Social Media and the Changing Role of the Technical Communications Professional

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Introduction

Traditional documentation is a one-way conversation between a product's creators and its users. Users have traditionally experienced documentation in static forms such as printed user manuals, standard HTML web pages, and embedded Help content. The technical writer's job is to anticipate the most likely use cases and topics and produce documents that serve the widest possible spectrum of potential users. Customarily, technical communicators serve as gatekeepers of product information.

As the Internet, and especially, social media, have fundamentally changed the ways in which people engage with information, the nature technical documentation and the tech writer's role is likewise evolving. Customers are no longer satisfied with one-way, static channels of communication. They demand access to product information that is relevant, up-to-date, and tailored to their needs. Most importantly, they want to be part of the conversation.

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That conversation is already happening as users turn to social media over traditional documentation to find the help they need. Forums, blogs, video hosting sites and wikis provide two-way, peer-to-peer knowledge sharing where the roles of provider and recipient of information are fluid. Freely sharing knowledge in the online space corresponds to how people have always sought out information. As Sarah O'Keefe states in her white paper on Web 2.0 in technical communication, "The privileged position of official technical documentation is eroding, as it is competing with the collective intelligence of the web." (O'Keefe)

According to Howard Schwartz, Ph.D. of SDL Content Technologies, "The expectations of customers... have changed so dramatically (that) the notion of traditional technical publication has become obsolete." Prospects for tech communicators need not be so dire, however. Traditional tech comm and socially sourced content can complement one another, and social media can be a tool in the documentation team's arsenal.

This white paper will examine how social media and user-created content is changing technical documentation and with it the role of the technical writer. It will compare the relative advantages and drawbacks of each to customers seeking product help. It will also explore ways in which companies and docs teams are incorporating user content and hosting their own social communities, highlighting specific tools like MadCap Software's Flare and Pulse.

"The Web in general has democratized the world of publishing, and social media only more so" states David Carr, writing in Information Week. "Professional communicators must work harder because they're now in competition for attention with the voice of the crowd, blurring the distinction between author and audience." (Carr)

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Traditional documentation is static, created once and updated infrequently. User manuals are designed to address a product's most common use cases, covering hundreds of topics. But customers perpetually find new and innovative ways to use their products beyond those which the designers originally anticipated. When faced with a difficult problem or stuck trying to perform a task, users will only spend so much time searching the official company documentation before turning to third party sources or to their peer user community for the answer. Too often, traditional help documents are too large and too general to provide the kind if instantaneous assistance users have come to expect.

The Web is a virtually limitless source of information that is extremely dynamic, up-to-date, and responsive to queries. It can deliver highly specific, personalized information that reflects real users' authentic experiences. These experiences may address rare use cases never imagined by the product engineers or documentation team. Socially generated content, be it questions and answers in a user forum, a blog posts or wiki entry, clearly holds the edge in providing exact information as quickly as possible.

Web content is also chaotic, spread across thousands of pages, blogs, forums and communities with little organizational structure. (O'Keefe) A single Google search may return dozens of hits a user is required to sift through to find relevant information. Much of that content will be contradictory or outright inaccurate since literally anybody can create it. And if that content has not been properly linked or tagged, it may not show up in searches at all. No matter how useful it might be, content that can't be found effectively does not exist.

Thus it falls to professional writers to evaluate, edit, and ensure the accuracy, usability, and organization of external content. They will also provide and moderate the online spaces where this content is shared. The task, according to blogger Will Kelly, "will require a technical writer to take a stronger focus on technical accuracy ... who can keep online discussions on target and technically accurate." (Kelly)

How Social Media Enhances Help Content

Social media engages one of the oldest and most trusted methods of information seeking: person-to-person knowledge sharing. Asking a friend, colleague, or actual subject matter expert directly is the first, and generally most effective, course of action for most knowledge seekers. Social media expands this peer-to-peer brain trust worldwide.

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According to Jennifer White, product evangelist with MadCap Software, more than 56 percent of all Americans had at least one profile on a social networking site as of 2013. (Smith, MadCap presentation). The technology driving social network is constantly evolving to meet user demand for up-to-the-minute information, while shrinking docs departments further tax the time and resources of tech comm professionals. Adding a social media layer to documentation can help to free up these impacted resources, increasing revenues as well as customer satisfaction.

Public content will not replace professionally produced documentation, but can enhance technical communication in a number of ways. Social media can stimulate discussion and inspire questions that might not have been considered by the product's creators or the documentation team. It can help to reveal gaps in knowledge, especially in regards to less common or unanticipated use cases, and allow users to fill in those gaps. It can also help companies identify how customers use their documentation and provide invaluable feedback to help writers and engineers to improve their products.

There is also a personal element to the user experience. Tech writer and blogger Sarah Maddox suggests using social media to engage readers in the documentation. "It's also about fun and games and a bit of emotion in the docs." (Maddox)

White cautions that conversations about companies and their products are already happening online on blogs, in user groups, and on YouTube. It is incumbent upon technical communicators to participate in, and ideally moderate that conversation. She strongly recommends that companies integrate social media into their documentation strategy. Her company, MadCap software, offers a suite of apps for this purpose; FLARE, a single-source, XML authoring tool, and PULSE, a plug-in that adds a social layer to Flare content.

The following section will look at a case study of one tech company, Venafi, and how they integrated these social tools and traditional documentation in the recent overhaul of their help system.

Case Study: Venafi

Venafi is a market-leading cyber security firm based in Salt Lake City, Utah whose clients include government, financial and health care institutions and global 2000 enterprises. The company had more that 1,700 pages' worth of printed documentation. The majority of this was created out-of-house, and much of it was redundant, inconsistent and poorly organized.

Looking to overhaul the company's help system and bring documentation in house, Venafi's documentation team set the following goals:

1. Streamline product guides, eliminating repetitive information
2. Use single sourcing to deliver both online help, print and PDF documents from the same content.
3. Create an interactive, socially enabled online help experience

Venafi chose MadCap FLARE to convert their documentation into a single-source, XML based platform. Importing all of the company's existing documentation into a single Flare project, they were able to efficiently streamline and output their content as a series of searchable, topic-organized HTML5 web pages. This secure new format dramatically improved the usability of the documentation, according to Principal Information Developer Derek Warren, for "users are no longer hit with a wall of content."

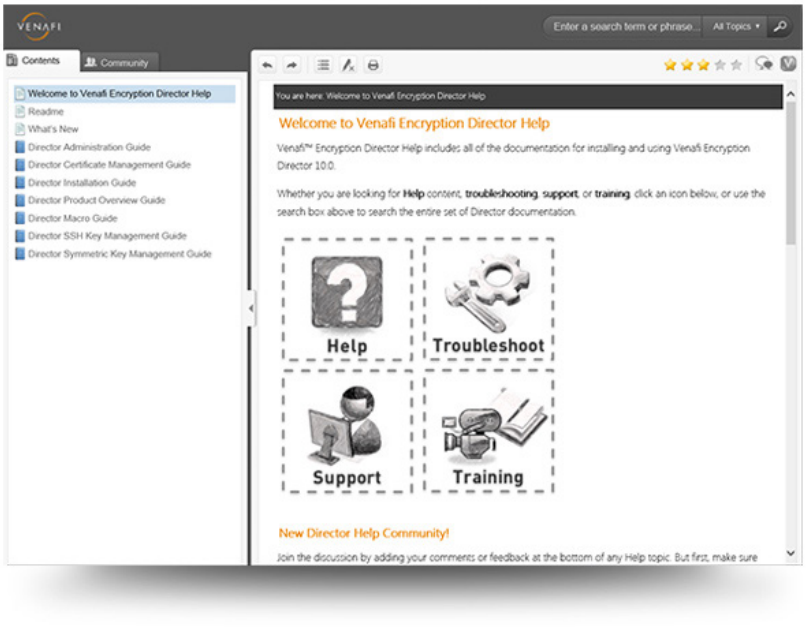

Figure 1: Revised Venafi help page, built in MacCap FLARE.

With its revised help system in place, Venafi looked to add an interactive, social element to the documentation. We will explore in detail the how the company ultimately addressed this issue, but first lets step back and take a broad overview of the social media landscape and the ways in which user generated is being implemented in technical communication.

Tech Comm and User Generated Content.

Traditional technical documentation is comprehensive and conceptual. Professionally produced documentation is general and broad in focus, and is expected to be accurate. It is the only type appropriate for critical industries such as medical or biotech, where inaccurate or confusing information could have severe, life threatening consequences.

User generated content tends to be less comprehensive than traditional documentation, but has the potential of being highly specific and specialized. It has the capacity to address more rare use cases, and often reflects the author's personal and passionate interest in the subject. User contributers may also be candid and unfiltered in areas where professional tech writers would be constrained by the need for tact or confidence, or restricted by workplace protocols.

Author credibility is an unavoidable issue with user generated documentation. Literally anyone can create and publish this content, thus its quality and accuracy vary from author to author. It is logical to presume greater credibility of traditional tech comm sources, but for a variety of reasons this is not always the case. In many instances current or former employees or insiders may publish credible information anonymously for reasons of propriety. A pseudonymous blog can provide an opportunity to share their personal expertise or insight without the need for professional discretion. Regular readers often become aware of the author's identity and reasons for anonymity, granting even greater credibility to these sources.

Most modes of social media include tools such as ratings, post counts, and badges, that help readers determine how much trust to put in these external content sources. Accurate and useful information ultimately develops out of reader consensus. To better understand how social media functions in the tech comm world we first need to look at its relevant forms.

Social Media Models for Tech Comm

Wikis

Wikis are a standard open source model, appearing in just about every type of organization and field of interest. Freely contributive and editable, they are designed to capture the collective intelligence of their participants (Schwartz). The key strength of wikis is their organization; Structured on logical groupings, they facilitate navigation and make relevant information easy to find.

One trade off with wikis is the lack of control over the accuracy of information. By their very open nature, wikis are susceptible to vandalism, unverified or biased content, even spam. Although the consensus of the community tends to keep the content mostly valid and accurate, users should use caution when referencing wikis as a definitive source of information.

Blogs

The independent and uncensored nature of blog content can be an invaluable resource for tech writers and others looking to identify areas for improvement. Bloggers address and criticize products and documentation issues uninhibited by commercial realities. They also present a challenge for organizations, being the perpetual need to control harmful, false, or biased information in the blogosphere.

For this reason, it is incumbent for technical documentation teams to stay active in the blog community. Most technology companies host their own internal blog and many technical writers are themselves bloggers. At minimum, tech comm professionals must read and comment on articles pertaining to their own field or products.

Forums

Online message boards predate the modern web. Although most company websites now include some sort a discussion area, forums are very easy to set up and thus ubiquitous online. The vast majority of these forums exist well outside of corporate control.

Forums are generally organized and searchable by broad topics, but lack the navigational power of wikis. Therefore finding relevant information can require reading through very long threads. As with blogs, tech comm professionals should participate actively in these forums and as much as possible to correct inaccuracies and manage online discussion around their products.

Other formats

YouTube, Twitter

Tech authors and content creators have devised creative ways to utilize social media channels such as YouTube, Twitter, Facebook and Instagram. They are producing and publishing rich multimedia content such as video tutorials, product reviews and podcasts. These innovative approaches can also apply to traditional documentation. Tech companies are now publishing release notes and updates via Twitter and other platforms. Others solicit users to post tips and tricks with the product hash-tag (#), then publish the resulting live-stream within their own help page. (Maddox)

Social media provides many powerful tools for publishing and accessing help content, but the issue for tech comm professionals and organizations is that these channels exist largely beyond their control or influence. The challenge for documentation teams is to connect with independent user-creators and incorporate their most useful of contributions into the 'official' documentation. The solution is a strategy known as Live Product Content.

Live Product Content, also known as living documentation, has three main components:

1. XML Single-Source (XML) content

Modular, 'live' content can deliver targeted, rich multimedia content quickly in response to a user query. Single-sourcing allows content to be refreshed instantly, ensuring it is up-to-date and consistent across the product line. It can utilize Customer Relationship Management (CRM) to tailor the information even closer to the user's experience, level of expertise or relationship to the organization.

2. Two-Way Interaction

A social media layer, incorporated into the main documentation, allows users and others outside of the docs team to contribute and comment on the content. It creates a feedback loop among customers, writers, managers and others both outside of and within the organization, such as field service reps or subject matter experts who can offer different perspectives on how the users interact with products and help systems. Tech authors can then use this expanded feedback to improve their own documentation. The social layer's rating and approval system can also help the docs curate the most useful external content into the official documentation.

3. Customer Analytics and Reporting

Live Product Content platforms include tools for analyzing and reporting on how users work with content. Reports might show, for example, which content most frequently read and how useful it is to the customer. By revealing how documentation is being used, these analytics help authors improve the documentation and eliminate content that confusing, redundant, or not preferred by most users.

Having re-authored its original documentation in FLARE, Venafi the first element of Live Product Content in place. The company considered a number of solutions for the interactive and analytic components, originally favoring setting up a Wiki. In the end they chose PULSE, MadCap's dedicated plug-in for FLARE content. Touted by its creators as "the first documentation-centered social media platform" (White, interview), PULSE adds a topic-specific social network layer onto each page of the help system.

Pulse's embedded social layer lets authorized users to interact with the documentation in a number of ways. Closely resembling Facebook and similar social networks and embedded by topic, as shown in Figure 2 below, the intuitive UI provides users a connected online space to converse directly with the documentation team and their peers. Here, users may discuss and rate the original content and post their own rich content, including files, images and video. They can also comment, 'Like' and up-vote fellow users' submissions, ask and answer questions and share knowledge, tips and tricks, ask or answer questions, and share knowledge.

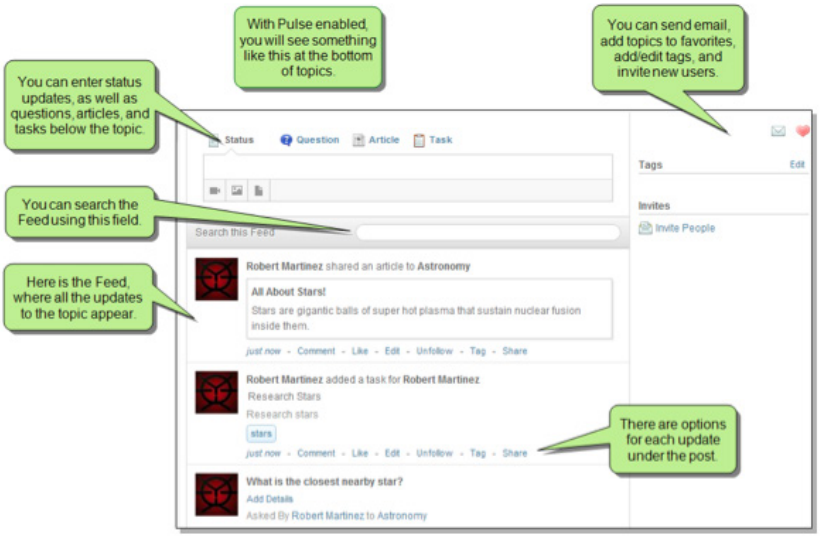

Figure 2: Pulse enabled social layer adds Facebook-like interactivity by topic, allowing users to comment on, like, and and contribute to the documentation.

Because this interaction is embedded into the topic and connected to the documentation, it remains under the control of the organization. A site administrator, generally a member of the docs team, is responsible for accurately tagging all of this external content, ensuring everything is organized and searchable.

PULSE comment and approval tools enable site administrators to curate the most useful and approved user content into the organization's own documentation. An example of this document chain, from authoring to curation of external content, is illustrated below.

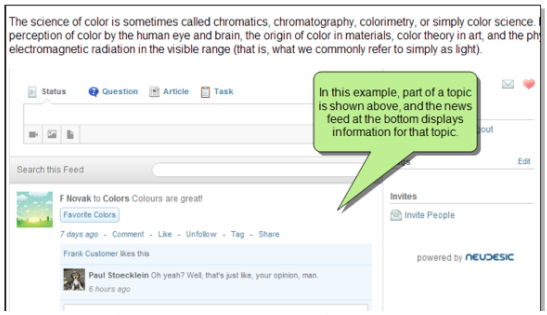

Figure 3: Readers comment on original topic.

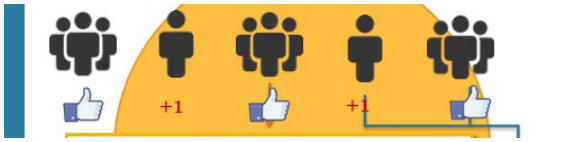

Figure 4: Users 'Like' and upvote contributed content and commentary.

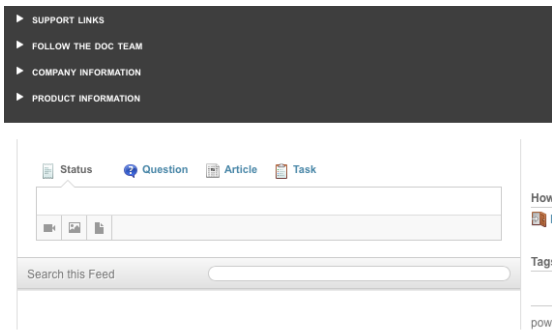

Figure 5: Social interface provides multiple for readers to interact with the documentation and creators.

1. Documentation team creates the content.
2. The author tags the original content with searchable terms.
3. Users, including other team members within the company, read and comment on the original content. (Figure 3)
4. Readers contribute supplemental content (files, articles, video, graphics), suggest alternate use cases and improvements to original documentation.
5. Registered users 'like' or comment on these posts. (Fig. 4)
6. Frequently 'liked' content is highlighted in subsequent searches.
7. Fields allow participants to suggest topics, ask questions, share tips and add more relevant content. (Figure 5)
8. Docs team integrates the most useful or community endorsed content into the official documentation.

Finally, Pulse includes robust reporting tools, satisfying the third element of LPC. Tech authors can generate a variety of reports revealing how and by whom the documentation is being used. These reports can track user activity and behavior, revealing for example the most widely read topics and frequently searched terms, or a profile of user groups. Such data can help the docs team better understand the user community and refine the content to improve the user experience.

PULSE allows tech comm professionals to foster collaboration between authors, employees and external users while maintaining full ownership over the resulting content. It is this functionality that ultimately convinced Derek Warren and Venafi to adapt the Flare and Pulse solution. Warren reasons that, "Even if we capture 1 to 2 percent of our customer base, we'll have volumes of information beyond what we know today about what our customers need to be successful" (MadCap – Venafi Case Study)

A Note About Credibility

Credibility of authors and accuracy of information are concerns inherent in the social media realm. Whereas in-house writer are presumably the most credible sources for technical documentation, social media contributers establish credibility among their peers in a number of ways.

Identity versus Anonymity

As previously addressed, anonymous authors are often viewed as credible source, particularly when the source is known to be an insider or someone privy to inside information. Generally, however, authors who publish or post under their own name tend to be regarded as more credible and trustworthy than anonymous sources.

Post Count

One common indicator of a blogger or forum member's credibility is frequency of their participation. A high number of articles implies a strong level of knowledge in or passion for the subject. For this reason, most blogs and online communities include this number alongside the user profile.

Membership Date:

Closely related to post counts, forum members include their date of registration to show their length of participation.

Ratings and Badges:

Badges function as a shorthand ranking system, indicating the author's credibility. Community ratings such as the number of 'likes' or 'up-votes' generated by the contributor's content are featured prominently in the user's profile.

Classification and Membership Level:

Community admins may rank or classify members in accordance with their community rating, level of participation or length of membership. They can also assign privileges associated with each level and determine the criteria for promotion. A 'Junior Member' attain 'Senior Member' status after100 posts, for example, but admins may also promote members at their own discretion.

Admins can define the structure of the social layer within Pulse, customizing membership levels and rankings and setting reading and posting privileges for each. The default Pulse breaks down as follows:

Admins can create groups, set membership levels and promote users. Can also generate and access reports

Basic Users, the majority of registered users and customers who purchase the product, may post articles, videos and files, ask questions, subscribe to topics and receive email notifications.

Advanced Users, employees and frequent participants, may assign tasks, join groups and access special apps in addition to all basic user privileges.

The General Public (Lurkers) can view and search comments and rate topics without registering, but must create a user profile prior to commenting or submitting content.

Conclusion: Will Social Media supplant traditional Tech Comm?

Dire proclamations about the impeding demise of traditional technical documentation at the hands of socially generated content are, to paraphrase Mark Twain, greatly exaggerated.

"Traditional technical documentation isn't going to disappear anytime soon,"

"Traditional technical documentation isn't going to disappear anytime soon," assures Will Kelly. Many customers and users still strongly prefer traditional forms such as printed user guides, manuals, and internal websites to unstructured, outside content. The quality of socially created content and content creators vary wildly. Most do not have the access to engineers and SMEs, or have done sufficient research to create useful documentation. And even the most helpful and informative content is worthless if it can not be found easily and quickly by users.

Make no mistake, however; Modern technical communicators are competing with the collective intelligence of the Internet. Users will turn to the most efficient and relevant source of information to solve their problems. Technical writers must be responsive to the ways in which people in the connected world seek out and use information. Customers become experts in the products they use. They are passionate and motivated to share their knowledge and demonstrate their expertise. By engaging customers and users as content providers, companies not only benefit from their expertise but also cultivate consumer relationships and brand loyalty.

Tech comm professionals must also be wary that their company and products are being talked about online. Much of the information out there may be damaging to the company or even dangerous to the user. Correcting online misinformation requires technical writers who are both highly knowledgeable of the products themselves and fluent in the social media realm. As Dr. Schwartz warns, "Technical Writers and documentation professionals who are not intimately familiar with the products they write about will become redundant."

With so much potentially useful content out there, it is good sense for companies capitalize upon the vast knowledge base of a fervent user community. By connecting social media directly to the company's own documentation teams can participate in and exercise control over and the online chatter around their products and shape help content that is more responsive, relevant, and beneficial to both customers and the company.

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