

Creating new user experiences?

Via user interfaces, user journeys and narrative



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Summer 2017

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The art of process narrative

Carmel Murphy considers the role of narrative in effective process documentation.

As technical communicators, we know that elements of narrative and storytelling play an important role in our work. When we write content, we hope to create a clear, coherent narrative that follows an ordered structure to share knowledge with our audience.

Regardless of the subject of our content, or how it will be presented or distributed, our aim is to tell a story that has value for our audience, and makes them more informed. This isn't necessarily something we think about *consciously* as we develop content, but it is a central tenet underpinning our practice.

I was reminded of this recently when a process owner on my current process documentation project remarked that I had done a nice job of putting her process 'altogether in a story'. It struck me that this was a particularly apt way of describing process content development.

In fact, there are several ways in which process functions as a story. A well-crafted process narrative can be very beneficial for its audience, and can support wider process knowledge and improvement initiatives.

Process as story

Factual processes share many elements with fictional stories. At the most basic level, like a story, a process is a self-contained narrative that conveys meaning in its own right. It may be enriched by a reading of other process narratives to which it is closely related, but every process must be capable of being read as a standalone text.

For technical communicators, this is where our narrative skill and, in particular, our knowledge of topic-based authoring come to the fore. They enable us to write process narratives as presentational or Every Page is Page One

(EPP0) topics with a clearly established context and purpose.

Audiences consume these narratives as distinct units to help them carry out processes successfully and develop their process knowledge. While they may opt to read a combination of processes to gain a more in-depth understanding of a subject or area, each individual process can be read in isolation without the need to refer to additional sources.

Establishing this singular context for a process narrative is achieved in part through a reliance on story elements such as the following:

- Setting.
- Plot.
- Character.
- Illustration.

In turn, these creative elements make process documentation more appealing and easy to read. They also help to clarify information for the different audiences who may need to read a process narrative. These audiences may require different levels of understanding of the activities described, depending on their organisational role and level of experience.

Presenting a process as a story enables audiences to visualise how it works in practice. This is similar to the way user stories help agile development teams understand customer requirements and experiences.

Setting

The setting forms a vital part of the context for any story. Every process narrative should have a clear setting, that is, the time and place in which the process happens.

This might seem like basic information about a process. However, in organisations where little supporting documentation is available, establishing the process time frame, the location, and the typical duration of each step involved is not always straightforward.

Once this is documented, the process narrative serves as a clear and shared authority for all parties involved in its implementation.

This is particularly important in large or multinational organisations where a process can unfold across multiple sites over a period of several months or even years. For example, this could be the development of a drug product formulation, the performance of product testing, or the movement of particular goods within a supply chain.

A process is a self-contained narrative that conveys meaning in its own right.

*In fair Verona,
where we lay our scene*

Figure 1. Setting

Plot

The process 'plot' is the series or flow of events in a process. Process narratives need a clear start and end point, and the activities involved in the process must be ordered appropriately to ensure a successful outcome or process output (the denouement).

In a standard narrative, events typically play out in sequence, and many process narratives also work like this. However, you must always allow for the possibility that certain parts of a process may occur in parallel, and indicate this clearly, perhaps with the aid of illustrations.

Similarly, the flow of events in a process may vary depending on the outcome of particular actions or process steps. Again, it is vital to show this clearly.

When documenting a process, one of the most challenging aspects can be taking a raw description, or sparse or opposing background materials, and arranging this information into a recognisable order of events.

In some cases, existing process knowledge can be limited to a certain group or even one individual in an organisation. In others, conflicting source materials on the process may be in use, or the parties involved in carrying out the process may not share a common understanding or interpretation of what the process actually entails.

Similarly, over-familiarity with the performance of a process can sometimes cause minor steps to be overlooked, affecting the final result or process outcome. Here, our information-gathering skills as technical communicators can support effective process discovery and the consolidation of available knowledge in the process narrative as a central reference point.

This collaboration with process owners and others involved in the process can also supply plentiful opportunities for process improvement and time-saving through the following:

- Introduction of more effective information management practices.
- Questioning of the order or sequence of process steps.
- Elimination of unnecessary process activities.
- Creation of leaner, more refined processes.

It's not always an easy task, but helping to plot a clear process flow that becomes widely accessible to those that need it within an organisation is often one of the most satisfying aspects of finalising a process narrative.

Character

Every process has its own distinct cast of characters: the party or parties that are responsible for carrying out the process

A pair of star-cross'd lovers take their life

Figure 2. Plot

activities and accountable for its successful completion. Writing an effective process narrative means knowing exactly who these characters are and how they function in the process plot.

A good process narrative reveals the actions that must be completed by each party involved, when they need to complete them, and what exactly these actions entail. Essentially, it speaks to the various audiences who need to understand a process to ensure its continuity, regardless of whether their part in the process is a major or minor one.

In practice, this means that the process is more likely to flow smoothly and on time. In turn, this helps to do the following:

- Avoid conflict and reduce human error.
- Improve overall quality and operational efficiency.
- Reduce waste or muda (see panel).

Again, this identification of responsible and accountable characters is particularly important in larger organisations where processes are often performed collaboratively across functions, departments, and even time zones.

Illustration

Since the medieval period, illustrations have been used in published texts to illuminate and enrich the narrative experience, and they can often shape the reading or interpretation of a story.

Technical communicators can support effective process discovery and the consolidation of knowledge in the process narrative.

*For never was a story of more woe
Than this of Juliet and her Romeo*

Figure 3. Character

Muda or the seven wastes of Lean manufacturing

'Muda' is a Japanese word that means futility, uselessness, or wastefulness. It is one of three key concepts identified in the Toyota Production System (TPS) as having a negative impact on successful manufacturing: waste (muda), unevenness (mura), and overburden (muri).

Muda refers to any activity or process that does not add value or consumes more resources than needed. Muda is a particularly important idea within Lean manufacturing, where it is broken down into seven subcategories or individual wastes to be eliminated, as identified in the TPS:

- Transport.
- Inventory.
- Motion.
- Waiting.
- Over-processing.
- Overproduction.
- Defects.

Muda can be reduced by ensuring that process inputs and outputs are not overproduced or generated too early or too late, and that those involved in downstream process steps are not delayed or halted while waiting for the completion of earlier process steps.

Process narratives help multiple audiences to perform their work more effectively.

Equally, within a process narrative, the inclusion of a clear process map or other diagrams enhances meaning and strengthens process knowledge by doing the following:

- Clarifying the flow of events in the process (the workflow or process plot) and the timeline.
- Identifying the various characters or parties involved in performing the process.
- Illustrating complex activities involved in the process.
- Showing the relationship of the process to other processes.
- Locating the process within a broader process hierarchy.

Process maps offer a vital visual supplement to the process narrative, appealing to audiences who seek a graphical representation of the roles and activities involved in the process, or its relationship to other organisational activities within a value stream or value chain.

The key to process knowledge: everyone appreciates a good story

The process narratives that underpin an organisation involve numerous subjects and can employ various settings, plots, characters, and illustrations.

Ultimately, however, all process narratives share a common theme or purpose, which is to foster process knowledge and improve the workings of the organisation as a whole. Good process narratives do the following:

- Document organisational activities clearly and consistently.
- Clarify process roles and responsibilities across departments and organisational sites.
- Support the development of a repository of process knowledge.
- Enhance training for new and existing employees and aid effective organisational learning.
- Standardise ways of working and improve general operations, workplace efficiency, and production yields.
- Aid Lean and Six Sigma process improvement drives.
- Fulfil regulatory requirements for documentation and support certification efforts.
- Speak to multiple audiences with varying levels of process knowledge and experience.
- Reflect the wider organisational ethos and build trust by using appropriate voice and tone.

For societies and communities, stories bring knowledge and order and a shared way of understanding the world. It is no surprise then that the use of story elements can help us to understand our workplace and the role that we play there to a greater degree.

*Romeo, there dead, was husband to that Juliet;
And she, there dead, that Romeo's faithful wife*

Figure 4. Illustration

Process narratives help multiple audiences to perform their work more effectively and easily. Even more significantly, process narratives reveal how the actions of these audiences fit within the bigger organisational picture.

Processes must be understood and documented as discrete entities, but every workplace process exists within a much wider network of processes and activities. This is where the expertise of technical communicators in topic-based authoring comes once more to the fore, enabling us to establish the connections and relationships between the distinct process narratives or topics that make up the wider organisational story. **C**



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