

WHITE PAPER

Understanding and Managing the SME / Technical Writer Relationship

Author: David Woody - ZAETRIC®

Introduction

In developing effective and useful technical or business documentation, interactive Subject Matter Expert (SME) involvement is an absolute necessity. Further, prioritization and use of SMEs time in today's challenging economic environment is also critical. Partnering a Technical Writer with a SME makes documentation development of complex technical or business information an effective and manageable process.

The document development process is, by its nature, a time-consuming task, especially for an over-burdened SME. A Technical Writer works with the SME to develop/write content, format document appearance, create graphics/illustrations and populates complex data into tables or graphs thus relieving this workload from the SME.

Using an on-demand Technical Writer is a cost effective solution. The Technical Writer possesses the skills and experience necessary to effectively liaise with the SME and perform the document creation process. The SME can now focus on other mission-critical activities of the business process or project. Once the document work is completed, the technical writing resource is no longer required.

Understanding the SME / Technical Writer Relationship

The purpose of technical writing is to communicate technical details and processes for a wide variety of occupational fields, taking the raw data from the SME and shaping that information into an easily-understandable documentation for a targeted readership. The raw data provided by SMEs can come in many forms; interviews, electronic files, handwritten notes, photographs, specification documents, personal observations and others.

The SME / Technical Writer relationship usually begins with an interview where the SME explains the purpose and scope of the document and supplies the source data the Technical Writer will use to begin document development. The Technical Writer prepares for the interview by researching the topic and having comprehensive, relevant questions for the SME.

One common approach in document development is for the Technical Writer to review the SME-provided source data and create a Table of Contents (TOC) outlining the major sections of the document. The TOC is submitted to the SME for review/comment/approval prior to further document development. Understanding and quantifying this document framework (the TOC) minimizes document development throughput time and maximizes the desired document content.

Managing the SME / Technical Writer Relationship

During the document development process it is crucial to have open lines of communications between the SME and Technical Writer. In order to product optimum results, each must understand their responsibility for maintaining this relationship. For the SME, they must take ownership of the document and the intellectual property it conveys, and as such are responsible for the completeness, usefulness and accuracy of the information contained in the document. Their input and active involvement is critical for creating a quality document.

The Technical Writer must communicate with the SME, asking questions as necessary; identify missing information and/or seeking clarification on technical or business issues. The Technical Writer's responsibility is to identify every piece of pertinent information from the source data before going back to the SME for further clarification. Typically, the Technical Writer develops the document as far as possible with the information provided and then approaches the SME with questions and clarifications that are focused on information not available in the source data provided. This approach minimizes; 1) time spent by the SME answering questions and 2) document development time.

When the Technical Writer completes the initial draft of the document, the SME reviews the document for technical correctness and marks up the document with revisions or additional content required. Based on this SME document review, the Technical Writer makes the requested revisions and resubmits the document for another SME review. This cycle of communication and review continues until the SME approves the document for release.

Benefits

Understanding and managing the SME / Technical Writer relationship will result in a streamlined document creation process that relieves the SME of burdensome, time consuming document development activities and does so with the use of a temporary resource.

A successful relationship between SME and the Technical Writer results in the Technical Writer gaining a deeper understanding of product knowledge, internal company processes and the expectations of the SME. The SME will have a reliable, trustworthy, on-demand resource that can handle the job and is familiar with the complexities of the company's document requirements. These "understandings" gained by the Technical Writer translate to faster, more cost-effective documentation development on current and future work.

The value-added benefit of a successful SME / Technical Writer relationship is the SME will be able to focus on tasks better suited to their expertise and the business' goals/profitability, instead of document development activities. The use of an on-demand Technical Writer will improve document development throughput time, reduce overhead cost and improve SME productivity which provides a positive contribution to company performance and profitability.