

# Project Management for Writers

Sue Woolley and Penelope Goward describe their methodology for managing writing projects.

Anyone who has designed and written a complex document from scratch will have used project management principles whether they know it or not. If you fully understand the principles of creating complex documents you will be able to apply those principles to managing a writing project.

Writing projects are less complex than, say, road projects or major IT implementations, and can follow a well-defined process. We have developed a simple methodology, specifically for writing projects, called Project Management for Writers, or PMW.

Writing projects can be part of larger projects (for example a large IT project will probably have a major documentation component) or they can be stand-alone projects.

Even though writing projects are not typically as complex as large-scale infrastructure projects, a project management approach is still vital to give you the greatest chance of success.

## Four stages

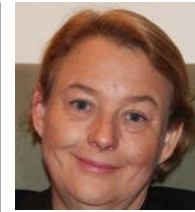
PMW consists of four different project stages:

- Concept
- Scoping
- Delivery and
- Closure.

See *Figure 1 Project Management for Writers - stages*.

At the end of each stage there is a go/no go “gate”, where the project sponsor has to decide whether the project should progress to the next stage.

Each stage has a set of core and optional documents that have to be developed.



Sue Woolley has been a technical writer for longer than she cares to remember. She has

worked on a number of projects and understands the importance of all types of planning in business. Sue is the ex-President of ASTC (Vic).



Penelope Goward has over 25 years of writing and project management experience in

business, education, health and IT. Pen is currently working in the higher-education sector on educational based web writing projects and academic editing. See [www.pengoward.com.au](http://www.pengoward.com.au).

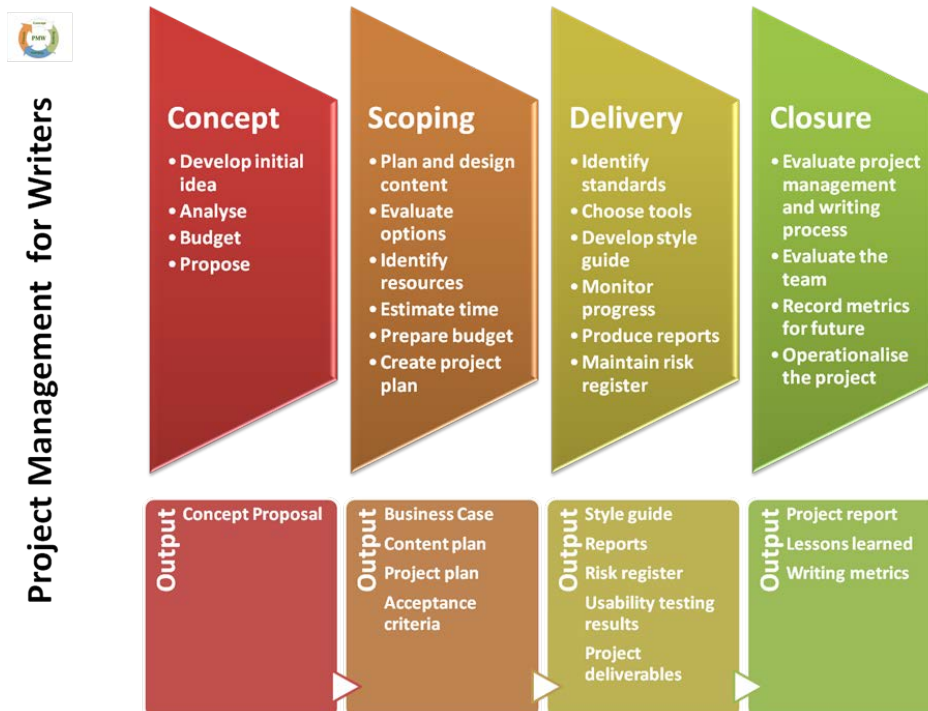


Figure 1. Project Management for Writers - stages

## Concept

All business projects start with an idea to either solve a problem or take advantage of an opportunity.

The Concept Proposal is the document where you formally propose your idea.

The Concept stage may be unnecessary. For example, the writing project may be part of a larger project, or someone else may have come up with the idea and you have been brought in to deliver it.

In the Concept stage you are estimating the time and money it will take to fully scope the project. You are NOT scoping the project itself.

The Concept Proposal includes estimates of the time it will take to:

- develop the content design and plan
- prepare the full project plan
- identify and develop the project acceptance criteria
- write the full business case.

You also need to estimate the funding required to complete the Scoping stage of the project. To work out the time and budget you need to consider the number of people days, whether the people required are internal or external, and the cost of any materials.

At the end of the Concept stage, you will have written a Concept Proposal which you then submit to the project sponsor for consideration.

Naturally the document needs to be clear, concise and very persuasive. The project sponsor can then make an informed decision about whether to finance the full scope of the project.

---

***All business projects start with an idea to either solve a problem or take advantage of an opportunity.***

---

## Scoping

The aim of the Scoping stage is to develop a full business case requesting approval from the project sponsor to start the project.

To develop a business case for a writing project, there are a number of specific tasks you need to undertake. You will need to prepare:

- content plan and design
- different possible options for the project
- resources required
- time estimates
- success measures
- budget
- risks
- project plan.

In complex projects each of these analyses would be delivered as separate documents supporting the business case. In simpler projects some or all of these can be incorporated into the business case document.

## Content plan and design

Designing the content is arguably the most critical part of scoping a writing project.

Some of the questions you need to ask yourself:

- What is the purpose of the content?
- Who is the audience (for example, skill level, role, level of education, fluency in English)?
- What tasks are the readers going to perform?
- What is the output medium going to be (paper, online help, web, video, single sourcing for multiple outputs)?

You then need to make a list of all the deliverables and decide which tools to use. Finally, you need to design the layout, presentation and navigation, taking into account:

- colours and fonts
- headings
- table of contents
- search capability
- index
- links.

## Options

When you are developing a business case, you will usually be asked to present several options for different levels of budget. For example, you could offer a staged approach to deliver the project so that the budget is spread over multiple years or you could tailor the level of detail in the deliverables to match the budget.

## Resources

Estimating resources can be tricky. You need to analyse the types of roles required for your project and the levels of experience that you will need. You may be able to manage with one or two highly experienced writers who can mentor writers with less experience.

When analysing the team roles, bear in mind that one person can fulfil multiple roles. Writing project roles may include:

- team leader / project manager
- writer
- editor
- indexer
- proof-reader
- graphic artist
- web developer
- usability tester
- instructional designer.

#### Time estimates

There is no defined formula for estimating how long it will take to write content. You need to ask yourself the following:

- What are the deliverables?
- How many topics are there? (Use the table of contents to determine the number of topics).
- How “dense” are the topics? Are the topics text-heavy or will they contain a lot of screen captures?
- What is the skill level of the writer developing the content?
- Is the content completely new or does it include legacy material?
- How many reviews and updates of each piece of content have been agreed with the project sponsor?

In order to estimate a writing task effectively you must start creating metrics for yourself. For example, how long does it take to write a new topic from scratch, taking into consideration the following:

- interviewing the subject matter expert and/or reviewing existing materials
- writing the topic
- editing and proofreading
- organising a peer review
- organising two reviews from the subject matter expert
- publishing the topic into its final form(s).

But remember, everyone is different, and you can't necessarily use your own metrics to estimate other people's timings.

#### Success measures

It is crucial to develop how you will measure the success of the project. Your measures must be SMART:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**ealistic
- **T**imed.

Developing SMART measures is actually a lot harder than it sounds!

#### Budget

When you are working out an estimate of the project cost you need to consider the cost of:

- staff – estimated timings and industry pay rates
- office equipment – desks, chairs
- IT hardware – computers, printers, networking, servers
- software / tools
- consumables – stationery, paper
- travel and accommodation
- training courses.

You also need to identify risks at the beginning of the project and cost them out. It is wise to allow a 10% contingency in the budget for unplanned expenditure.

#### Project plan

You can develop your project plan using a specialised tool such as MS Project. You can also use MS Excel quite effectively for project management – there are many very useful free templates on the Internet.

When preparing your project plan you need to include:

- tasks and schedule
- responsibilities
- critical dependencies
- project milestones (gates)
- deliverables.

#### Identify risks

Risks need to be identified **before** the project commences. Usually this is a team effort. Some consider it to be an art, but it mostly draws on years of project experience. Make sure you get additional training to do this well.

It is common to add an additional 10% to the budget to allow for unidentified risks.

What risks will prevent you from implementing on time and on budget?

Possible risks may include:

- team members leaving or falling ill
- subject matter experts being unavailable
- reviews arriving late
- software release date delays
- changes of scope.

Create a risk register before you start. As risks are identified, no matter how small, record, manage and work to mitigate them.

Changes are part of risk management. Develop a change management form that will assist in identifying how the changes will affect the project and also the business unit receiving the project deliverables. Calculate (time and money) the impact of any slippage as well.

It is important to keep records, not only for reporting on the current project, but also so you can draw upon the ideas and solutions for future use.

#### Business case

The key deliverable from the Scoping stage is the Business Case. This can be as simple as a one-pager incorporating all of the analysis or it can be a longer document with a set of supporting documents.

---

***Create a risk register before you start.  
As risks are identified...record, manage and work to mitigate them.***

---

## Delivery

The Delivery stage is where the nearly 60% of the work is done. As the project manager/team leader, you will no doubt also have writing responsibilities, so you need to be well organised and balance your management responsibilities with your writing responsibilities.

Most writing projects in the delivery phase follow a writing-development cycle tracked with these milestones:

- create draft(s)
- edit
- review
- revise
- sign-off by senior manager and/or project sponsor.

To ensure quality, you need to establish and manage the documents and the graphics with naming conventions, file management, security, and backup. You also need to develop a style guide for writing and editing consistency and accuracy. Quality is further enhanced if you can also have your documents usability tested from the beginning to the end of the project.

As the project manager you have the responsibility for managing team unity, team communications, staff hiring, and professional development. Managing people is challenging and requires training and experience. Make sure that you not only get basic training but continue to develop your skills with professional development and guidance.

As the documents are produced, the time taken to produce them should be tracked and monitored for quality. Identify, record and report risks and changes or additional requirements. Report and obtain sign-off by senior management and/or the project sponsor before moving on to further tasks or the next stage.

The key deliverables for this stage are primarily reports such as:

- progress and monitoring
- risk register
- change management
- usability testing results
- human resources (HR) team
- project deliverables – the actual documents.

## Closure

The Closure stage is rarely done well in our experience. Typically, as soon as a project has been delivered, the project team moves on without spending the time needed to close down the project.

To effectively close a project, you need to:

- evaluate the project management
- evaluate the writing process
- evaluate the team
- operationalise and hand over the project.

The main outputs from this stage are:

- a project report evaluating the management of the project, the team and the process

- a lessons learned report, which will hopefully be stored in a knowledgebase for the benefit of future project teams
- writing metrics that can be used to inform time estimations for future projects
- checklists for handing over the project and moving into production.

Even if this is done hurriedly, the opportunity to stop, reflect, record and learn for future projects is invaluable, and will contribute to your professional practice and development.

## PMW sample templates

We developed a number of templates to support the PMW methodology. The sections below show suggested section headings for the Concept Proposal, Business Case and Content Plan documents. Remember to keep them as short as possible. Managers typically don't have the time to read all the support material in order to make decisions. A one-page business plan is a winner if you can manage it!

### Concept Proposal section headings

<ul style="list-style-type: none"> <li>• Project name and description</li> <li>• Author</li> <li>• Date</li> <li>• Introduction</li> <li>• Problem / opportunity</li> <li>• Stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Proposed solution</li> <li>• Benefits / risks</li> <li>• Timeline for scoping</li> <li>• Funding required for scoping</li> <li>• Recommendation</li> </ul>
---	---

### Business Case section headings

<ul style="list-style-type: none"> <li>• Project name</li> <li>• Author</li> <li>• Problem / opportunity</li> <li>• Benefits</li> <li>• Options considered</li> <li>• Scope</li> <li>• Assumptions, constraints and dependencies</li> </ul>	<ul style="list-style-type: none"> <li>• Measures of success</li> <li>• Risks</li> <li>• Timeline</li> <li>• Stakeholders</li> <li>• Funding required</li> <li>• Recommendation</li> </ul>
---	--

### Content Plan section headings

<ul style="list-style-type: none"> <li>• Project name</li> <li>• Purpose of the content</li> <li>• Audience analysis</li> <li>• Task analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Output media</li> <li>• Deliverables</li> <li>• Design</li> <li>• Tools</li> </ul>
--	---

## In conclusion

As technical communicators we often only get hired at the beginning of the Delivery stage.

We must constantly strive to get ourselves into a position where we can be a part of the planning and scoping process of projects that involve writing components. We are the experts, and we need to be engaged at the very beginning to ensure success.