

Developing A Winning Project Plan

By Tanja Rosteck

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Writing a help file or user manual from scratch can be a daunting task. How do you know where to start, what information should be included, and how to gather it... who's responsible for what tasks and reviews... and how do you stay focused and on-track?

Without proper planning, these questions will haunt you at all stages of your work, wasting time and productivity at best. At worst, you'll produce a document that's late, over-budget, and hopelessly ineffective. Why risk that?

Here are some tips to ensure your project is properly planned and turns out successfully.

* Plan first, write later.

It's said that effective documentation is 70% planning and only 30% actual writing. Why is this? Because once you've done all the necessary research for your plan, coming up with an appropriate document outline is easy... and writing content based on the outline is easier still.

It can be very tempting to jump right into the writing, thinking the document outline will just create itself once you get going. Don't make that mistake! That kind of "creative process" is a time-waster and is guaranteed to veer you off-track.

* Learn about the product BEFORE writing the plan.

Project planning is much easier when you know exactly what you're dealing with. If you don't have at least a basic understanding of

the product you're documenting, it will be difficult to make accurate time and resource estimates.

Before starting your plan, take time to explore the product. Play around with it and test all the features. If you can spend some time with the tech support team, even better - it will provide good insight into how customers use the product and what problems they typically experience.

* First, decide on the goals for the project.

The defining element of a plan is the project goal. Without knowing where you need to end up, how can you decide how to get there?

For example, you might decide the goal of your project is to produce a help file that instructs end-users how to access and use the basic features of the program. By merely identifying that goal, you've already identified your target audience, purpose of the document, and what type of information should be included! Wasn't that easy?

* A good plan covers HOW, WHAT, WHY, WHEN, and WHO.

Now that you know the goals of the project, start filling in the blanks.

- HOW will the content be researched/gathered?
- WHAT information should be included? (Include content outline)
- WHY am I writing the document? (Re-affirm purpose of document)
- WHEN will it be delivered? (Include a detailed schedule, including review cycles)
- WHO are the readers and what is their level of expertise with the product?

* Get input from others on the plan.

Effective product documentation doesn't exist in a vacuum - it should serve the purposes of almost every department/function in a company (marketing, tech support, training, sales, and so on). Therefore, a help file or user manual should have everyone's input to some degree.

Each person or department will probably have their own idea of how the document should look and what information it should contain. But it's part of the technical writer's job to filter all this input and make the appropriate decisions. Always keep in mind what purpose the document will ultimately serve, and use that as your guide when resolving issues.

* Get all necessary approval and buy-in.

Getting everyone involved from the start is critical to a project's success. Don't risk missed deadlines down the road because someone didn't know what the schedule was, or that they were even involved!

Once you've written the project plan, distribute it to everyone you asked input from and meet with them to discuss it. Ensure everyone knows what is expected of them, and who they should talk to if there's a problem. And it goes without saying that every issue raised at the meeting must be adequately addressed - before it becomes an obstacle.

Now that you have a solid plan and everyone's on board, the writing can begin! At this stage, all the hard work is already done - all you have to do is follow the framework of the plan. Now isn't that easier than staring at a blank screen and wondering where to start?

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