

## Technical Documentation Outsourcing: Ten Tips for Success

- 1. Set the right budget.** Not all technical documentation projects are the same. Make sure your budget is consistent with your expectations and with the realities of your documentation services project. As with many other things in business and life, you get what you pay for. There is a large difference between simply revising a mature document for an interim product release and building a new set of product documentation. Similarly, graphics-intensive documents that require numerous review cycles, or documents for which source material is difficult to obtain, obviously require a greater investment.
- 2. Avoid the “last-minute” scramble:** Product documentation should be integrated into the product development cycle from its beginning. It’s not unusual for companies to spend time and effort on internal documentation – such as product requirements, specifications and engineering change notices – and to delay producing customer and user documentation so long that the product release date is jeopardized.
- 3. Get buy-in from subject matter experts:** High-quality product documentation relies on the participation of the in-house staff with expert knowledge. They must actively participate with the technical documentation services vendor in the collection, review and approval of technical details. No technical writer or technical documentation services firm, regardless of how good they are, can compensate for lack of participation and buy-in from the Subject Matter Experts.
- 4. Define technical requirements:** Assuming your technical documentation services outsourcing provider has the exact IT infrastructure needed to run, test, and document your product is a risky assumption. Anticipate what is needed to replicate your product environment, whether high-tech or low-tech, and build those considerations into the planning.
- 5. Define realistic review and approval cycles:** Meeting deadlines requires everyone’s participation, and outsourcing technical documentation services does not eliminate the need for timely reviews and approvals. Make sure your documentation plan spells out the specific responsibilities of each reviewer. When you delegate final approval authority to the technical documentation services vendor, clearly define the criteria for acceptance of the technical document.
- 6. Define roles and responsibilities:** The vendor’s technical documentation services outsourcing team is an extension of your company’s capabilities. As such, there may be overlapping roles for which you assign final responsibility. For example, is the final document QA done by the vendor or by in-house resources?
- 7. Plan for localization:** Ignoring technical documentation translation can save some time and money early in the technical document development cycle but, inevitably, results in much higher costs later. Content intended for multiple global markets requires a specialized approach to writing, illustration, and formatting that can add time to the front end of the project. However, these costs are quickly recovered during the translation phase.

8. **Define audience and objectives:** Technical documentation is most efficient and cost-effective when it is designed to meet the needs of the target audience. Know the reading level, technical sophistication, and usage preferences of your document's audience. It is also critical to understand what the audience **needs** to know, versus what is non-essential, so that you don't waste time and cost developing and maintaining unnecessary information.
9. **Choose a seasoned, financially stable vendor:** An effective outsourcing organization requires an infrastructure that can scale to meet department and company needs. Look for evidence of mature accounting, operations, IT, and project management and a track record of success.
10. **Decide if project management is required:** Complex technical documentation projects usually have numerous milestones, with various dependencies, that make project management expertise essential. Make certain your technical documentation services provider can supply that expertise.