lot of work? It can be, until you get used to the practice. But in my experience, a strong outline triples or even quadruples writing speed. In fact, by doing research properly and building a great outline, you'll find that you can write almost any technical document in less than 10 business days.

Without overtime.

Chapter 3
Writing

In the project setup phase, you established the scope and goal of your project. In the research phase, you fine-tuned what you did in the setup phase. In the writing phase, you will put the two together, lean into that keyboard, and type type type.

Writing

How do you feel about the writing phase of your projects? Do you look forward to it, enjoy diving in and producing the fruits of your labors? Or do you dread it and put it off until the last possible moment? If you are a writer, then the writing part of your project should be a snap. But I know quite a few writers who look upon it as a chore.

What if I were to tell you that you don't have to dread the writing? And what if I were to tell you that you *could* write any piece in less than ten business days?

No, I'm not kidding.

1. Opening Up to Your Writing

When writers tell me that they dread the chore of writing, I ask them about that fear. And it is fear: fear of failing, fear of success, fear of being seen as incompetent. I've always believed that fear is a choice, a state of mind, something over which I have ultimate control. As a sufferer from anxiety and panic attacks for many years, my own experience is that you can walk through that fear and come out on the other side a better writer.

Walking through the dread involves opening up to your writing. By opening up, I mean stretching your mind the way you stretch your body after a good night's sleep. You raise your arms over your head, lengthen your legs, and it feels really good. Opening up to your writing feels exactly the same.

I have learned to practice writing not with discipline, but devotion. For me, the discipline to write comes out of my devotion to it.

The single most important part of writing is your state of mind. You must get rid of the tight spots. How you go about that is entirely up to you. Some writers walk. Some work out. Some sketch or draw, and others work in their gardens. I like to walk and practice yoga. Find the thing that loosens your mind, and you'll find the key to fluid writing.

In the end, I believe that writing is a gift, and that there is joy to be had in the act of writing -- yes, even in business and technical writing. Stop struggling. Keep your eye on the goal and let go of the results.

2. How to Write Any Book in Ten Business Days or Less

Yes, any book. Sound far-fetched? It isn't. If you've done the setup well, thoroughly researched your subject, and have opened yourself up to your writing, then you can write faster than you ever thought possible.

I spend a considerable amount of time in the setup and research phases. I swim in my subject matter. Then, when I sit down to write, I simply go with the outline and dump out everything I've learned. Here's a process that works, every time:

1. Before you begin, decide that you will do no editing while typing. That means no spelling corrections, backspacing, or long pauses. You do not want to think in the rational sense. You want to let the mind attach directly to the fingertips and dance on the keyboard. This is a devotional approach to it, and it's freeing because you no longer have to worry about mistakes. You'll fix them later.

   Yes, it takes practice. I don't do it perfectly, but most of the time I manage to make it through without too much backspacing.

2. Remind yourself of the words of Hemingway: "The first draft of anything is shit." That, too, is immensely freeing.

3. Print your outline if you haven't done so already, and set it in a comfortable location beside your computer screen.

4. Open up the first template or text file, type the first outline heading, and start writing. Don't stop for 45 minutes.

5. When the 45 minutes is up, stop wherever you are and stand. Take a breath. Walk around. Let your shoulders and back release. Leave the office or cubicle for a bit. Then come back in 15 minutes, and do it all over again.

6. When you have amassed five or ten pages, stop. Let your mind rest. Go to a project meeting and snooze. (Just kidding.)

7. Editing. I usually wait until the next day to edit the previous day's work. Since I'm a morning person, I write in the morning and edit in the afternoon. Do what works for you.

How can this work? Let's say you type 50 wpm (medium speed). If you work for 45 minutes an hour, for four hours a day, that's about 9,000 words, or

nearly 25 pages of text. In ten days you'll put out 250 pages...90,000 words. Most technical documents are not so loaded with text on every page. In the case of procedures, for instance, there's quite a lot of white space between steps.

I hear what some of you are thinking. "That's ridiculous." "It'll never work in the real world." "I could never do that."

Horse hockey.

I work this way, and I know many other writers who do, too.

"But what about all the meetings I have?" You seldom have all-day meetings. Besides, you're only planning on four hours a day. The other four are for editing, meetings, administration, ping-pong, walking, and so forth.

Obviously, if you are also the illustrator, then you must allow time for that. Illustration is a task that fits into the other four hours.

3. Set Your Boundaries

I'd be remiss if I did not at least mention the concept of boundaries. Personal boundaries are what make it possible for you to not answer the phone, to avoid e-mail or Web browsing for awhile, and to tell your boss or coworker, "I'm in the middle of something right now. Can I get back to you in a few minutes?" You can object all you like, but if you're allowing yourself to be controlled by interruptions, whose fault is that? It isn't necessary to be mean, hostile, or surly. But it is necessary to stand your ground because, after all, if you are a writer, then you must get around to doing the service that you're selling.

Your writing skills.

Now...write!

Chapter 4
Production & Delivery

In the project setup phase, you established the scope and goal of your project. In the research phase, you fine-tuned what you did in the setup phase. In the writing phase, you put the two together and wrote your document in less than ten business days. In the final installment, we stride into manufacturing with Production and Delivery.

Production & Delivery

The final phase of the four-point writing project success strategy is almost noncompressible. Production and delivery are physical processes that require specific amounts of time. While it's possible, for example, to get quick turnaround on certain types of printing (for which you pay a hefty rush fee), you will have to plan for the time required to produce and deliver your documents.

Let's look at the things you can do to expedite the process as much as possible while keeping costs down.

1. Use a Production Checklist

I am notoriously forgetful when it comes to what I think of as mundane tasks. I always have to remind myself that, as onerous as it may seem, the task of production is as important as any other part of a writing project. It is in production that we put the eyebrows on our final product. I use a production checklist to ensure that I forget nothing and insure consistent quality among the documents I produce.

The following checklist highlights the areas that need checking. While it is geared more toward the small or single-person writing group, the checkpoints are the same in any publishing environment.

- **Proofread.** I read my document from back to front (literally) to catch repeated words and sentences that don't make sense. When possible, I use a production editor to do the final proof. I separate proofreading from spell checking, because spelling checkers are fickle and I tend to distrust them. That being said...
- **Spelling check.** I run my word processor's spelling checker. No one is a perfect proofreader, and it never hurts to have a bit of insurance.

- **Check headers**. I verify that my page headings are laid out correctly. In my case, that means check that the dictionary heads occupy the outermost page position on odd and even pages.
- **Check footers.** Are page numbers formatted correctly? Is the document title, if used, presented properly?
- **Complete front matter.** Ensure that copyright notices, trademarks, and other items are written correctly and are complete. Double-check the copy for the title page and cover.
- **Complete back matter.**
- **Check pagination.** When you are the writer and publisher, you must verify pagination yourself. Look for widow and orphan lines, and get rid of ugly spaces where possible.
- **Check illustrations and tables.** Verify that they are appropriately placed and labeled.
- **Proof table of contents and index.** Make random checks of referenced page numbers, because even the automatic index and TOC generators occasionally make mistakes.
- **Check online document links.** If your document is designed for online use, use an appropriate link-checking tool to verify all hyperlinks. Check the table of contents or topics list to verify that the proper file comes up. This is particularly critical for tools that use applets or JavaScript to build tables of content.

2. How to Handle Electronic Production

Documents that are designed for online consumption generally come in two flavors: HTML-based or PDF-based. (PDF stands for Portable Document Format, the document format used by Adobe Acrobat®.) Granted, there are many exceptions to that rather broad statement -- documents designed using Macromedia products come to mind -- but in all cases there are certain production elements that I like to verify.

- Double-check final files.
- If posting your documents to the Internet or to an intranet, verify accessibility from appropriate locations. Run a link verifier once the document is on the production server to double-check links.
- If your electronic document is published through a source-control tool such as CVS, or published through an automatic content delivery mechanism, know what the turnaround times for posting are so that you can ensure document availability with the product.

3. Understanding the Land of Printing

I have scarcely enough room in this brief article to even scratch the surface of printing and all it entails. More writers than ever before are faced with the task of being a one-person shop. If that's the case for you, then you must become a student of the printing process. You don't need to be an expert, but if you don't understand the overall processes involved in printing your documents, you will be at the mercy of every print vendor on the planet. And you will be incapable of producing a publishing schedule that works.

By the way, it's a good idea to establish a working relationship with a reliable print vendor. Copy centers are okay for emergencies or short runs, but I almost never use them. A good print vendor will help you prepare your documents correctly, and over time may discount services to you as a returning customer.

Digital Printing

Most -- if not all -- documents produced by small or one-person writing groups are printed digitally. They are often delivered to the printer as PDF files, though some writers use page layout tools such as QuarkXpress, PageMaker, or Adobe InDesign to get their work ready for print. Print vendors are accustomed to handling files in a variety of formats, and often have pre-print services available (for a fee).

If you do use PDF files for your print master, read the material at the free Adobe Studio expert center on <u>fine-tuning files for printing</u>.

Allow five to ten business days for digital printing: one day for delivery to the printer (they'll likely not start printing on the same day), three to five days for actual printing and bindery (depending on quantity), and one more day to deliver the printed copies back to you.

A final word on digital printing: If you are on a tight deadline, you can get very short runs of your documents to meet first customer shipments.

Offset Printing

If you are printing books of more than about 250 pages in runs longer than about 1500 copies, then you are going to want to use offset printing to produce your documents. And when you go offset, you must allow more time for production. Your print master -- which these days is usually electronic -- must be set up correctly for offset printing or you will pay to have your files redone. Unless you are also a graphic designer who is intimately familiar with preparing documents for press, you would do well to find such a person to help you through this process. I'd say it's a must, in fact.

Although the latest computer-to-plate technologies are reducing turnaround times, it still takes longer to get your printed documents than it does in the digital printing world. In the offset world, setup is your friend. Errors in printing setup cost you hundreds, even thousands, of dollars. People who are not in the publishing business do not understand these issues. You will have to educate the uninitiated so that they'll understand it when you tell them that they cannot have even one copy overnight.

I cannot possibly cover all the territory here. I recommend the following books to help you learn the manufacturing process known as printing:

- [Official Adobe® Print Publishing Guide](#) -- Not so Adobe-centric as you might think. It's a good guide to pre-press and printing issues.
- [Getting It Printed](#), by Mark Beach and Eric Kenly -- Simply one of the best books on printing available today.

3. Distribution and Delivery

This is probably the easiest part of the entire production and delivery process. You essentially have two choices: deliver documents online, or deliver them in hard copy.

Online Documents

It's easy and inexpensive to deliver online documents. You can deliver them:

- Via ftp;
- Via CD-ROM or DVD-ROM;
- As part of the software (JavaDoc, JavaHelp, or WinHelp);
- Through links on the Internet; or
- Through links on an intranet.

Of these five choices, only delivery on CD-ROM or DVD-ROM involves a manufacturing process.

Hard Copy Documents

Delivering hard copy is a little more complicated because it inevitably involves shipping. Your choices:

- Ship documents with the product.
- Ship directly to customers using your company's mail room.
- Ship to customers through a fulfillment house.

A full-service printer can help you with distribution, so keep that in mind when selecting a print vendor.

4. Resources

It would take a tome to describe all the aspects of production and delivery that you need to know in the publishing business. Fortunately for you and me, others have already written them:

- [UnTechnical Writing](#), by Michael Bremer -- Contains an excellent section on preparing documents for hard copy production.
- [The Non-Designer's Design Book](#), by Robin Williams -- An excellent primer for those of us who are the one-stop-shop.
- [Pocket Guide to Digital Printing](#), by Frank Cost -- An industry bible.
- [Official Adobe® Print Publishing Guide](#) -- Not so Adobe-centric as you might think. It's a good guide to pre-press and printing issues.
- [Getting It Printed](#), by Mark Beach and Eric Kenly -- Simply one of the best books on printing available today.

Conclusion

I hope you've found The Four-Point Writing Project Success Guide helpful. You've learned about the importance of planning and the value of complete research. I've described how you can put any book together quickly and effectively if you've done your setup and research properly. And now you know a bit about production and delivery of your precious prose.

Now...go forth and be fruitful!