Chapter 17
Collaborating with Customers Virtually to Improve Content

Mirhonda Studevant
Ceridian Corporation, USA

ABSTRACT

Writers often are challenged to measure the effectiveness of their deliverables. Measurement is frequently difficult because the writer is expected to act as a reader advocate without direct customer or audience input. Fortunately, this trend is changing. Today, technical writers have a wealth of opportunities to seek input directly from the internal or external consumers of their deliverables. In today’s globally competitive marketplace, organizations constantly strive to deliver high-quality goods and services. Many companies are recognizing customers as a critical strategic partner in their product development and quality improvement programs. This recognition of customers as development and quality partners extends to documentation resources such as training materials, web-based help, support knowledge bases, user manuals, quick-reference guides and virtual tours and tutorials. More and more, the voice of the customer is becoming the most important consideration in product and process decisions, including the delivery of documentation. Collaborating with customers goes beyond fostering goodwill. Employing various methods to invite customer collaboration accelerates documentation development and significantly improves documentation quality. By considering strategic partner values, organizational culture, cost and complexity, and availability of resources, technical writers can develop customer feedback programs that increase customer retention and positively impact revenue. This chapter explores methods and processes that help to ensure successful virtual collaboration with customers.

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**INTRODUCTION**

The following scenarios each reflect a company’s attempt to solicit feedback directly from the customer. Throughout this chapter, the terms “organization” or “company” are used interchangeably to indicate an information product provider. Similarly, references to “reader,” “user” or “customer” indicate information consumers:

One by one, a short chime announced each person and a small icon appeared online, next to each attendee’s name. After a brief round of introductions, Beth, the meeting facilitator, welcomed all the customers. For the next 45 minutes, Beth walked customers through several exercises that allowed them to highlight their current product likes and dislikes as well as future features for which they were willing to make an additional investment. By the following week, Beth translated her meeting notes into a prized list of findings, including organized lists of product, documentation, and training recommendations as well as a prioritized future feature list.

Kris was desperately trying to run a report that his manager needed by noon. While attempting to generate the report, Kris saw an error message he had never seen before. Desperate to find a solution, Kris searched the online help and found a topic that contained wording similar to, but not exactly like, the error message he had encountered. He followed the procedure and, thankfully, it worked! He wondered whether other users had ever had a similar situation and, if so, had they tried the advice in the help topic or had they assumed that it did not apply because of the slightly different wording of the error message? Just as he was about to close the online help topic, he saw a suggestion link. He sent a quick e-mail, explaining that the documented topic applied to multiple situations.

Julian absolutely loved the MindFrazzle gaming series. After joining their online gaming club, Julian was delighted to receive an invitation to try the unreleased Beta version of their latest game for free. An e-mail invitation stated that he would have 45 days of unlimited access to the game in exchange for completing a brief survey after the trial period.

Computer giant, Dell, uses councils and regional forums to stay in touch with customer needs. Dell’s largest customers in their U.S., European and Asian-Pacific markets share their views about Dell’s latest developments and product direction. Dell found that information gleaned from customers during these meetings greatly assist the company in forecasting product demand. (Thompson, Strickland & Gamble, C-124-C-125)

These scenarios indicate that technical writers often are challenged to measure the effectiveness of their deliverables. Measurement can be difficult because the technical writer may be expected to act as a reader advocate without direct customer or audience input. This lack of input can result in pseudo-collaboration with customers to improve the quality of writing. Fortunately, this trend is changing. Today, technical writers have a wealth of opportunities to seek input directly from their internal or external customers. In many cases, documents serve a dual purpose of being designed for external customers, but referenced by internal customers. For example, if a customer experiences an issue and contacts a support center, the support personnel may refer to a training or user guide to assist that customer. Another common example occurs when customers use a knowledge base that contains online diagnostic or troubleshooting information as an initial research step prior to contacting customer support. When customer feedback is sought and welcomed, customers do not have to resort to personal weblogs (blogs) or other potentially inefficient methods for complain-