FACILITATOR GUIDE

Introduction to Technical Writing

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Introduction

The Facilitator Guide is a companion document for the course called Introduction to Technical Writing. Its intended use is to guide facilitators in introducing and teaching others about the skills and techniques needed to become a good technical writer.

This guide also contains instructions on using a variety of handouts. We suggest that you review the handouts and either use them as is, or revise them to make them suitable for the course as you feel you might want to customize it.

Included in this guide are practical activities, reflective questions, and tools to deepen students understanding of the skills, tools, techniques, strategies, and mindset needed to become a good technical writer. It includes worksheets for students to do on their own and the accompanying PowerPoint presentation indicates how much time to allow for each worksheet to be completed.

While this guide provides the materials to facilitate the tasks described within, facilitators should also have a strong understanding of the requirements needed to become a good technical communicator, as well as experience using the tools and techniques described throughout the course.

Worksheet tasks are timed in the presentation to occur at approximately 20-minute intervals within the PowerPoint presentation. Time estimates are approximate and can vary due to audience size, levels of participation, and background knowledge. There is also time for collegial conversations included in each unit, so this time can be compressed rather than cutting off lecture time or participant work time.

Audience and Needs Addressed in Course

The following information was used in developing this course:

Audience is made up of retired Naval officers on their second careers as subject matter experts (SMEs) who are responsible for writing proposals, reports, and other documents describing Naval ships and equipment contained on the ships.

Average grade level of content is aimed at a grade level of 12th grade as these participants have a high school diploma and have attended some college classes.

Problems being addressed is as follows: audience never received training as technical writers and they want to understand how to do their job better. The course was developed to address some consistent issues supervisors have complained about such as word usage, problems with readability grade levels, problems working with comments and revisions, and others, so the material addresses these issues.

Use any extra time to either review additional tips and tricks in Word beyond what is taught in the class or on grammar and word usage.

Organization and Layout

This facilitator's guide is organized into eight modules based on a one-day, seven-hour course shown below. Each module is intended to address the needs of participants at various levels of learning. The accompanying slide presentation is broken up into the same modules for ease in working with the course materials.

This guide is structured for a one-day course but facilitators may also want to pick and choose from the various modules to work with audiences whose basic familiarity with the body of knowledge is more advanced that the basic audience the course was initially developed for. If facilitators choose to use the materials in this manner, we suggest they also be prepared to address some additional discussions on grammar and word usage strategies that in our experience will come up as part of this course on an ad hoc basis.

Modules	Time
1 Opening and Introductions	15 minutes
2 Introduction to Technical Writing	60 minutes
Break	
3 Understanding Your Role as a Technical Writer	45 minutes
4 Principles of Effective Technical Writing	45 minutes
5 Creating Different Types of Document Deliverables	45 minutes
Lunch	60 minutes
6 Mechanics of Technical Writing	90 minutes
Break	
6 Mechanics of Technical Writing Continued	60 minutes
7 Recommended Resources to Learn More	15 minutes
8 Closing and Questions	15 minutes

Planning and Materials

Prior to the class, perform the following tasks and obtain the listed materials. Print and check off each task as you perform it prior to leaving for the assignment.

Upon Receiving an Agreement to Teach This Course:

Task	✓
Negotiate payment and timing issues as well as the amount you will be paid to teach the course.	
Complete any paperwork needed for us to pay you. For instance, complete an F9 form if you are a 1099 vendor, or other paperwork to be paid as a W2 employee.	
Request a list of materials that you will need for the course and also any contact information for support staff at LinLaurie.com. At approximately 10-15 days prior to the scheduled class date you will receive contact information, address, and other information regarding site contacts and other relevant information.	
Verify that you understand and receive all course documents: PDFs, a copy of any workbooks, handouts, data files, and other materials for the course so you have adequate time to review the materials prior to the date of the course.	
Make any travel plans and book them (if required).	

One Month Prior to the Class:

Task	✓
Call or email us to verify that we have ordered any required workbooks or other materials for the course and where they are being sent to.	
If you are traveling to teach the class, and haven't already done so, call us for assistance in booking your travel and hotel needs.	

One Week Prior to the Class:

Task	✓
Reach out to the contact person listed on your confirmation email and verify the location, any desk configuration, equipment needed, and any other issues related to your needs for teaching the course.	
Verify that they have received any workbooks and other materials that were shipped to them for the class.	

Task	✓
Verify your parking arrangements.	
Verify the address and any specific sign in, requesting escorts and other information needed so that you can access the location.	
Verify any equipment requirements that you will need to supply to the location and then contact us to make sure the equipment is available for use.	

Day Before the Class:

Task	✓
Print all participant handouts, name tags, a sign in sheet, course evaluations, and certificates for all registered students. See Appendix A for a copy of the course evaluation.	
Pack your LCD Projector and Screen.	
Verify you have the correct slide presentation loaded on your laptop and that your laptop is in working order.	

Day of the Class:

Task	✓
Arrive at least 30 to 45 minutes prior to the scheduled start time.	
Perform any last-minute room arrangements.	
Set up your projector, laptop, and other equipment and verify they are in working order.	
Handout any workbooks or other materials at each station.	
Provide a sign in sheet so students can sign in before the start of class.	

At end of Class:

Task	✓
Pass out evaluations and request that they complete them. Explain the importance of getting them so we can assure the quality and satisfaction for the courses we teach.	
Pass out Certificates of Completion when students turn in their evaluations.	

Within 24 Hours of Course Completion:

Task	✓
Either scan and email course evaluations and sign in sheet to linlaurie1@hotmail.com or mail them to us at 2607 8th Avenue West, Seattle, WA 98119.	
Submit a bill for services at the same time you submit the evaluations. Send bill by email to linlaurie1@hotmail.com and make sure we have previously received a completed IRS F9 if working as a 1099 vendor or send your house in a timesheet if operating on a W2 basis.	
If you borrowed equipment from LinLauriel.com to teach the course, return it to our location in Seattle, WA 98119. No checks will be issued if any equipment is not returned in a timely manner.	

Overview of Modules

The following table describes the purpose of each module and how each builds upon the knowledge of the previous module to create a complete course.

Modules	Purpose	Introductory Content	Intermediate Content
1 Opening and Introductions	Module 1 provides an overview of the day, includes the outcomes expected, and provides students with an opportunity to ask essential questions.	• Session at a glance • Introduction • Essential questions • Logistics and schedule	
2 Introduction to Technical Writing	Module 2 provides participants with tools and worksheets to perform an internal inventory of personal traits, disposition, and general disposition to illustrate that they have right attributes to be a good technical writer and then it goes into the world of what technical writing is and at a high-level, describes the process to have them explore externally the technical writing environment.	• Technical writing definition • List of common deliverables • The Technical Writing Lifecycle defined • Inventory Your Personality Traits handout • Clearing up assumptions	• The Technical Writing Lifecycle defined
3 Understanding Your Role as a Technical Writer	Module 3 delves more deeply into the role of a technical writer and gives some specific learning about working with others to obtain technical content they may not understand but must write about.	• Required skills • Defining the steps to using critical thinking skills and the process for using them • Methods for establishing common ground with audience • Analyzing audience needs • Understanding and working with SMEs • Research techniques • Ethical and legal obligations and why	
4 Principles of Effective Technical Writing	Module 4 provides participants with principals and methodology for developing content.	• Methods for content development • Knowing audience needs when writing • Understanding organizational patterns	• Organizational patterns in document design • Elements of a good style guide

Modules	Purpose	Introductory Content	Intermediate Content
		• Why to use a style guide • Rules regarding word usage in business and technical writing • Using active voice in technical writing • Reasons for using a dictionary other than spelling	• Selecting a good reading level for content • Determining the purpose of a document
5 Creating Different Types of Document Deliverables	Module 5 teaches participants how to perform various types of audience analysis to determine the best type of deliverable needed to give the audience needed knowledge. It also reviews what types of information goes into various types of deliverables.	• List of documents discussed in this section • Definition of various types of analysis and which you should do to determine what type of document to deliver • How to perform content analysis • List of questions to ask for various subjects • Examples of each document type with each component labeled	
6 Mechanics of Technical Writing	Module 6 describes specific processes and procedures they can use to write technical content.	• Describe templates and styles in Word • Built-in styles and how to use them to create a TOC • Enabling readability statistics • Displaying the readability level of a document • Performing a spell check and grammar check on a document • Turning on track changes • Easily locating underdeveloped material or things you	• More readability discussions on importance

Modules	Purpose	Introductory Content	Intermediate Content
		need to fix before submitting a document for review • Submitting a document for review • Working with reviewer comments	
7 Recommended Resources to Learn More	Module 7 provides time for the facilitator to show existing style guides and other books that they feel are of value in working as a technical writer. A good example of resources to bring include a Chicago or API Manual of Style.	• Style Guide Show and Tell • Recommendations for other reading materials. • Any online materials to show students to encourage them to learn more. • Any additional courses we may have as a next step	
8 Closing and Questions	Module 8 provides the facilitator and participants time to review expectations captured during the beginning of the day to verify that student expectations were met and if not, to address, follow up, or get information to forward to LinLaurie.com management for later follow up.	• Address any expectations that weren't fully met during course if possible and if there is time • Course Evaluation Handout • Completion Certificate • Verify sign in sheet was completed by all attendees	

Module 1: Opening and Introductions

MODULE 1 – OPENINGS AND INTRODUCTIONS

The purpose of the opening and introduction is to provide participants with an overview of the day, including the outcomes, logistics, and essential questions.

PREPARATION / MATERIALS

- Workbooks
- Pen
- Notepaper

TIME

15 minutes

PARTICIPANT HANDOUTS

None

SLIDES

Slide 1 – Title Slide

Slide 2 – Logistics – Break and Lunch Schedule

Slide 3 – Agenda

Slide 4 – Introductions and Expectations for the Course

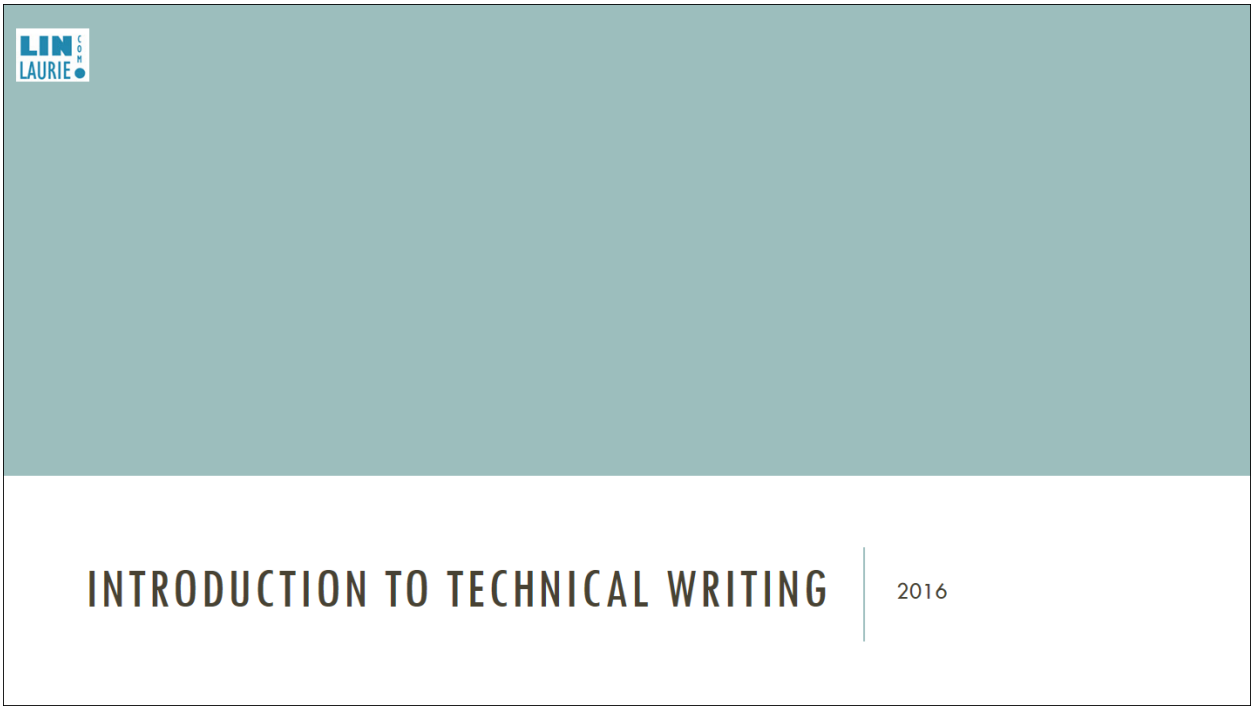
Suggested Process

1. Welcome the participants.
2. Introduce yourself and discuss any qualifications you have for teaching the course.
3. Call attention to **SLIDE 2** and discuss the break times, restroom breaks, locations, etc. Also mention lunch, any locations for taking lunch, and when students should return.
4. Review the **AGENDA** in **SLIDE 3**.
5. Mention any flexibility in timing of teaching the material and verify that the course is what is expected.
6. Call attention to **SLIDE 4**, and go around the room asking each student to tell the class their name, expectations, and experience to date around technical writing.

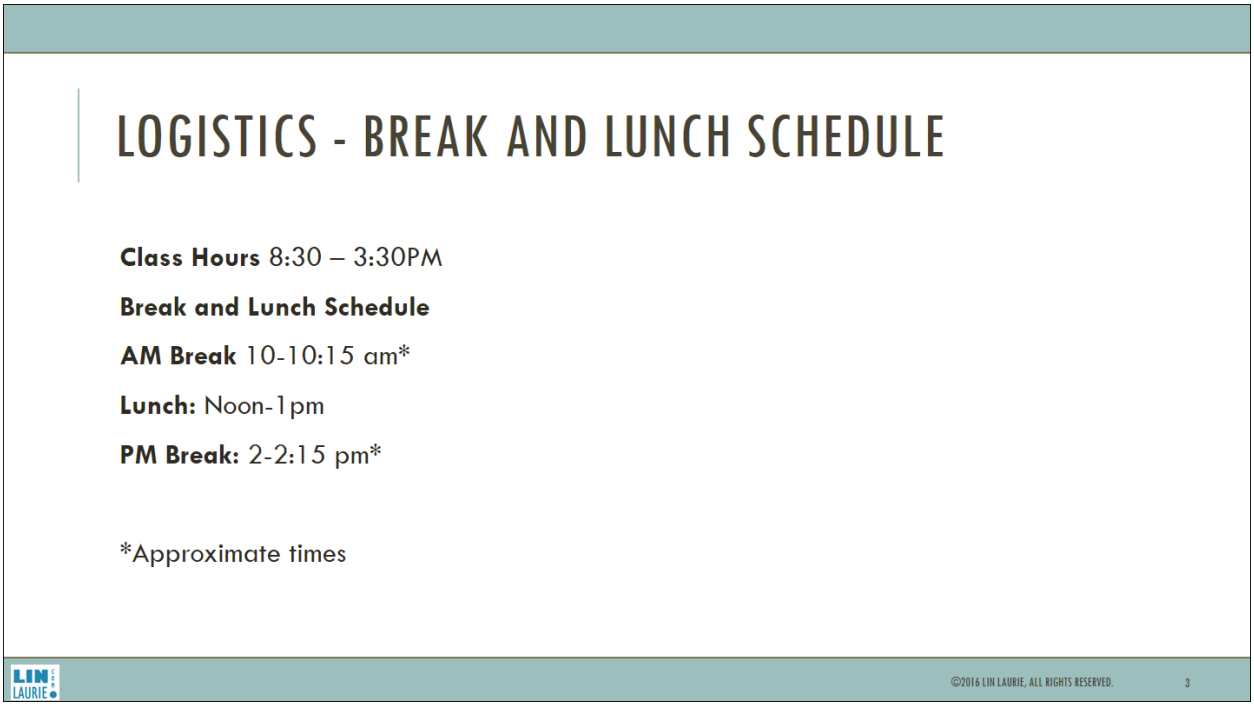
   This is an opportunity to course correct if the expectations of the participants are not aligned with the agenda. Also mention that you will be asking people to discuss their expectations for the course and will check back at the end of the day to make sure their expectations have been met.

Module 1 Opening and Introductions Slides

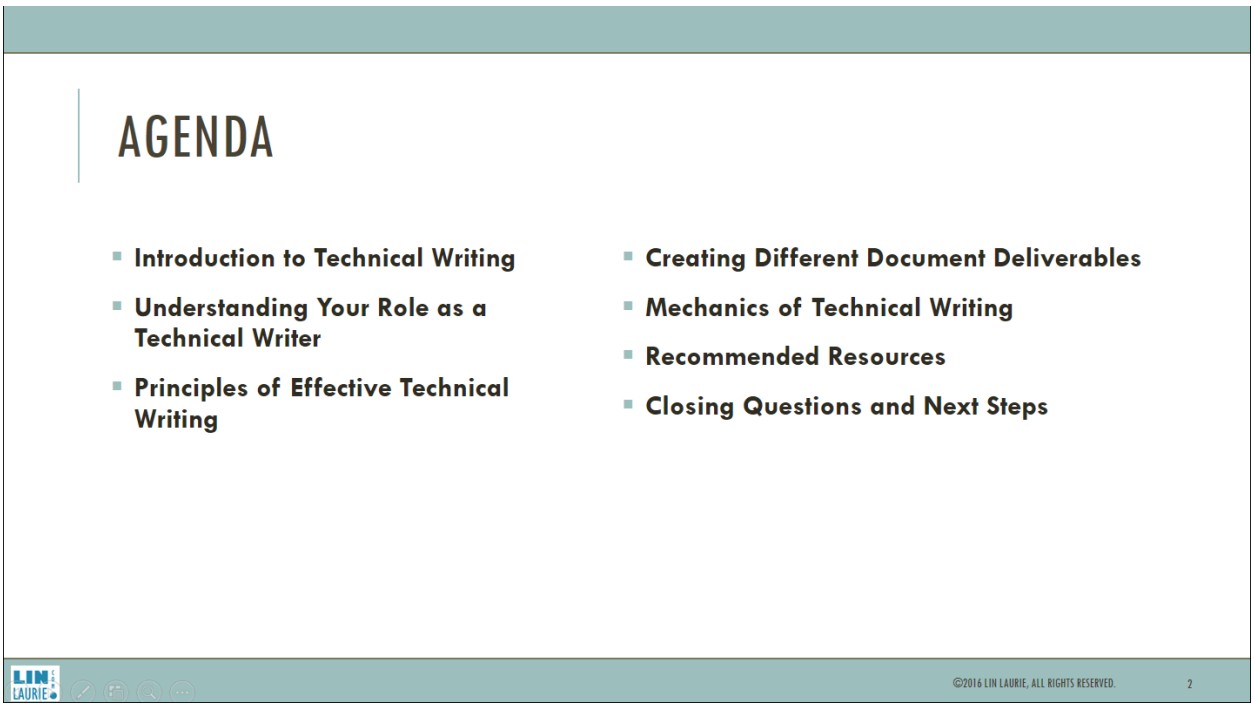
Slide 1 – Title Slide



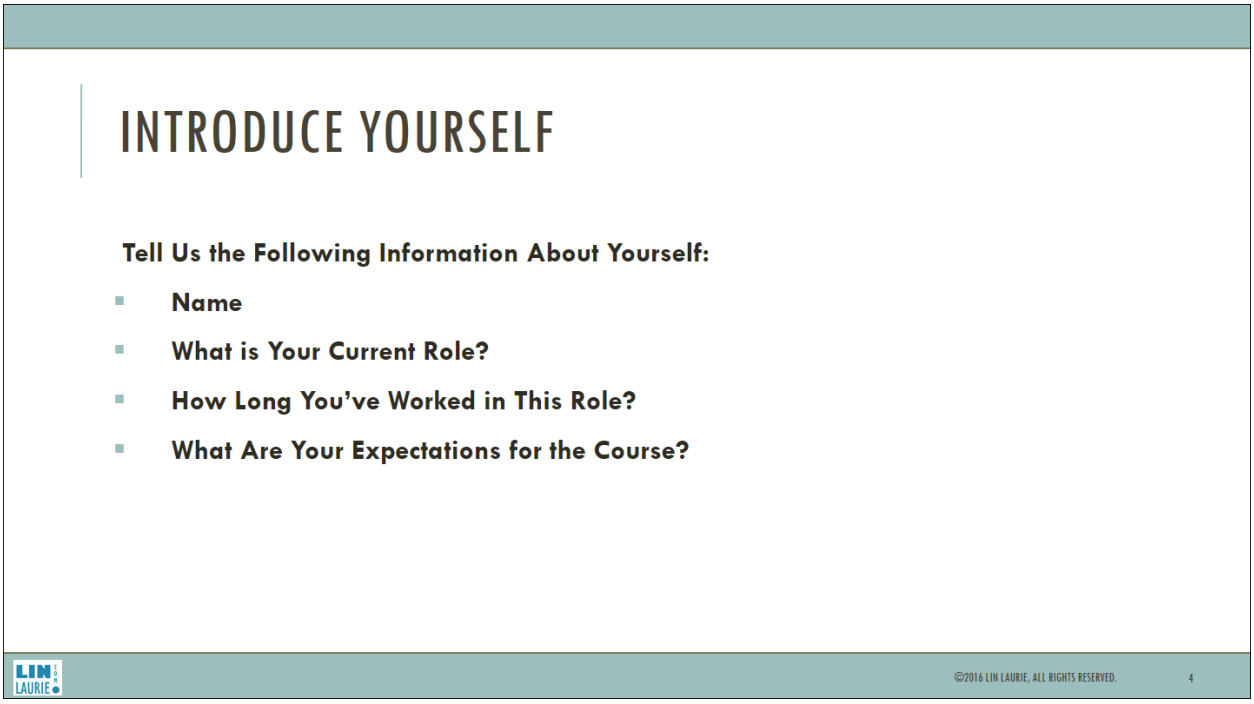
Slide 2 – Logistics



Slide 3 – Agenda



Slide 4 – Introduce Yourself



Module 2: Introduction to Technical Writing

MODULE 2 – INTRODUCTION TO TECHNICAL WRITING

The purpose of this module is to define what technical writing is, what it is not, to list a few of the most common technical writing deliverables, to introduce the Technical Writing Lifecycle, and to provide a handout for students to use in identifying personality traits that will help then become good technical writers if they understand and exploit them.

PREPARATION / MATERIALS	TIME
• Workbook • Pen • Notepaper	60 minutes

PARTICIPANT HANDOUTS

- Taking a Writing Inventory Handout

SLIDES

Slide 5 – Section Objectives

Slide 6 – Defining Technical Writing

Slide 7 – Types of Technical Writing Deliverables

Slide 8 – Profile of a Technical Writer

Slide 9 – The Technical Writing Lifecycle

Slide 10 – Taking a Personal Writing Inventory (Handout)

Slide 11 - Taking an Inventory of Your Other Traits

Slide 12 – Clearing Up Assumptions

Slide 13 – Section Check

Suggested Process

1. Page check with students so they are on page 7 in their workbook if they want to follow along with the slides.
2. Review the Section Objectives in **SLIDE 5**.
3. Discuss what Technical Writing is according The Society of Technical Communication in **SLIDE 6**.

4. Call attention the long list of possible deliverables listed in **SLIDE 7**, and then allow the students to describe the typical deliverables they will be working with.

5. Review **SLIDE 8,** and look at the positive description of what motivates people who become technical writers, stressing they are people who are motivated by the desire to help people avoid frustration and quickly find the answer to a question to help them perform a task. They need immediate answer and the technical writer's job is to get them that information as soon as possible.

6. In **SLIDE 9,** review each of the 7 processes involved in a standard technical writing development lifecycle.

7. In **SLIDE 10**, Review the five questions regarding how students feel about writing, criticism (editing) of their writing, and other tasks that are part of a standard content development process. Allow time for people to discuss this and share their feelings.

8. Distribute the **TAKING A TECHNICAL WRITING INVENTORY HANDOUT** and allow students 10 minutes to evaluate themselves and complete the handout. Then allow 5 minutes to review what students discovered about themselves from completing the handout.

9. Review **SLIDE 11** and have them use the form in their workbook to circle the qualities they feel they have that can help them in becoming a good technical writer.

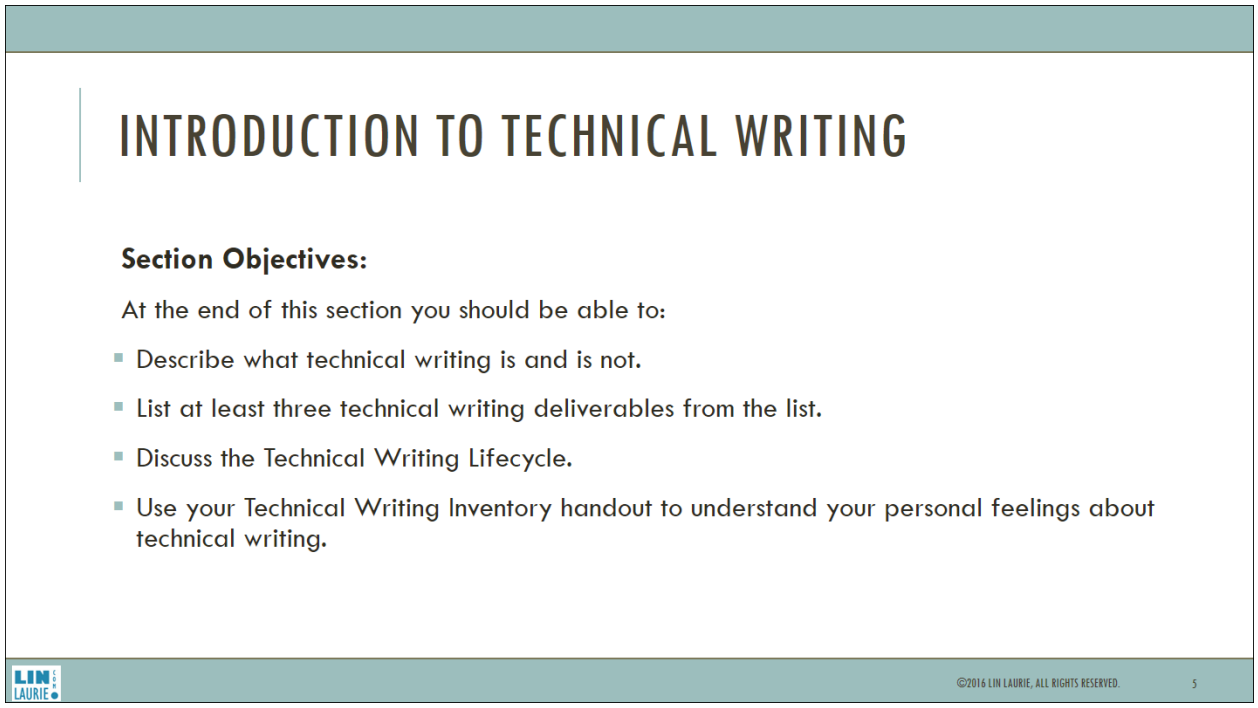
10. In **SLIDE 12,** review typical assumptions that people sometimes make when they consider becoming a technical writer. Ask students if they have any other assumptions about having a career as a technical writer and explore why or why not those assumptions are true or false and how they could contribute to your success at this career choice.

11. In **SLIDE 13**, review the section objectives to determine that students can now:

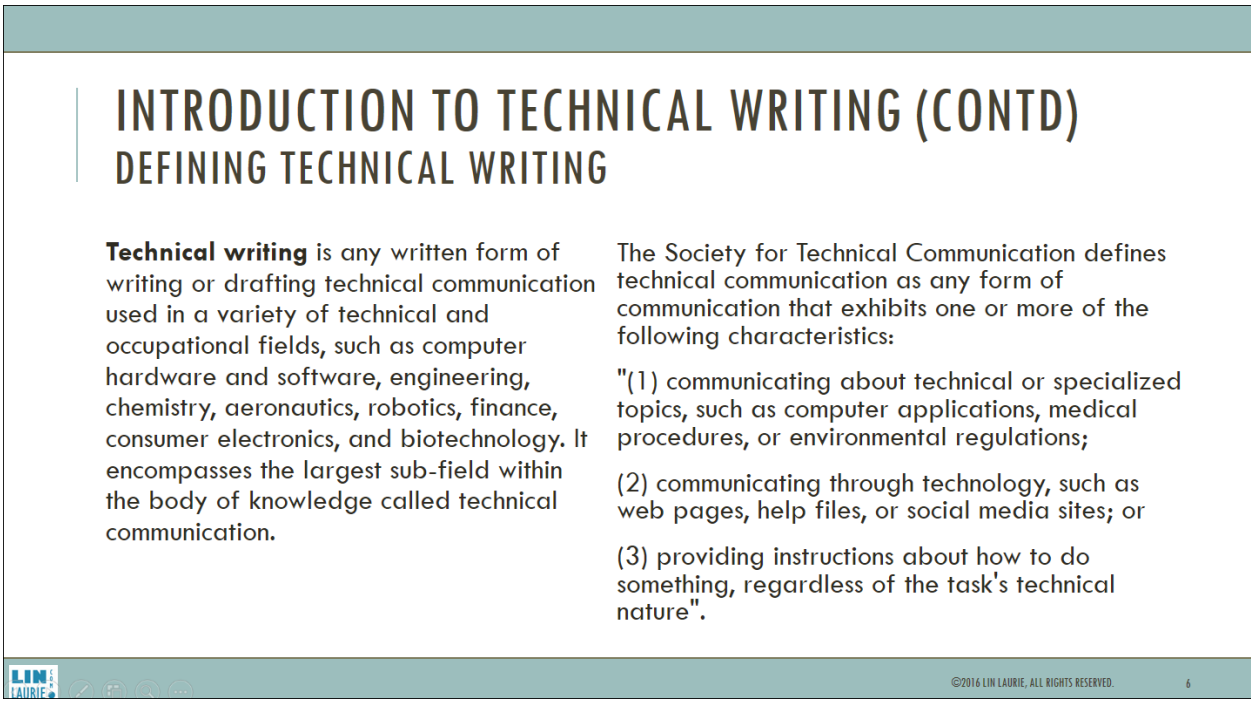
    - Describe what technical writing is and is not.
    - List at least three technical writing deliverables from the list.
    - Discuss the Technical Writing Lifecycle.
    - Have completed their Technical Writing Inventory handout and can now understand their personal feelings about technical writing as well as know which of their personality traits can facilitate their ability to become good technical writers.

Module 2 – Introduction to Technical Writing Slides

Slide 5 – Section Objectives



Slide 6 – Defining Technical Writing



Slide 7 – Types of Technical Writing Deliverables

INTRODUCTION TO TECHNICAL WRITING (CONTD)
TYPES OF TECHNICAL WRITING DELIVERABLES

- Contracts
- Customer Service scripts
- Demonstrations
- Design documents
- FAQs (Frequently Asked Questions)
- How-to videos
- Instructions
- Knowledge base articles
- Online and embedded help
- Policy documents
- Process flows
- Project documents
- Product catalogs
- Product packaging
- Proposals
- Release notes
- Reference guides
- Requirements specifications
- Simulations
- Training course materials
- User manuals
- Warning labels
- Web-based Training
- Websites
- White papers

Note: This is not an exhaustive list.

 7

Slide 8 – Profile of a Technical Writer

INTRODUCTION TO TECHNICAL WRITING (CONTD)
PROFILE OF A TECHNICAL WRITER

Here is the real profile of someone responsible for documenting how things work and how they should be used:

- You are someone who wants to save people from frustration, anger, and upset.
- You like to help people find information.
- You enjoy writing in a way that helps people understand complicated subjects.
- You like to empower others with information.

You are an unsung hero to your audience when you do your job well!

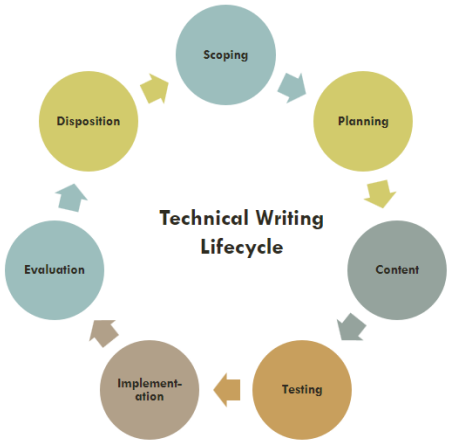
 8

Slide 9 – The Technical Writing Lifecycle

INTRODUCTION TO TECHNICAL WRITING (CONTD)
THE TECHNICAL WRITING LIFECYCLE

Technical writing follows a development lifecycle that often parallels an organization's product development lifecycle:

- **Scoping** – Identification of needs, audience(s), and scope
- **Planning** – Defining deliverables and resources
- **Content** – Includes research and content development
- **Testing** – Includes use cases (if appropriate), review, and revision
- **Implementation** – Includes delivery, rollouts, and production
- **Evaluation** – Includes feedback, post mortem, or document review
- **Disposition** – Includes future plans for the document (revision, archiving, or destruction)



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Slide 10 – Taking a Personal Writing Inventory (Handout)

INTRODUCTION TO TECHNICAL WRITING (CONTD)
TAKING A PERSONAL WRITING INVENTORY

- How do you feel about writing?
- How does it feel when you receive criticism of your writing?
- Can you separate yourself (your ego) from your work?
- Do you like revising and rewriting something you've already worked on?
- Can you let your work go before you feel it is perfect?

Use the **Taking a Writing Inventory handout** to evaluate your internal writing mindset!

Let's take out our Taking a Writing Inventory handout and spend the next 10 minutes evaluating how we feel about the writing process to see if this is really a field you'll enjoy working in.

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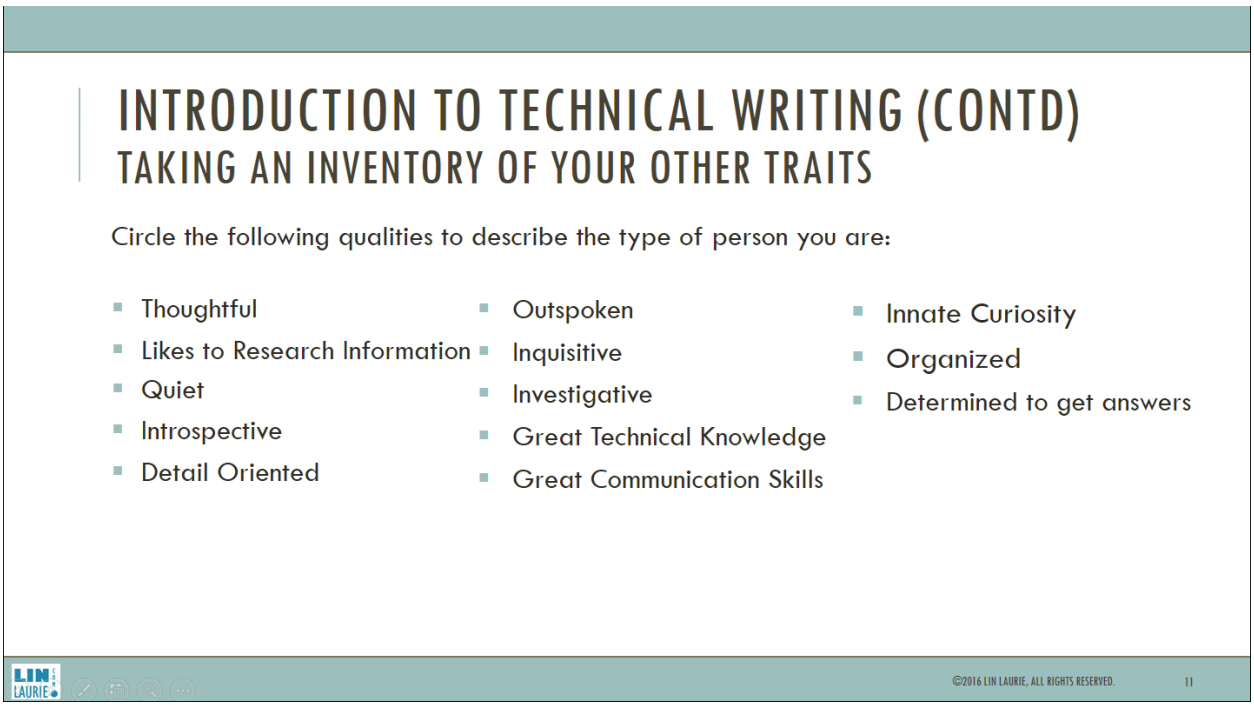
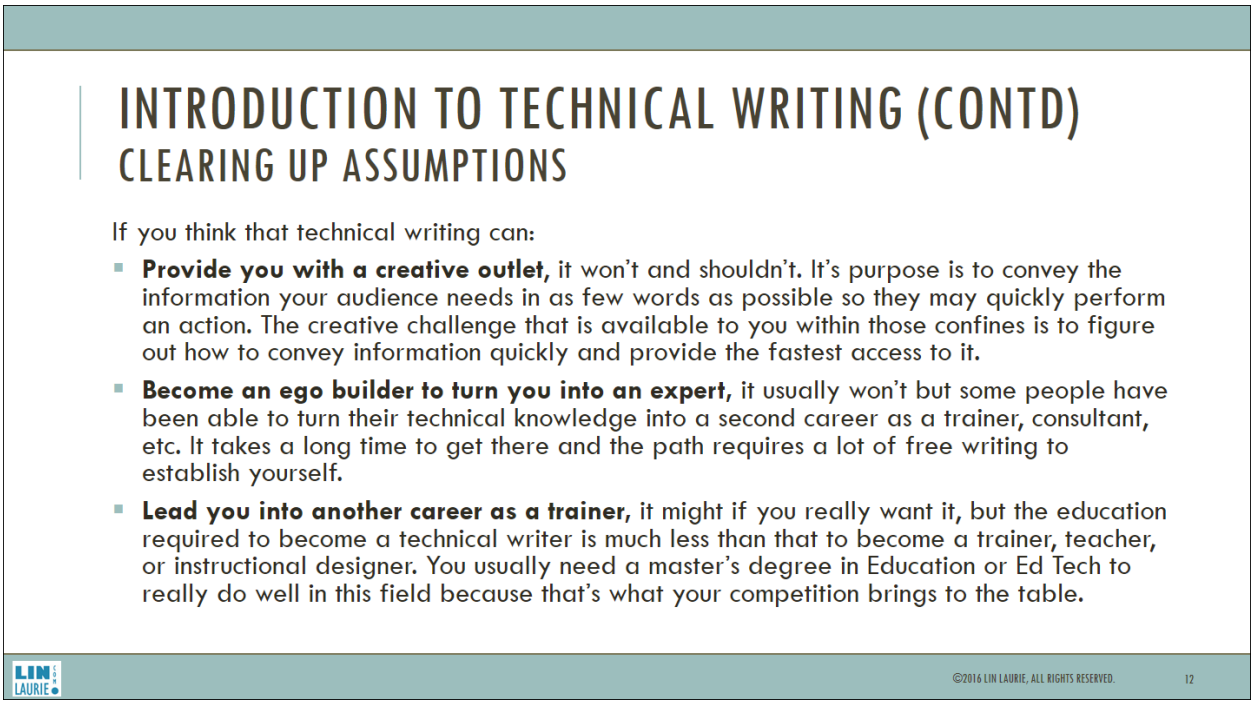
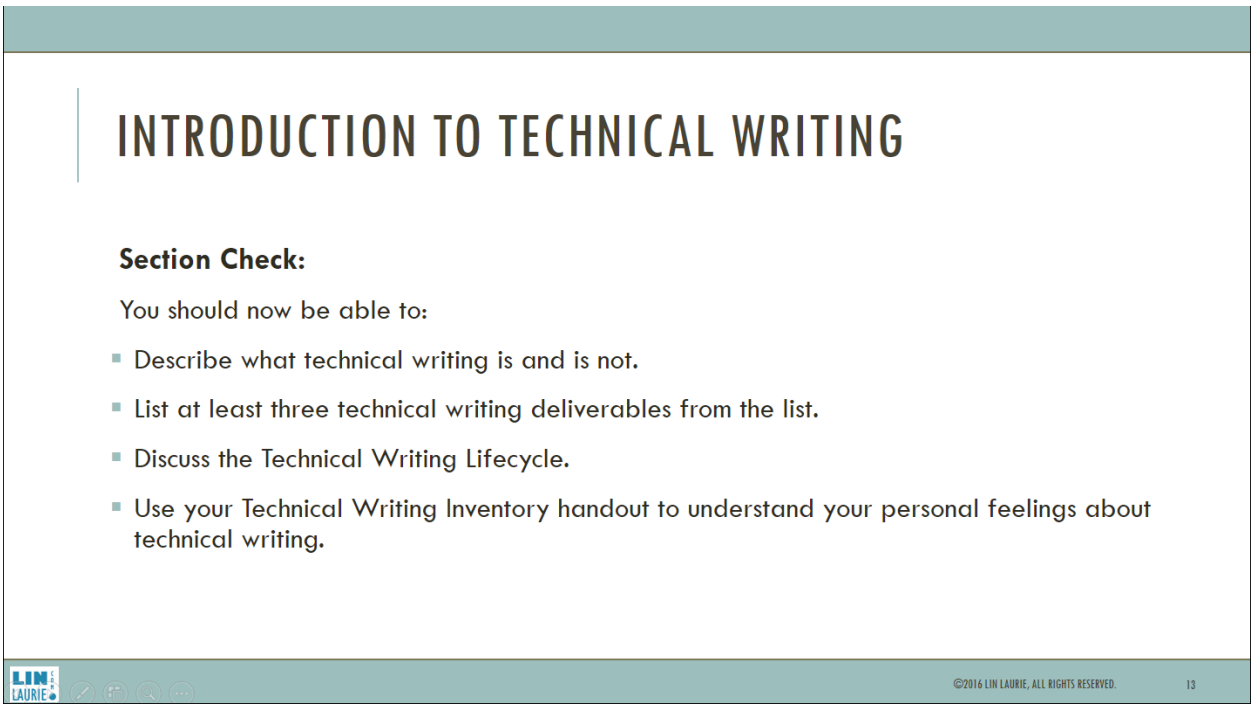
Slide 11 – Taking an Inventory of Your Other Traits



Slide 12 – Clearing Up Assumptions



Slide 13 – Section Check



Module 2 Handout - Taking a Personal Writing Inventory

2607 8th Avenue West
Seattle, WA 98119
(858) 736-7121

Taking a Personal Writing Inventory

Describe your background as a writer.
What kinds of writing were you most frequently asked to do in school--short reports, essays, journals, research papers, short stories? What sort of writing, if any, do you do on your own just for fun? Do you ever write poems, emails, blog posts, text messages, or Facebook entries? If you're working while enrolled in classes, what sort of writing is required by your job?

Describe what steps you follow during a typical writing project.
When you write, how do you get started? Are you in the habit of writing several drafts, or do you attempt to write a perfect paper right from the start? Do you spend a lot of time planning what you're going to say and how to organize it? Have you ever suffered from "writer's block," and if so how do you overcome it?

Identify your strengths and weaknesses as a writer.
Perhaps you don't have any trouble connecting and organizing your ideas, but you think that it takes too long to come up with those ideas in the first place. Or maybe you're satisfied that your writing is usually correct, but you feel it's not nearly as interesting as you'd like it to be. Be honest about your strengths and weaknesses as *you* perceive them.

Describe your attitude toward writing.
Is writing something that you usually enjoy doing, or is it just work? Are you interested in improving your writing skills? What connection (if any) do you see between good writing skills and success in your classes or your career?

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Instructions:

Print out the questionnaire, respond to each statement below by marking it A, B, or C:

A. I agree.
B. I am unsure or indifferent.
C. I disagree.

Respond to the statements thoughtfully and honestly. Your aim isn't to impress an instructor but to achieve a deeper understanding of your writing habits and attitudes. At the end of the questionnaire, you'll find out how to evaluate your responses.

Your Writing: Public and Private

Enjoyment

___ 1. I enjoy writing.

___ 2. The only time I write is when I'm required to.

___ 3. Writing something well gives me a sense of satisfaction.

___ 4. I don't think I write as well as most other people do.

___ 5. I sometimes write just for myself--to express my feelings or think out problems on paper.

___ 6. Having to write makes me nervous or afraid.

The Value of Writing

___ 7. I don't see the value of taking a writing course in college.

___ 8. The ability to write well will help me succeed in many college courses.

___ 9. In college, only English instructors care about good writing.

___ 10. I would rather take an objective test (multiple-choice or fill-in-the-blanks) than an essay examination.

___ 11. I try to avoid taking classes with instructors who give writing assignments (essays, reports, term papers).

___ 12. Writing a paper helps me understand a subject better than memorizing facts for an objective test.

"Good" Writing

___ 13. The ability to write well is a gift a person must be born with: either you've got it or you don't.

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Seattle, WA 98119
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___ 14. Being a good writer primarily involves knowing the rules of grammar, spelling, and punctuation.

___ 15. A good piece of writing should contain lots of difficult words and long sentences.

___ 16. Even experienced writers often have to work hard to make the words come out just right.

___ 17. A piece of writing can often be improved by reading it over, thinking about it, making changes, and writing it over again.

The Writing Process

___ 18. I usually don't like to reread something I've written.

___ 19. When I'm given a writing assignment, my mind often goes blank and I have trouble getting started.

___ 20. I write very slowly because I spend a lot of time worrying about correct grammar and spelling.

___ 21. When I sit down to write, I usually have plenty of good ideas, but I often have trouble putting those ideas into words.

___ 22. If I have enough time, I usually rewrite a paper (sometimes several times) until I'm satisfied with it.

___ 23. I like to show my writing to others for advice on how to improve it.

___ 24. I usually try to write a perfect paper the first time so I won't have to go back and rewrite it.

___ 25. If I take the time and make the effort, I can usually improve something I've written.

Evaluating Your Responses and Shaping a Positive Attitude

Count the number of positive statements, negative statements, and neutral statements in each section and notice which area you have the most agreements with. In reviewing your responses to this questionnaire, how would you define your overall attitude toward writing? What matters isn't whether you think you're a good writer or a bad one but the extent to which you're willing to work to become a *better* writer.

If you're convinced that good writing skills are unimportant or beyond your reach, you may lack the motivation to become a better writer. On the other hand, if you recognize the value of good writing skills and want to improve your own, *you're ready to learn*.

Appendix A

Course Evaluation

Course Name: _____Introduction to Technical Writing_____

Date of Course: _____ Name of Instructor: _____

Please complete this form to provide feedback regarding the course you took. You can provide contact information only if you would like to be contacted if we have any follow up questions regarding a comment you have made.

Rating	Poor	Fair	Average	Good	Very Good	Excellent	Comments
Instructor							
Was knowledgeable and enthusiastic about subject matter							
Encouraged student comments and questions							
Use techniques and tragedies that promoted student involvement							
Provided the right amount of detail							
Overall instructor rating							
Course Materials and Content							
Overall quality of course materials							
The course content matched the learning objectives							
The course length was sufficient to cover the content							
I would recommend this course to others?							
I will use what I learned in my work?							
I would take other courses from this company?							
Speed of course delivery was perfect							
Facilities							
This was a good facility for the class							
I would return to the facility for a future class							

Please write any additional comments about the class, your experience or suggestions on the back side of this document.