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# R E C O M M E N D A T I O N

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**Date:** 19 July 2005  
**To:** Director of Training, and Documentation Manager  
Client Company  
**From:** Lisbeth Shaw  
Cambridge Publications, Inc.  
**Subject:** Documentation Architecture Recommendation

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## EXECUTIVE SUMMARY

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Client engaged Cambridge Publications, Inc. (CPI) to define an architecture (roadmap) of documentation components that will provide knowledge support solutions for this rapidly growing company. CPI's conclusions and recommendations are contained in this report.

The following summarizes these conclusions and recommendations:

- **Conclusions:** Client has many urgent needs for knowledge support in both day-to-day operations and specific crisis situations, such as those that arise when field engineers are installing and configuring a system.
- **Recommendations:** Client should develop various manuals to support the field engineers in installing and configuring the system, and should start to develop methodologies and their supporting programs and materials for key business areas.

By developing these materials, Client will be able to:

- Address the most acute pain, which is in the area of installation and configuration of *<Product\_Name>*
- Put in place a knowledge infrastructure and system of best practices that will deliver for each business area the ability to have consistent, replicable, and scalable operations

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## PROJECT BACKGROUND

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*<Product\_Name>* provides mission-critical, end-to-end content management solutions—from content creation to management to delivery—for media and e-commerce companies. Client historically has had very little documentation. What documentation existed was frequently created to meet an immediate need, and was often out of date or inaccurate. When the company was smaller, with fewer customers and markets, this lack of documentation was not a hindrance. However, with Client's rapid growth in customer base, markets, and staff, new needs have arisen.

Client now wishes to address these new needs. As the first step toward addressing the situation, Client engaged CPI to define a documentation architecture to meet their knowledge support needs.

## THE PROJECT

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CPI conducted a series of interviews and discussions with senior- and mid-level managers to:

- Specifically identify the needs facing each business area and prioritize them
- Clarify both the context of the needs and the key elements of a knowledge strategy that could be implemented through strategic documentation components
- Help Client understand the strategic relevance of these documentation components in addressing the needs and underlying factors

For a list of interviewees, see Exhibit A.

## SUMMARY OF THE FINDINGS

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In the course of interviewing Client's management, CPI found that Client's most compelling needs are driven by these factors:

- **Rapid growth**, which requires the company to develop a new layer of senior and mid-level management. In the last couple of months, the company has hired both senior and mid-level managers, and now finds itself with new, unprecedented, and across-the-board knowledge and information needs. The lack of documentation exacerbates the organizational problems brought on by rapid growth.
- **A shortage of knowledgeable field engineering resources**, which is another consequence of rapid growth. Engineering resources are overextended even though Client is adding new staff. In addition, few people in the company understand the product fully. There is no formalized training or process to follow for installations. As a result, installations are problematic — “many don't work.”
- **Sales requirements**. The lack of documentation is a problem for Sales, particularly when prospective customers request documentation to help them evaluate the product ahead of time. Lack of documentation raises questions as to the company's credibility and maturity. Third-party partners require documentation as well, such as KPMG.
- **Customer requirements**. Historically, documentation has been an afterthought. All customers need easy-to-use, accurate product documentation, but Client has little, if any, to provide. Client's larger customers, in particular, demand certain levels of documentation.

## CONCLUSIONS

The top four needs in the company, in descending order, are as follows:

1. An internally distributed and endorsed overview of the product architecture
2. Development of clear and standardized installation and configuration procedures
3. Improved communication about <Product\_Name> both with customers and within the company
4. A clear, easy way to show how <Product\_Name> changes the way people work

A description of these and other needs is contained in Exhibit B.

## RECOMMENDATIONS

This table identifies and describes a prioritized set of documents that CPI recommends Client develop. The components are also mapped to their most important needs in an effort to address the problems and issues from which the needs arose. The final column represents preliminary estimates of the relative development difficulty of one component to another (1 = least difficult, 10 = most difficult).

Items currently under development are marked with an asterisk (\*).

Items that are most effective when accompanied by training are marked with a double asterisk (\*\*).

Document Component	Description (purpose)	Maps to Client Need	Relative Level of Devt. Effort
Architecture Overview*	High-level description of <Product_Name>'s architecture — the application infrastructure.  This overview can be included in the Installation Guide and can be reformatted for stand-alone purposes.	1 and 3	3
Installation Guide*	Step-by-step procedures for installing <Product_Name> and configuring the computer hardware. Addresses a default, standard configuration.	2	2.5
Configuration Reference Manual	Identifies and discusses all the configuration settings and choices that can be made in <Product_Name>.  Works in conjunction with the Installation Guide.	2	2
Configuration Methodology**	Based on a best practice, maps out the process, including phases and steps, for customizing the system configuration to accommodate customer requirements.	2,6,8, and 9	8
Sales Methodology**	Based on a best practice, maps out the process, including phases and steps, for the sales approach. Can include presales (identifying customer needs, capturing customer requirements, determining contract amount), the proposal process, and the contract process.	3,6,8, and 9	7.5

Document Component	Description (purpose)	Maps to Client Need	Relative Level of Devt. Effort
3 <sup>rd</sup> Party Partner Program**	A program that includes defining 3 <sup>rd</sup> party qualification requirements and implementing a knowledge support strategy (materials, systems, and training). This could involve re-using many of the methodologies and other documentation components.	3 and 6	7
Information Control System	Library function with change order management system	3,6,8, and 9	4.5 (to design and set up) 10 (to change culture)
Sales Script Per Market Profile	Provides a consistent way of talking to the customer about the product; targeted at specific customer profiles.	3,6, and 9	3
Technical Marketing Collateral	Brochures, data sheets, cut sheets, presentation slides, whitepapers, etc.	3 and 9	1
Implementation Methodology**	Based on a best practice, maps out the process, including phases and steps, for implementing <Product_Name>. This includes determining the impact of <Product_Name> on the customer's workflow and the impact of the customer's workflow on <Product_Name>, as well as integrating <Product_Name> with 3 <sup>rd</sup> party software.	4,6,8, and 9	10
Development Methodology	Structured approach to systematic development processes, including documentation of application development and controlled engineering changes.  <b>Note:</b> This ranked as a priority 2 for engineering.	5 and 6	9
QA Methodology	Defines a process that is integrated with Development	5,6, and 9	8.5
Competency Models	List and describe minimum basic competencies and proficiency levels for job titles.	7	2.5
Product documentation for new and existing products	User guides, reference manuals, Help systems, etc.		4-5

# Exhibit A

## INTERVIEWEES

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CPI conducted group interviews at the company headquarters with the following managers from the following departments:

- **Professional Services** — Vice President of Worldwide Professional Services, Director of Training, and Documentation Manager
- **Marketing** — Vice President of Marketing, Product Manager, Senior Product Marketing Manager, and two other marketing managers
- **Sales** — Director, Northeast Sales
- **Customer Support** — Senior Director of Solution Partners, Senior Customer Support Engineer, and Customer Support Manager
- **Engineering** — Senior Analyst, Director of Custom Engineering, and Senior. Manager of System Engineers

CPI separately interviewed the President & CEO.

## Exhibit B

### DETAILED FINDINGS

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This table shows the needs and the priority ranking given by each business area (Dept.), as well as the overall corporate ranking of these needs. This table summarizes The Client Needs Matrix—presented previously to Client — which identified both the needs and their underlying issues discovered in CPI’s interviews and discussions with Client managers.

Need	Dept.	Ranking	
		Dept.	Corporate
<b>Need 1: Overview of Architecture</b>			<b>1</b>
An architecture overview to show customers and partners the flow of the product “big picture”	Mktg	10	
	Partners	1	
	Sales	1	
	Eng	3	
Provide technical information (re: process, product characteristics/major product elements, functionality) more easily and understandably	Partners	1	
<b>Need 2: Installation and Configuration Procedures</b>			<b>2</b>
Step-by-step set of procedures for installation and configuration	Eng	1	
	Partners	2	

Need	Dept.	Ranking	
		Dept.	Corporate
<b>Need 3: Competency in Communicating</b>			<b>3</b>
Uniform approach to showing customers how product lets them manage different elements of content	Mktg	2	
Help prospective customers evaluate product ahead of time	Sales Partners	3 3	
Provide easy, controlled access to marketing material	CusSupt	6	
<b>Need 4: Impact of Product on Client Process</b>			<b>4</b>
A clear, easy way to show how the product changes the way people work	Eng Mkt CusSupt	1 3 6	
<b>Need 5: Product Information (Release Notes, Tech Bulletins)</b>			<b>5</b>
Have current information about differences between releases, bug fixes, and enhancements	Sales Partners	7 1	
Have notes, technical bulletins in timely manner	Sales	8	
<b>Need 6: Methods/Standards/Best Practices</b>			<b>6</b>
Define best practices to create uniform process improvements for each business unit	Sales Eng CusSupt Partners	3 2 3 1	

Need	Dept.	Ranking	
		Dept.	Corporate
<b>Need 7: Address Knowledge Gaps</b>			<b>7.5</b>
Address knowledge deficit; define minimum basic competencies	Mktg	9	7
	Eng	1	
Knowledge and skill-building for programmers	CusSupt	4	9
<b>Need 8: Knowledge Repository</b>			<b>8</b>
Make information easily accessible to all who need it	Eng	1	
	Mktg	1	
<b>Need 9: Customer Confidence</b>			<b>9</b>
From pre-sales to post-implementation, customer interaction with Client has not been solid, causing doubt in company, product, and ability to support	Sales	6	