Getting Started in Consulting & Independent Contracting

This collection of essays, compiled and edited by Thomas Barker and Karen Steele, covers the business aspects of consulting and independent contracting in technical writing. The authors, members of the Consultants & Independent Contractors Special Interest Group of the Society for Technical Communication, have created this online book as a means of sharing information with persons considering careers as independent technical communicators.

Chapter 9. Working with Customers

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Introduction

How does the way we work with customers affect the success of our independent businesses? This chapter covers the quality of our customer relationships, getting the word out about our services and abilities, educating our customers, and using bottom line thinking to get what we want. Real life examples illustrate both positive and negative effects of the way we work with customers.

Customer Relationships

When we talk about working with customers, the first thing that usually comes to mind is our relationships with customers. It's true that the way the customer feels about you is one of the major factors in determining if that customer asks you back for a second, third, or fourth project. Keep in mind that "difficult" employees may not get promotions, but "difficult" contractors don't get work!

"Difficult" Contractors Don't Get Work

You can write your own definition of "difficult." And then you can work diligently to be excellent instead of difficult. Here are some items to consider:

- Do you offer superior customer service? Have you attended a customer relations training seminar? Do you practice what you learned?
- Do you practice common courtesies of being on time, saying please and thank you, returning phone calls, and responding to e-mail messages?
- Are you generally an upbeat person?
- Do you know what is going on in your customer's business, the local news, sports, and other topics that your customer is interested in?
- Do you take responsibility for your own work and for your own mistakes? Are you willing to help the customer "save face" when the situation warrants?
- Are you as competent in your work skills as you can possibly be? Do you keep up with emerging technology?

- Do you meet deadlines? Do you report progress as well as problems to your customer? Do you prevent surprises by sharing information while there is time to do something about it?
- Are you realistic about your fees? Can you estimate projects with accuracy? Do you occasionally do something for your customer without charging, such as making a special, bound copy of a document for your customer's boss or sending a rush document by courier? Do you have an unobtrusive way of letting the customer know that you did this?

You can probably write your own list of many additional items that affect your relationships with your customers. The point is this: Your customer relationships better be excellent if your business is going to be the most successful.

Getting the Word Out

Two buzzwords for the 90s are "networking" and "adding value." Both are part and parcel of letting your customers know what you can do for them. Getting the word out is another factor in working with customers.

Think about this: Your main job for a customer is (fill in whatever you do). What other kinds of work could you do for this customer? Every different kind of work you can do adds value to your services. But you also need to let your customer know that you have many talents.

Let's say that your main skill is writing software documentation for financial products. Perhaps you can also train users on the software. Or you might write an article about the new software for the company's newsletter. Training would be paid work. The article might be unpaid, but it might get you a contract to write a regular column for the newsletter or company magazine, or it might alert the director of another department that you have just the skills she needs for her documentation project.

The 80-20 Rule

Finding work is always on our minds as independents. How do you find work? One of the most productive ways is to follow the 80-20 Rule. The 80-20 Rule is also known as the Pareto Principle. It states that you should work first and most on those activities that will yield the biggest improvements.

Research by sales and marketing organizations shows that the 80-20 Rule applies to many business endeavors. Here are three examples I have read about:

- 80% of system errors come from 20% of functions. Eliminate the problems with the 20% and you reduce system errors by 80%.
- 80% of sales come from the best 20% of your customers.
- 80% of new sales come from existing customers while only 20% comes from new customers.

The 80-20 Rule for independents might read this way: **Spend 80% of your marketing time exploring possibilities with your existing customers and 20% of your marketing time finding new customers.**

The exact percentages aren't as important as the idea that your existing customers provide your best source for more work. It also makes sense to spend most of your marketing time finding opportunities with customers where you have the best relationships.

Using the 80-20 Rule can help you get the word out about what you can do for your customers.

Working for Fame or Working for Fortune

We have to work for pay (fortune) most of the time to keep our businesses afloat. In this section, you can explore some examples of getting the word out about paid projects. One effective way to get the word out is to do some work for free (that's work for fame and glory). You can explore examples of working for fame, too.

Working for Fortune

Imagine that your main project is writing software documentation for the data processing department of a large local company. Here are some suggestions for other paid projects with such a customer and for ways you might apply your skills to work for other companies:

- Is the documentation currently hard copy only? Might there be opportunities to develop online documentation?
- Do you enjoy being a teacher? Do you know how to train adults in the workplace? If so, you could be a trainer for new employees or groups of employees who need to use the software you are documenting.
- Do you have instructional design background? If so, you could develop the training guide or other training materials for the system.
- Do you always put together a style sheet or a style guide for each documentation project? Can you adapt these documents into a departmental style guide? Into the company style guide? Into a book about how and why to include style guides? (See, there's an example of taking your skills into paid work in another arena.)
- Did you subcontract the work to several other independents to meet the customer's deadline? If so, you were a project manager. Can you be the project manager for other projects for this customer?
- Have you inquired about which other departments develop documentation, do training, need style guides, etc.? Have you informally met the managers of other departments? Make an opportunity to have a more formal meeting with each of them to discuss their needs and ways you might help meet them. (See Educating Your Customer about Budget Busters in this chapter; also see Chapter 4, Tapping Into the Network).
- Are you an expert on WordPerfect? Do people ask you questions about how to do certain tasks? Could you hold short training sessions to demonstrate how to do tasks with WordPerfect that they may not know how to do? The same goes for any application that you know and which the customer's employees may need to learn.
- Are you interested in learning new applications? If you know a similar one, your learning curve will be pretty short. For example, if you know RoboHelp, you can learn to use DocToHelp fairly quickly. Tell the customer that you will take on a project that involves a new application at a discounted rate for a short time until you get up to speed; then resume work at your regular rate.
- If you enjoy training, you might even branch out into other areas such as sales training and management training.
- If you are talented with visual design and graphics, you may want to build that part of your business.
- Can you use your experience as the basis for a class at a local university, community college, or computer training center?

Working for Fame

Sometimes networking and adding value takes the form of volunteer work; that is, you don't get paid for it. You need to control the amount of free work you perform, always remembering that billable work is what keeps your business going, but think about these good reasons for doing work for fame and glory:

- It enhances your reputation.
- It gets the word out to people who might not know about you and your talents.
- It lets you expand your horizons.
- It enables you to learn new skills.

Here are some examples of volunteer work. How many more can you add?

- When you write an article for the company magazine, people in other departments may read it and think of you when they have a project. You can add the article to your portfolio, publish it in the newsletter of an industry organization, enter it in an STC competition, or reprint it in your chapter newsletter, all of which make you better known to your colleagues, who may think of you for future projects.

- If you get paid to write hardware installation guides, you might write up an introduction to the new hardware or develop a job aid to publish in the departmental newsletter. You might not get paid for the newsletter work, but you are giving yourself personal professional growth that can lead to new skills you can sell later. The company might ask you to be the newsletter editor for the company, a chunk of hours each month that you get paid for.
- Are you interested in becoming a Webmaster? Rather than risk your business while you learn, you might volunteer to build the Web site for your church, neighborhood association, or hobby organization. Once you have the skills, you can market yourself as a paid Webmaster.
- Do you want to explore the possibilities of starting a seminar consulting business? Serving as the program manager for your local STC chapter is a great way to learn the ins and outs of planning meetings and programs.
- You might volunteer to do the graphic design for one issue of a customer's newsletter. Let the editor know that you would consider paid work as the graphic designer for the company magazine or newsletter. Do the same for your chapter newsletter and use the materials in your portfolio.
- An acquaintance referred me to the editor of a small business newspaper here in St. Louis. The editor is looking for someone to write monthly articles on business issues. I'll follow up because it may give me a chance to spread the word about my services to a new audience. Do you write, or design, or proofread, or edit, for your local business publishers? When you get a bit of experience under your belt, you can ask to be paid.
- You could copy edit a "messy" issue of a customer's newsletter, magazine, brochure, or other business communications and tactfully give your improved results to the manager who you are working with. If you have a good relationship with the manager, he or she will be happy to forward it to the appropriate people or set up a meeting to discuss better communications and publications. I got a project by doing this. I'm revising a set of 100 form letters used by the Consumer Relations Department of my best customer. This project grew out of my work in the Training Department, where I saw one of these letters and made some suggestions about improving it to my manager. He passed the comments along, and now I have a project and another contact for work.
- Do you enjoy public speaking? You could volunteer to be a speaker on a topic of interest at a customer's staff meeting or at a meeting of the customer's professional organization. For example, I've talked about writing for a "lay audience" at a meeting of the Coalition of Technical Societies, a group made up of manufacturing and technical engineers. Maybe you also have a favorite charity. Does the charity have a speaker's bureau? Do you make presentations at your STC chapter meetings? At regional conferences? Experience could lead to paid speaking engagements.

Put your creative mind to work thinking of other ways to get the word out about the width and depth of your services.

One of the responsibilities of being a successful independent is knowing how much unpaid work you can do and still keep your business viable. Believe me, any independent could be a full-time volunteer worker with no trouble at all!

Checking Customer References

Potential customers may ask for references from you. This section examines why it's wise for you to ask for references from them before you make the decision to take on a new customer. Why should you ask for references from your customer? Consider these two reasons:

1. Getting paid for your work

2. Learning how the customer treats independents

Will You Get Paid?

You need to be paid for the work that you do if you are going to stay in business. Timely payments are critical to your cash flow. Large companies usually have policies about paying their contractors, and this policy varies from "when you present the invoice" up to 90 days. In the case of an independent's small business, a 45, 60, or 90 day wait for a paycheck could ruin your cash flow. Smaller companies may not have a payment policy. You need to be especially careful to find out how a small company plans to pay you.

Time Lag Problems

A friend who is an independent had an agreement with a company to invoice once a month for a new project. She started work on the project on January 1 and invoiced on the 31st. The company's policy was to pay in 90 days, not from the start of work, but from the invoice date, so my friend did not get her first paycheck until early May! When you are working full time hours on one project, you may not have time or energy to take on other work, and a four month lag makes a huge impact on cash flow.

Time Lag Solutions

- **Ask the person in charge.** Before you decide to accept a project from a new customer, ask the person in charge of the project about the payment policy. If this person does not know, ask if you can talk to someone in the financial department. Companies with nothing to hide will not mind your questions, and you need to know what you are committing to. A company with a long time lag might be willing to bend the rules for you, but you have to ask.

- **Ask for an up-front payment.** When the time lag is long, you may need to agree on an up-front payment. On one recent project that I was going to bill in three installments, I asked for the first payment upon signing of the contract, at which time I would begin work. I included my invoice with the letter of agreement. My invoices stipulate payment within 10 days. We signed the contract, the manager approved the invoice for payment, 10 days later I had a paycheck, and immediately began work. Everyone was happy.

- **Check on payment policies once a year.** It's also a good idea to ask existing customers about once a year if they have changed their payment policies. The beginning of this year, one of my best customers changed from paying on invoice to paying on purchase order with a 30-day wait, without telling me. When I inquired about a late payment, I was told that they had changed their policy. Now I have a purchase order number, but I left the 10-day notice on my billing form. The secretary who handles my invoices reminded the payment office about this, and they are paying within 10 days. Nice, but they won't do it unless you ask.

- **Watch small companies carefully.** Be especially vigilant about small companies. If they get into financial difficulty, they may delay paying their contractors. Keep tabs on how the company is doing. If a small company goes out of business, you might never get paid.

What to Do if a Payment Is Late

- **Always inquire about late payments.** When any payment from any customer is 2 days late, I call the person in charge. I'm very polite about the call. "I expected to receive a paycheck yesterday and I'm just checking to be sure you received my invoice." Be creative about following up. Fax a new invoice if yours got "lost." Say that you will be in their office tomorrow and would be happy to pick up your paycheck. Smile while you are talking to keep a cooperative and friendly tone in your voice. Call every day until you receive payment. Remember that squeaky wheels get the grease. I call it creative nagging.

- **Stopping work is effective.** Consider putting a clause in your contract about the right to stop work if payments are late. An action like stopping work is very effective, guaranteed to get the attention of the customer. I did it once, with a customer who I suspected was planning not to pay me. When I made the third phone call to ask about the second late payment, I reminded the customer that I would have to stop working on the project until I received a check. The customer accused me of blackmail and a few other unsavory things. I calmly held my ground, stopped working, and two days later, the check arrived. There were never any other late payments. The customer has not called me back for more work, but I did what I felt was fair.

How Does the Customer Treat Independents?

You will be a happier independent if you get answers to questions like these before you decide to work with a new customer:

- **What is the climate like?** Do they treat independents well, or do they stick them in a closet with a 286 PC and a folding chair? Once I had a project to write documentation and training on a new software product, and the manager thought it would be a good idea to put several people working on the same project in one big room so we could be together. Have you ever tried to concentrate on writing in a metropolitan bus station? As soon as I knew enough about the system, I took my notes and files and wrote at home where it was quiet.

- **Does the customer micro-manage you?** Customers who watch you all the time do not trust you. They believe that if they can't see you, you must not be working. Do they expect you to follow full-time hours and close supervision? If you are happy with a micro-manager, that's fine. If you are used to being treated like a fellow professional, you may want to think twice about accepting the project. Be aware also that the IRS may consider you an employee and not an independent if the customer makes all the decisions.

- **Are the reviewers and subject matter experts cooperative?** Do they return documents on time? Do they provide useful comments, or just OK everything without reading it? Are subject matter experts available and willing to talk to you? (See Getting Reviewers to Give You Useful Reviews)

- **Do they pay on time?** (See Will You Get Paid?)
- **Do they quibble about the rate you charge after you have signed an agreement?** I treat comments like this as an irritation that is best ignored the first time. If a customer complains again, I treat it as a signal that something is amiss and ask what is troubling the person.

- **Do they demand project rates, then change the parameters of the project and expect to pay no more?** Do they change the specifications mid-way through the project and expect you to eat the cost? I once did a computer based training project on a subcontract that called for an outline, first draft, customer review, revisions of the first draft, second customer review, second revisions, customer approval, and creation of camera-ready copy, all for a flat fee. Payments were scheduled after first draft, second revisions, and delivery of camera-ready copy. My first draft was so clean and accurate that the second review and second revisions were not needed. But the customer refused to make the second payment, stating that I did not do the second revision work, so did not deserve to be paid. In my opinion, that represented my profit! I will think long and hard about working for that company again on a project rate basis.

You can probably think of other questions that will help you decide if you and a customer are a good match.

How Do You Check on Customers?

Three methods have worked for me: calling the Better Business Bureau, asking fellow STC members, and talking to the references the customer provides.

- **Call the Better Business Bureau.** Inquire if there have been any complaints about the company. You won't get details, but if there have been several complaints, you might want to follow up with the customer before you decide to work for them. For example, let's say a window replacement company wants you to develop a four-color marketing brochure about their process. You call the BBB and discover that the company has had 20 complaints in the past 3 years, 7 settled to the consumer's satisfaction, 7 not settled, and 6 ended in dispute. Does this signal a potential problem for you? After all, if they don't keep promises when they're hoping to make money, why would they keep promises in situations where THEY have to pay? Is the product as good as they say it is? Are they having problems with cash flow from disputes? You have to decide.

- **Ask fellow STC members if they know anything about the company, the manager, or the group for whom you may work.** Maybe a member works at the company that wants to hire you as a contractor. Maybe a fellow CIC SIG member did a project for the company. If your chapter members have learned the value of collaborating, they will share information with you. Carefully evaluate what anyone tells you against what you find out directly from the customer. The information shared does not always have to be negative, but collaboration can save your business and theirs.

- **Call the references the customer provides for you.** If references do not do identical work for the customer, that's OK. For example, if you are a technical documentation specialist, you won't tread on the toes of a trainer or a programmer, and they may be willing to share information. Let the person know that you have talked to this customer and would appreciate some candid information about what it is like to work with them. If the person believes in collaboration, they will share what they have learned. In return, you can tell them how beneficial belonging to STC and the CIC SIG has been for you. You might even recruit a new STC member in the process! At the very least, you broaden your network of contacts about future work. If you are replacing someone on a project, you might ask the customer if you can call that person. The results could be very enlightening. On the other hand, if the company doesn't want you to call him or her, that could be a red flag.

Once, early in my independent business career, I accepted a project with a small consulting company. The project was specified to take about one month, with a small payment up front and the rest at the end. I was to be paid at an hourly rate. Well, the project dragged on and on, with more and more content added, more and more revisions, more and more responsibilities placed on my shoulders. I dutifully submitted invoices every two weeks, but did not see a paycheck after the first one. I was "too polite and shy" to ask where the money was. When the end finally came, the president of the consulting company stated that the project was unsatisfactory and they were not going to pay me. It took almost a year of letters from lawyers, threats to go to small claims court, and nightmares to get a settlement of about 75% of what I was owed. It was an expensive lesson, but one I intend to learn only once.

I had been too naive to demand payment and discuss the changes in the project before doing all the extra work. During the legal process, I got names of several other independents who has worked previously for this company. When I contacted them, I found that each one had had horrible experiences of one sort or another. Had I asked for references up front, I might have saved myself many, many headaches.

Educating Customers about Budget Busters

The design stage of any project enables you and your customer to make decisions about the "look and feel" of the final deliverable. While some of these decisions may be modified during the development stage because of new or better information coming to light, be aware that changes often affect the budget. You enhance your value to the customer by keeping tabs on the budget.

Media

Let's say your customer wants a user's guide to distribute with a customized software application. You reach an agreement for writing the manual and get to work. You complete the manual on time and are about to send it to production when the customer says she also wants to put it online. Maybe the application you used has the capability to convert a document to online format, but maybe it doesn't. Converting could be an expensive process requiring redesign, more time, and new resources. You can help educate your customer by asking more questions about media during the design stage so that you both can plan accordingly.

Translation

Translating any document involves extra resources on a project. Several years ago, I developed a set of training manuals for a year's worth of training. The set included a 1,000 page scripted leader's guide, a set of 75 overhead transparencies, and a 200 page participant's guide. After the first training session, the customer decided to have the materials translated into Spanish and Portuguese for use in their Pan American division.

I had happened to use a desktop publishing package that the translators could use (WordPerfect 5.2 for DOS, which was state-of-the-art at that time for Pan America.) My page design was such that the new languages fit on the pages, and the captions for graphics and tables expanded automatically. The translators needed explanations for only four items that were "local humor" or American slang expressions. I was extremely lucky on that project, and from it I learned to ask about possible translation during the design stage of any project. Generally, I find that applying good technical writing guidelines requires minimal other alterations for translating.

Lessons Learned about Translation

- Ask about translation plans before you accept the project.
- Avoid local humor and trendy slang.

- Design pages with plenty of white space.
- Allow for expansion of captions and table titles. (Most languages require more words than English.)
- Find a good resource on translation guidelines. STC has published several in recent issues of the Journal and Intercom.

Production

As soon as you accept a project that has hard copy deliverables, such as documentation or training manuals, the production coordinator wants to know the size of the manual, the paper stock, the type of tabs, and whether you are using any color in the job. Sometimes the production coordinator is you, but the need for this information is the same. Why?

Production Time

Production takes time. For example, here in St. Louis, Missouri, it takes about a month to get laminated, typeset tabs printed on both sides for standard 3-ring binders. But if you use paper tabs printed on only one side, the printer can run them right with the copying job. The laminated version lasts longer and makes it easy to find things in a manual front to back or back to front. The plain paper version is less expensive but the tabs fold over and the holes tear out.

Special Ordering

The production coordinator may need to order special paper ahead of time. I like to include a bit of color in printed training or documentation by using paper with a runhead in color. Sometimes we can use company letterhead. When you make these decisions up front, you can schedule the time for producing special paper, and you may be able to save on costs by ordering in bulk. You also design the job around these up-front parameters.

Last-Minute Changes

Last-minute changes to production decisions can drastically affect the budget for a project. In one case, I planned to use a company's stationery second sheets for the pages in a training manual. The second sheets had a company logo in color in the lower right corner, and since we were using single-sided printing, would work perfectly. I designed the margins and a footer with the page number and other footer information to coordinate with the logo. The manager approved the design. We ordered 10,000 sheets of the stationery at an extremely low price because of the size of the order.

Near the end of the project, the manager decided that he wanted the manuals printed two-sided on plain white paper to "make them smaller" and thus less expensive. I pointed out as tactfully as possible that this would require a time-consuming change in page layout, and that the paper should be heavier stock to accommodate the two-sided printing, and that there would probably be no savings. He didn't agree, and the project cost more than the original estimate. I learned to be more definite about these up-front items, including costs as well as various options during the design stage. I also review the design with the project manager at each stage of the project.

Online Projects

Online projects have production and distribution issues of their own. If a company changes its standard software vendor in the middle of your online documentation project, do you convert everything from old to new? How will you update the material once it goes online? Will the online information be available on the Internet or on a private network? What other online issues should you settle up front?

Educating Customers about Working Conditions

Other chapters discuss the different ways to work, choosing how to work and what to work with (refer to the Table of Contents for chapter topics). Let me suggest here that you do some hard thinking about these items, and figure out how working the way you want to also provides your customer with a bottom line benefit (See Using Bottom Line Thinking to Get What You Want). In other words, you need to figure out WIIFM (What's In It for Me), only from the customer's point of view.

Let me share with you examples from my own business and show you how I turn my preferences into benefits for my customers:

Where You Work: Onsite or Offsite

I prefer to work offsite; that is, at my home office. I like this situation because I can work without interruptions, I can work the hours I choose as long as I get the work done, and I have very low commuting costs. I don't need the social atmosphere of an office.

Here is what I tell my customers when they ask where I will do the work:

I work in my location and save you the cost of a work space and equipment. Most of my contacts with your experts are by telephone or e-mail, but I am available for meetings, demonstrations, and so on when you need me. I work without all the interruptions that can occur in a busy office such as yours, so my productivity rate is very high."

I'm sure you can make just as convincing an argument for working onsite. Just be sure that you are benefitting the customer. The customer really doesn't care if you are happy. The customer cares if he or she is happy. With so much emphasis on the wonders of the Internet, I'm surprised that many employers still feel that if they can't see you, you must not be working. But then, many companies are not even computerized.

Payment Options: W-2 or 1099

I prefer to have a 1099 working arrangement, in which I function as an independent contractor. The customer pays my rate and I take care of taxes and benefits. (LINK to Chapter 3. Picking the Right Kind of Employment) Some customers know the difference between W-2 and 1099, but others never deal with the financial side of projects. When I meet a new customer, here is what I tell them if they do not know the difference between temporary employees and independents:

"I prefer a 1099 arrangement. That way, you and your bookkeeping department do not have to deduct anything or fill out extra paperwork for taxes."

On the other hand, in a W-2 arrangement, the customer pays half of your unemployment tax along with withholding, so you get 7.5% more pay. Theoretically, anyway. Some companies have policies about the status of their outside resources. You need to find that out first. Some will modify the policy if you ask. Others won't. Be aware that only 1099 funds are eligible for tax-deferred contributions in a retirement plan. You can't count W-2 monies as part of your income for retirement contributions. Customers don't care about your retirement planning, but you should.

Software: Yours or Theirs

Some companies have corporate approved software that I must use for everything, even if the software is not the best choice for the task. If that is the case, I have to decide if I want the project or not. You certainly should ask if other software is an option when you feel strongly that a different package will do the job better or faster. Often I take on projects in which the only deliverable is a camera ready hard copy master. The software used to create the master does not matter, just as long as the quality is up to the customer's requirements.

If their software does not have the capability to create HTML codes, for example, and you need HTML to post the documentation on the Web, you should have one or two suggested packages to recommend. Do your homework and be prepared. When you help your customer learn, you help yourself to become indispensable.

Flexibility: Yours

Usually my customers agree that off site, 1099, and WordPerfect are the best solution. When a customer does not agree, I know that I can be flexible; you can be, too:

- I can take a very short term onsite project and not jeopardize my contacts with other customers.
- I can work as a temporary W-2 employee knowing that it's just another tax form to fill out. I have enough 1099 customers that I won't jeopardize the status of my independent business or my retirement planning.
- I can use Microsoft Word and Framemaker, as well as WordPerfect, and I can learn other software applications very quickly.

Flexibility about working conditions can help you become and remain successful as an independent.

Getting Reviewers to Give You Useful Reviews

One of the major frustrations of technical communicators is getting reviewers to make useable comments and getting those reviews back on time.

Honoring the Talents of Others So That They Can Honor Yours

I've learned that subject matter experts (SMEs), whether engineers, programmers, lawyers, or other professionals, sometimes perceive the technical communicator as "a know-it-all" because we change their words. For example, an engineer who wrote the original specifications may feel that because she understands all these technical items, the end users should, too. The engineer may not realize that end users do not understand acronyms and esoteric terminology. Or a programmer may have written the first set of documentation and have an ownership issue with changes.

Also, SMEs may not get much recognition for their hard work on a project and are reluctant to take on more work just because you ask them to. Their managers may expect them to take time out from what they like to do to read a user manual or to do reviews "after hours."

When you can get involved with a project at the beginning, you can encourage the customer to build review time into the schedule. You can also tell the customer, the engineers, the programmers, and anyone else who works on the project that you are not the expert in engineering or programming or whatever, but that you are the expert in how end users think, read, and use documentation or training material. Tell them that you are relying on their expertise for correct content and easy functionality, and you hope they will trust you with the usability of the manual. In other words, honor the talents of others so that they will honor yours.

No Useful Comments: Problem and Solutions

Sometimes reviewers send document back with a note, "Looks really great!" And you think, "Well of course it looks great, but is it correct?" Desktop publishing packages, Web page design software, and multimedia authoring systems enable us to create truly lovely and exciting pages or screens. The beautiful appearance can fool a reviewer into thinking it is not necessary to read the words and check the figures. You do not want to be responsible for the correctness of the content in your projects, but if your project gets out there with mistakes, you look like a fool regardless of who is responsible. So, warn your reviewers that the pages may be beautiful, but that they still need to check the content.

If you are distributing paper copy to reviewers, you might try asking them to follow these tips:

- **Write comments directly on the pages.** Use a color different from the print. Green, blue, red. Anything except pencil (too dim to see easily) or black (same as print color). An editor's pencil (transparent blue) is no good either unless they are editing a final, camera ready copy.
- **Tell the reviewers that you have deliberately included false information somewhere in the material, and their challenge is to find and correct it.** Try this with reviewers who you already know tend not to read your material. I did this once by including the names of the reviewers in graphic captions, by putting very

obviously incorrect, and funny, data in a chart, and so on. You have to know the people to make this technique work, but humor is better than nagging. Offer a prize (a highlighter, a pocket protector, a mouse pad) for the one who finds each error first. They'll read it and they'll read it fast.

For groups of reviewers you might try these ideas:

- Pass around one copy, each reviewer adding his or her own comments, like a round robin letter.
- Distribute separate copies, but enlist one person to consolidate the comments onto one copy before giving it back to you. This person can also settle conflicting comments. Send thank you notes to the reviewers and copy their managers when the project is over. Take everybody to lunch if you can afford it. Give them a pen with your company name on it.

Using Bottom Line Thinking to Get What You Want

Managers think in terms of impact on the "bottom line" of their financial statements when they evaluate strategy, when they change advertising, and when they make decisions about training, documentation, hardware and software changes. In other words, managers always consider the bottom line. To get what you want, you need to think in terms of bottom line, too. Not yours, but the customer's. Thinking this way takes creativity, but it isn't difficult once you get the hang of it.

In 1993, the STC funded a one-year project called, "Measuring the Value Added by Professional Technical Communicators." The study found that technical communicators add value in two vital ways: we increase benefits and we reduce costs. I've been applying the concepts with great success. The table below, taken from the 1Q95 issue of Technical Communication, summarizes some key examples.

Adding Value	
Increased Benefits	**Reduced Costs**
Increased productivity	Fewer support calls, thus lower support costs
More sales	Less need for training, thus lower training costs
More proposals won	Less time needed for translation, thus lower translation costs
More completed documents	Lower costs for writing, paper, printing, etc.
More users' problems identified early in the process	Developers convinced that they did not need all the documentation planned
	Fewer errors by users

Increasing Benefits or Reducing Costs

How do you turn this kind of thinking into work? By showing your customers how you can make money or save money for them. Here, you have to do your own information gathering, listening, and strategic thinking. Let me give you two examples.

Example 1. Instructional Design & Documentation Specialist Selling to a Furniture Company

Mr. Smith's Furniture manufactures, markets, and sells a $2,500 electric massage chair that has been available for two years. The instructions for using it are in the form of a single page written at the last minute by the product engineer. When something goes wrong with the chair, consumers call Mr. Smith's customer service representative, who tells them how to use it or arranges for in-home technicians to repair it. The company is ready to manufacture a new, improved version, and the company president has called me, the ID&D specialist, to discuss a new set of instructions.

Among the questions I ask are these:

Q: What are the most frequent problems with the chair?

A: Well, the remote keypad breaks too often. Consumers have difficulty tilting the chair to the upright position, and they complain about the different massage functions not working.

Q: Mr. Smith, it sounds like the keypad problem might be solved with a better design, and I know a graphic designer who could help us with that. Also, if improved, simpler instructions could prevent several of the other problems, thus **reducing your cost of in-home service and long distance phone charges**, would you be interested in my services?

A: I sure would. That sounds like what I had in mind.

Example 2: Graphic Designer Selling to the Same Furniture Company

I arrange for my associate, a graphic designer, to meet with Mr. Smith. Among the questions the graphic designer asks are these:

Q: What are the most frequent problems with the chair?

A: Well, the remote keypad breaks too often. Consumers have difficulty tilting the chair to the upright position, and they complain about the different massage functions not working.

Q: When I tried out the chair, I found the same problems. I think that an illustration showing how to tilt the back up and down would help. Also, I'd like to see a the keypad design and the control buttons on the chair that tell the users exactly how to get the various functions to turn on and off in whatever combination they want. We can combine illustrations with the new instructions, and we are just in time to fix the keypad since you are bringing out a new model.

These changes will help the users make the chair work and keep them from needing to call you for assistance, **reducing your time on customer service calls**. Would that meet your needs, Mr. Smith?

A: Yes, I think it would.

Do you see how both the instructional designer and the graphic designer started thinking about the customer's bottom line? Customer service is the most expensive end of the product cycle. If you can reduce costs, the customer saves money. You improve your relationship with the customer. You collaborate with fellow professionals. You make a sale of your services. Everybody is happy.