EFFECTIVE ACTION GUIDE
for Technical Writers

AGENTS of CHANGE

BUILDING CONSENSUS

Updated 10/22/11

A Word of Introduction

MedAdvance is singularly fortunate to have such a wealth of outstanding talent in our technical publications department. Each of you brings your own, unique strengths to the table, to the benefit of us all. But now, as our team continues to grow – and the scope of our work here continues to widen – it's critical that we're all on the same page.

In an effort to achieve departmental consistency, I am forwarding you this brief guide, which will serve as a shared framework of action for our writing tasks.

My broader aim is to **empower each of you as an agent of positive change in our workplace.** The production process I've outlined will clarify your position as a *lead collaborator*. Through your efforts, you can achieve greater alignment among MedAdvance's diverse departments and produce more universally appropriate and effective texts.

As you read through this guide, consider the power you hold in your hands – the ability to build bridges of understanding within the company and to convey MedAdvance's purpose, nature, and character to the wider world. In effect, **change begins with you.**

Once you've absorbed, discussed, and begun to implement these new guidelines, I look forward to seeing each of you in action. Full speed ahead!

Your comrade in arms,

Becky Tumidolsky
Manager, Technical Publications

► LEAD COLLABORATOR | Your Authority, Your Responsibility

As sole author of the Product Development Summary (PDS), you are a *lead collaborator*, actively shaping MedAdvance's culture through your deliberations with all types of personnel.

To wield this power effectively, you must fully understand the context for your work. There are two critical questions you should consider at the start of each project.

1) What is the **"organizational situation"** at hand – the specific needs and expectations of all stakeholders, or interested parties, inside and outside MedAdvance?
2) What is the **larger backdrop** (i.e., current industry and economic conditions) and its relevance to this particular project?

Since internal and external conditions are constantly in flux, upfront research and planning are critical. Abandon your cubicle, assemble your team, take charge, and get the answers you need.

EFFECTIVE RESEARCH STRATEGIES

- **Solicit firsthand information from the broadest possible array of relevant personnel (face-to-face encounters are most productive).**
- **Clearly communicate your purpose and goals for the interview(s).**
- **Ask pointed questions.**
- **Request elaboration.**
- **Clarify responses when necessary (in person, by phone, or by email).**
- **Pinpoint areas of disagreement between/among contributors and offer suggestions for compromise.**

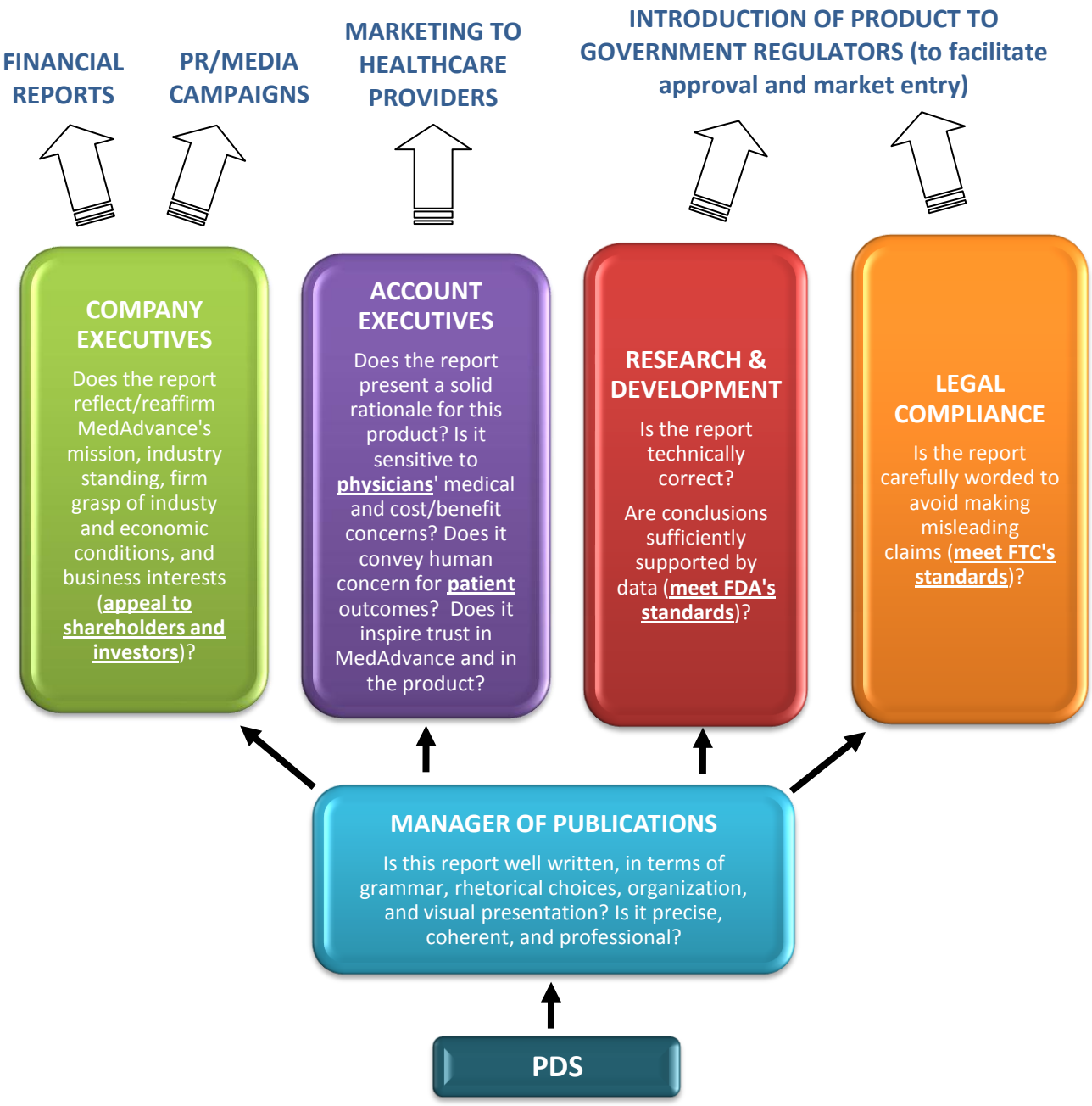
In this manner, you will produce sound, effective documents reflecting a fully collaborative process. And, more broadly, you will **fine-tune MedAdvance's internal operations** and **reinforce its reputation as a world-class organization**.

► PRODUCT DEVELOPMENT SUMMARIES | Diverse Audiences and Uses

Each PDS audience has a distinct perspective, agenda, and set of standards for evaluating our work. As such, it may often feel as though these departments are completely independent silos working at cross purposes. But you can tear down the walls, by actively seeking and building on common ground.

As a *lead collaborator*, this is your exclusive domain within MedAdvance. No one else has your authority and capacity to negotiate among competing interests and to forge compromise.

Study the chart on the following page. It will give you a better feel for the diverse stakeholders in this process, the criteria they will use to evaluate our drafts, and the various external applications for our work.



The PDS endures multiple layers of scrutiny, serves many distinct purposes, and spawns new communications for broader consumption.
Leverage your skills as a writer, team leader, and negotiator to advocate for all aims and audiences.

STAGE 1: PRE-PRODUCTION

Checklist for Collaborative Document Planning

To strike the right balance and shorten the PDS approval process, you must first speak with the appropriate project leader within each department. Initiate a pre-production group meeting to establish the parameters of your assignment.

In this meeting and in subsequent encounters, use effective research strategies (as described on page 3) to negotiate the following:

SUMMARY'S PURPOSE	Strategic direction and intended effect(s)
EXTERNAL CONDITIONS	Industry/economic backdrop for product's inception and development
NATURE OF THE PRODUCT	Construction, medical indications, and potential effects
CALIBER OF THE PRODUCT	Evidence of thoughtful design, soundness, and efficacy
COMPETITIVE OUTLOOK	Innovativeness, market advantages, and any constraints that may complicate market entry/success
STYLISTIC CONCERNS	Particular verbiage that should/must be included or avoided

STAGE 2: DOCUMENT REVIEW

The document review process should be fluid and highly interactive. Communicate with all project leaders – personally and as frequently as necessary – to solicit and clarify feedback. As *lead collaborator*, you are the information hub, uniquely poised to address conflicting concerns and find common ground among all relevant personnel.

STAGE 3: DOCUMENT REVISION

Checklist for Implementing Feedback

At each stage of review, as you prepare to submit a revised draft to all project leaders, carefully consider the following questions as they relate to the product summary's language, tone, organization, factual support, and overall presentation. (Senior staff writers are an invaluable resource in this regard. Do take advantage of their expertise.)

Does the draft demonstrate **MedAdvance's commitment to its ongoing mission?**	*To advance the healthcare industry by empowering physicians with state-of-the-art medical tools and improving the quality and effectiveness of patient care*	Does it manifest **our department's motto** (i.e., the collaborative process that shaped the document)?	Does it reflect current/projected **industry and economic conditions?**
Does it meet government regulators' requirements for **transparency, accuracy, and meaningfully supported conclusions?**	Does it reaffirm (to shareholders, potential investors, and competitors) our company's **strength, caliber, and industry leadership?**	Does it address medical practitioners' **cost/benefit and product efficacy concerns?**	Does it convey **human concern for patient outcomes?**

► **Throughout the review process, it is important to bear in mind that <u>conflicts will arise</u>.** Some stakeholders may take issue with others' demands for the document. Remember: You are the *lead collaborator*, uniquely qualified and ideally positioned to mediate disputes, bring divergent parties together, and resolve dilemmas. Defend your creative choices with confidence!

► **If you have an <u>ethical concern</u>,** speak up. We hired you for your passion, not your passivity. Do your best to ascertain the basis of any directive you find questionable. And don't try to wrangle with these issues alone. I encourage you to confer with me and other writing team members to determine the most prudent course of action.

The purpose of this guide is to provide a clear, concise framework for the PDS writing process. I hope this proves useful to you in all your future endeavors. If you encounter any difficulties or constraints in executing these guidelines, please bring them to my attention so we can work together to fine-tune our writing process and, if necessary, pursue structural changes within the company that will allow us to accomplish our goals.