

# Calm the Chaos

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LESSONS LEARNED FROM LEADING AN UPSTART  
DOCUMENTATION INITIATIVE

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# What's this about?

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Share tips and takeaways from a 2-year project I led to deploy an internal content management tool at Salesforce

## Who is Frances?

Lead Technical Writer and Product Owner  
*Salesforce*, Internal Documentation - T&P, 2013-2017

Senior Technical Writer  
*Amazon*, Kindle, 2011-2013

Senior Technical Writer  
*Nintendo*, Engineering Services, 2007-2011

Content Business Manager and Technical Writer  
*Microsoft*, MSN, 2001-2007

# The Problem



## It's 2014

Technology & Products Internal Documentation team goal:

“Help technologists be wildly successful.”

But: The landscape makes success difficult at times.

Salesforce technologists use a variety of tools for work and documentation: Google docs, Google Sites, Google Drive, Chatter, Salesforce, variety of code tools; no federated search.

# The Question



## Where's the doc?

We did a **search survey** that showed:

Users are frustrated: hard to find docs; limited formatting options.

- There is no central doc repo or federated search
- Users spend 5-60 minutes daily trying to find needed content
- Majority of users lack confidence in the accuracy of docs found
- Total docs in Google Drive have almost doubled in the past 6 months
- There are hundreds of Google Sites pages – duplication of content and abandonment of sites are common issues

**Cruft is growing**

# The Need

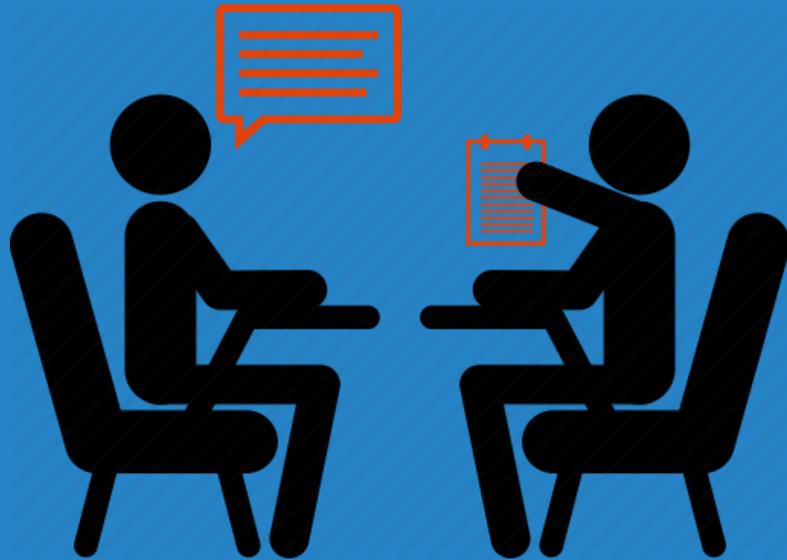


## Frustration is mounting

- No central doc management team; no common standards for how docs are created, labeled, stored, curated, or archived
- T&P Internal Documentation team can't keep up with the many website support requests we're receiving
- All of us are losing time trying to find resources we need to do our jobs.

**Something needs to change**

# The Approach



## Let's talk to our users

### Problem

Our internal doc tools are not meeting our publishing, workflow, discovery, and other content management-related needs.

### Goal

Be thorough and methodical.

Provide the **first-ever** formal analysis of the **internal documentation needs** across the Technology organization.



- Created list(s) of requirements and use cases
- Vetted tools against user requirements, enterprise constraints

# The Pitch



## How we pitched for funding

From the survey's results, created a detailed **Findings Report** that:

1. Provided a **compelling story**.  
(business needs, tools comparison)
2. Quantified **risk of inaction**.  
(trust, accuracy, compliance, scaling, morale)
3. Created a **value proposition**.  
(time lost x cost/man hours = \$\$ lost).
4. Got **support from champions** (other teams).
5. Pitched to the decision-makers:

**Now's the time**

to improve how we manage internal documentation

# The Greenlight



## We got funding!



Welcome to Confluence



Confluence is where your team collaborates and shares knowledge—create, share and discuss your files, ideas, minutes, specs, mockups, diagrams, and projects.

## Confluence

- Familiar, easy to use
- Customizable
- Extensible
- Server version
- Workflow
- Granular permissions

# The Deployment



It's mid-2015

## The fun begins

Now we need to manage installation of the app on company servers (VMs), in a data center...

and administer it...

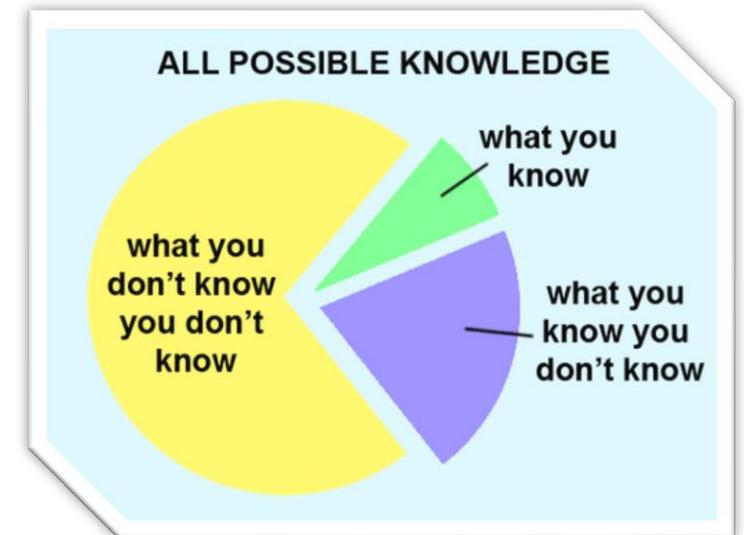
## Embrace the phrase

"This is all new to me."

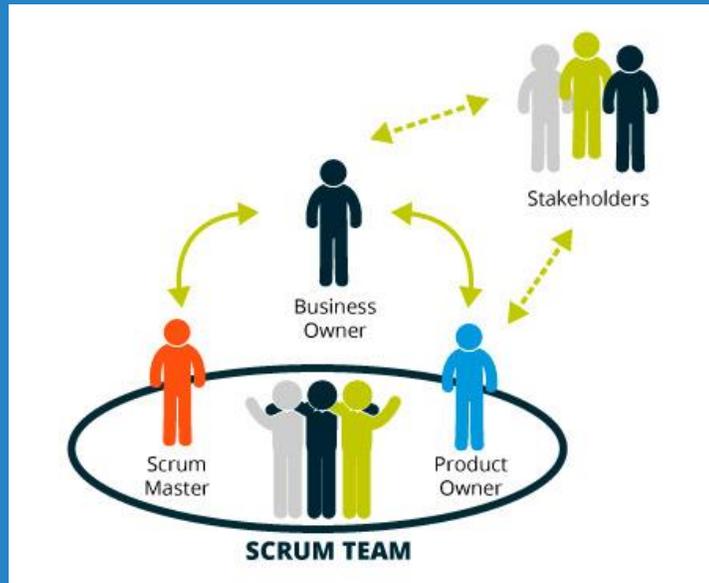
("Can you help me with...?")

## Expect

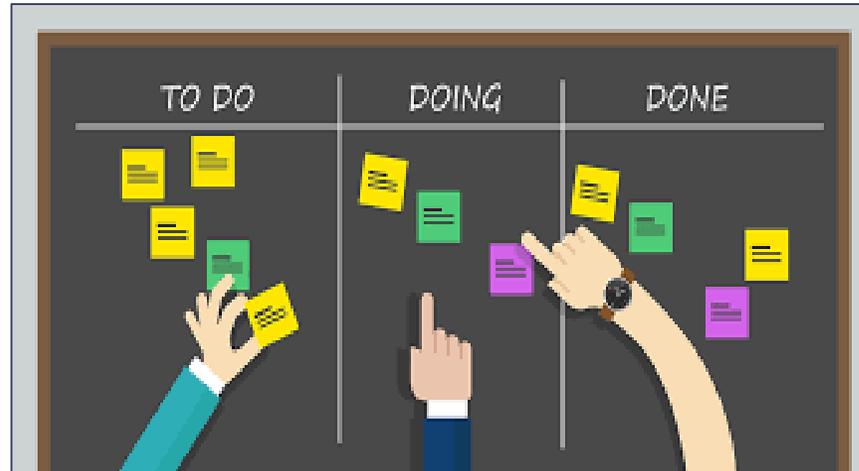
"What you don't know you don't know."



# The Scrum Team



# Be Agile Use Kanban



## Epic Themes

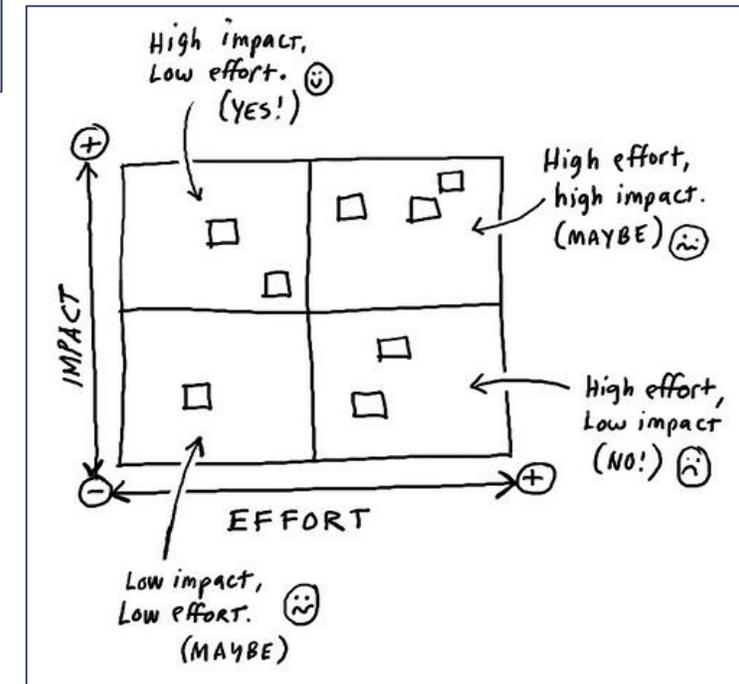
- Service Definition
- Growth
- Governance
- Content Strategy



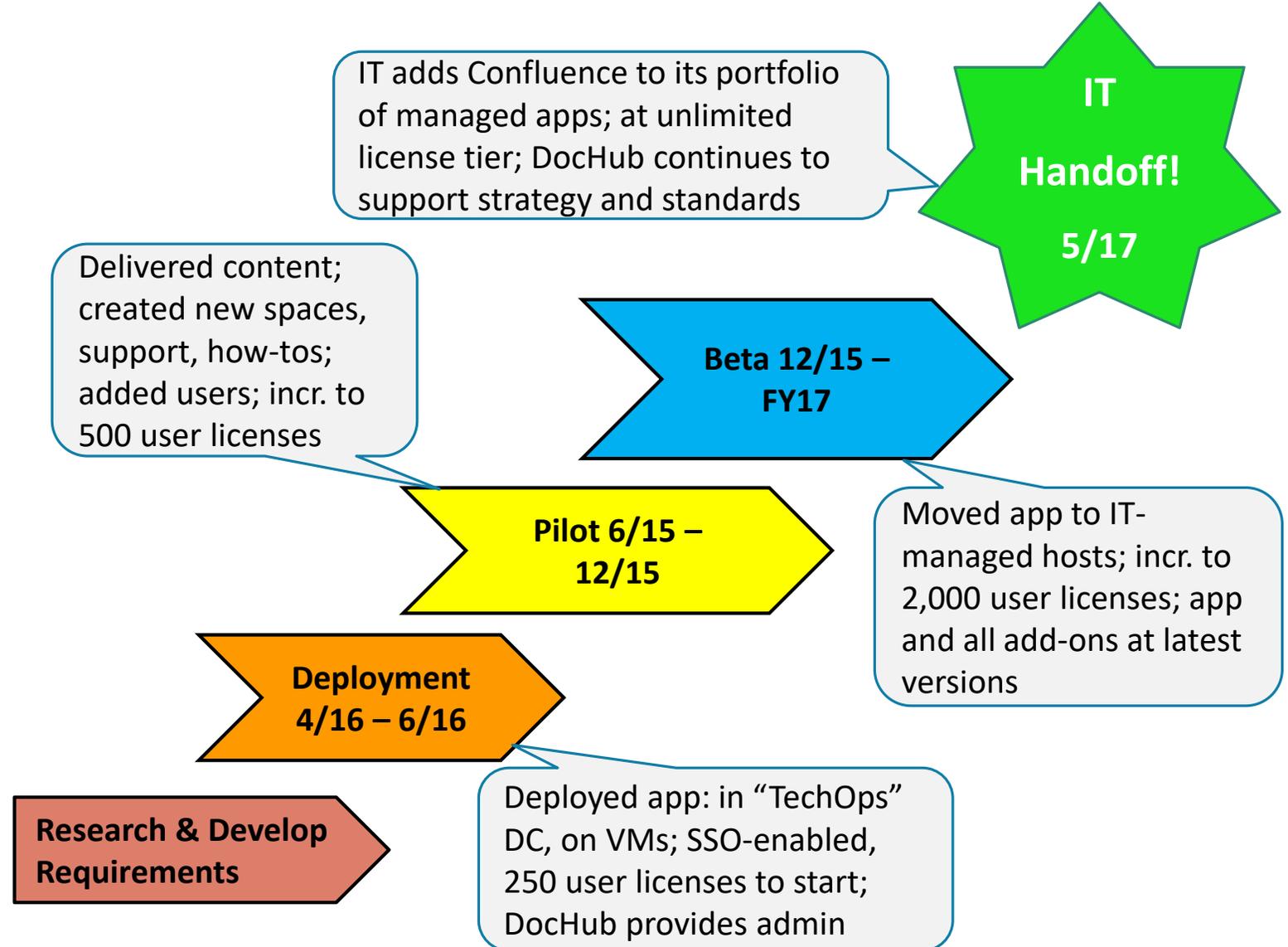
Salesforce Internal

## DocHub Scrum Team

- Product Owner
- Scrum Master
- System Administrator
- 3-5 Team Members



# From beta to IT handoff



## The Handoff



# Tips and Takeaways

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# The Pilot Admin



## Key elements

### User support

- Mission statement
- FAQs
- Online discussion group
- Quick Start guides
- Admin and user documentation
- Brown bags and presos
- Examples, examples
- Tool comparisons (pro/con)
- Solutions testing
- Bespoke care

### Project support

- Executives (decision-makers)
- Champions (influencers)
- Scrum team (daily admin)
- Int. Doc team members (expert users)
- IT team
- Technical (vendor)

# The Takeaways



## Lessons learned

### Know your audience. Users first!

Create **use cases**; needs matrix. Stay in touch and on top of evolving needs.

### Understand business needs

Get **executive backing**. Know your champions and advocates. Maintain executive and enterprise support.

### Create a compelling vision

Create clear value prop and **roadmap**. Clarify your goals and non-goals.

### Be Agile

Practice regular sprint planning. Collaborate and offer ample training resources for users and team members.

### Get a baseline

Lay the data groundwork for your **tracking metrics**. Maintain project visibility: **report regularly** on progress.

### Scale carefully

Missteps and bad press can derail pilots.

### Ask for feedback - regularly

Whoever says no can help you get to yes faster; listen, focus, but don't get distracted from your core goals.

### Help early adopters shine

Their work can **inspire** and help others.

### Build a parade. Be first to market

Educate, **evangelize**, and advocate at every opportunity. Ask for help; support others' growth; provide bespoke care.

### Document *everything*

Others need to know, and you'll forget.

### Capture the gushing

**Capture quotes** – anecdotal praise is gold.

## A Reminder



## Lead from any position

Technical writers are ideally situated to lead internal initiatives.

We are the eyes, ears, and scribes of our organizations.

We act as both external and internal user advocates.

Making our *users'* lives easier can make *our* lives better, too.

# Questions?



**Just ask!**

- *What was my favorite moment?*
- *What was my worst fear?*
- *What did I enjoy the most?*