UNIT 4: DESIGNING A COMPREHENSIVE INFORMATION PLAN

OVERVIEW

In this unit, you will learn more specific strategies for planning writing projects and for diagnosing problems that result from poor or no planning. One goal of the unit is to help you understand the advantages of planning through a written information plan. You will learn to share your planning expertise as it develops by critically evaluating the information plans of others.

Another goal of this unit is to explain how information planning can assuage some of the anxieties involved in delegated writing assignments. Good information planning reveals the care and attention that management brings to each writing situation and builds employee confidence. In addition, you will learn how effective planning establishes a process for monitoring and tracking the progress of delegated writing.

OBJECTIVES

After completing this unit, you should be able to:

• list the major advantages derived from information planning

• propose planning-related remedies for problems encountered in sample writing projects

• write an information plan that includes a statement of purpose, objectives, audience assessment, information specifications, schedule, methodology, and distribution strategy

• analyze and improve peer information plans through critical evaluation

• describe criteria for delegating writing authority and tracking writer progress based on comprehensive planning

DISCUSSION

HOW IS INFORMATION PLANNING RELATED TO MANAGING?

Information planning encourages writers to adopt project management strategies as a way of managing single writing assignments in addition to varied, complex, or diverse writing tasks. **Information planning** is an exercise in thinking through the purposes, goals, objectives, schedules, and production mechanisms associated with writing.

Traditionally, writers plan their writing through a variety of activities such as outlining, taking notes and keeping notebooks or journals, and using cassettes to record ideas. Although these strategies can still be highly effective for individual writers, more formal processes are required for teams of writers or for managers trying to manage multiple writing projects at once. Information planning assists writers and managers in treating each writing project as unique, while allowing them to manage several projects simultaneously. Information planning encourages a thorough approach to writing by eliciting the writer's response to predefined (often self-defined) goals and milestones, and can assist less confident writers by providing a structured work environment, spelling out for them ahead of time some important aspects of their work. In general, managers view information planning positively because it helps them establish and enforce coherent writing policies and procedures, assists in tracking and evaluating employees' writing performance, and helps to ensure the timely completion of writing projects.

What Types of Writing Qualify for Information Planning?

Not all types of writing qualify for information planning, although most writers can benefit from some planning activities. Small, everyday writing tasks, such as posting notes through E-mail, writing informal memos, compiling informal status reports, and similar activities are probably not candidates for information planning because they can generally be accomplished in less time than it would take to construct a plan. Types of writing that do benefit from information planning include:

- Any series of documents, collection of books, libraries, and the like that must be developed over time, can be developed by writing teams, or have attendant production or distribution issues.

- Any type of manual, including personnel manuals, policy and procedure manuals, computer documentation, sales manuals, and others.

- Large or complex reports, especially those that may be written by more than one writer. These can include engineering or programming specifications, regulations, proposals, contracts, employee evaluation portfolios, and others.

- Some presentation materials, such as brochures, product information packages, and foil sets.

- Most online information, including computer Help systems, online books, hypertext information, and other forms of information that will be accessed and stored in databases.

- Writing projects that are difficult to implement because of innate problems; for example, projects owned by two or more groups or projects in which writers are located far from one another or from sources of information.

As a manager, you might devise a long-range information plan to address the long-term information needs of the people you manage, or you might focus on a single project. For example, you might assess and plan for a series of documents to convey a change in organizational structure or policy to your employees. Such a plan would function as a tool for educating your employees. In addition, the plan would help you to organize and arrange the information into manageable chunks that your employees could digest. Because doing an information plan will force you to state the purpose of the writing, list the objectives you wish to achieve, assess the audience, determine what form the writing will take, identify sources of information, and plan for delegating writing and producing what is written, you will probably find that the actual writing proceeds like clockwork, and is, in fact, less complex than the planning process.

What Types of Information Plans Work Well for Managers?

Both managers and employees can construct information plans, but some planning activities may be more appropriate for managers who want to manage department-wide writing projects. A major advantage of having an information plan for projects that you choose to manage is that the plan can help you to delegate various management activities and still maintain project-level control.

To understand how this works, let's examine the information plan that Maria Suarez constructed for a writing project within her department. Notice that in the outline of her plan, responsibility for writing certain sections has been delegated to specific employees.

Figure 4.1
Sample Information Plan I

Maria's Departmental Writing Project for Constructing a Policies and Procedures Manual

Phase 1: Information Plan

I. **Purpose for Writing**—to document current practices and procedures that are commonly used by all employees in department 9k.

II. **Audience—**current and prospective employees of department 9k; professional and administrative staff.

III. **Goals of Information**—Information contained in the policies and procedures manual will be constructed to serve as a reference for current department members who need information about the policies and procedures of the department. An additional goal is to teach new department members about policies and procedures.

IV. **Information Objectives**—Information contained in the policies and procedures manual will have the following objectives:
   • Provide quick and easy access to information in both hardcopy and online forms.
   • Educate employees in each of these policy areas: time and attendance, dress and demeanor, safety and emergency provisions, business ethics and conduct, employee evaluation, salary and payroll.
   • Specify procedures for performing these routine duties: filling in time cards, reporting absences, conducting fire safety drills, handling medical emergencies, receiving and entertaining visitors, engaging in outside work, submitting a self-evaluation, scheduling a performance review, requesting a salary review, reporting errors to payroll, terminating employment.

V. **Information Specifications** —[delegated to Brenda Jackson, production specialist]
   • Overall structure—describe scope, size, and layout of the manual.
   • Title—include full, copyrightable title. Identify trademarks or registered trademarks.

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Figure 4.1—*continued*

   • Security level—specify level and describe enforcement for both hardcopy and online versions of manual.
   • Printing specifications—describe paper weight, print style, fonts including dpi quality and leading.

- Artwork production—describe types of art and production mechanism for each type.
- Packaging—describe binding for manual, including stitching requirements.
- Production—describe production mechanism and schedule.
- Copyright specifications—describe copyright timetable, mechanism, and responsibility.
- Distribution—describe how manual will be distributed to members of department and how it will be placed online. Mention persons responsible and timetable.
- Stock and archival—describe how copies will be stocked and archived. Describe how updates will be handled and existing copies disposed of. Also describe procedures for managing dual maintenance of hardcopy and online versions.

VI.   **Sectional Content Outline—Part 1: Time and Attendance** [Delegated to Frank Paris, Personnel]

VII.   **Sectional Content Outline—Part 2: Dress and Demeanor** [Delegated to Vernia Duncan-Smith]

VIII.   **Sectional Content Outline—Part 3: Safety and Emergency Provisions** [Delegated to Ravi Gupta, Facilities Security]

IX.   **Sectional Content Outline—Part 4: Receiving and Entertaining Visitors** [Delegated to Janice Ohman]

X.   **Sectional Content Outline—Part 5: Engaging in Outside Work** [Delegated to Lee Chang, Legal]

XI.   **Sectional Content Outline—Part 6: Scheduling Evaluations and Salary Reviews**

XII.   **Sectional Content Outline—Part 7: Reporting Errors to Payroll** [Delegated to David Stewart, Payroll]

XIII.   **Sectional Content Outline—Part 8: Terminating Employment**

XIV.   **Methodology—**Determine methods for coordinating writer input to document, arrange for editing and establish editorial standards, establish style guidelines. [Delegated to Lorna Steinberg, editor]

XV.   **Information Verification—**Check with legal and other departments contributing to this manual. Verify all procedures for accuracy by testing them. Describe a plan to continued verification of information to be added to this manual. [Delegated to John Sonoro, administrative assistant]

XVI.   **Schedule of Milestones**

XVII.   **Assumptions and Dependencies**

Notice that Maria's sample information plan is identified in its subtitle as Phase 1 of the overall writing project. Even before the plan is written, Maria has adopted a longer view of its usefulness as a planning tool that is designed to be replaced by the actual writing product, the manual, in Phase 2 of the project. Although not yet visible, the sample suggests that Phases 3 and 4 might include the production and distribution phases, with perhaps a final Phase 5 designed to provide Maria and her writers with feedback about how the manual is received and used by its audience.

Although there is no established content or form for an information plan, Maria's approach in her plan outline is to identify areas that will be essential to delivering her finished product. She attempts to be comprehensive in scope while, at the same time, she encourages thoroughness within each of the sections to be written as part of the plan. The sectional outlines

that Maria chooses to include in the plan become the basis for the policies and procedures manual itself. By delegating the writing of many of these sections and including them in her plan, Maria builds into the writing process a preliminary checkpoint for writers. By involving her writers early in the planning stage of the project, Maria also allows herself the leeway to reassign some sections if the writers do not prove able to write them.

What Types of Information Plans Will Work for Employees?

Under the plan described in the previous section, a manager elected to plan and monitor a departmental writing project herself, by creating an information plan and assigning others to contribute to it. In reality, Maria's plan might also have been managed by one of her employees who functioned as project coordinator or team leader for a writing team. What designates Maria's project as one appropriate for management involvement is the departmental scope of the project and the fact that some sections contain information appropriate to managers. Writing projects require management encouragement and supervision, for typically, individual employees do not view themselves as being directly responsible for completing them. Sometimes, the day-to-day job that an employee actually performs may impede progress on writing projects if the employee does not have time to accomplish both.

Managers who want to train employees to construct information plans would do well to create opportunities for the construction of such plans as part of the daily jobs of the employees. Figure 4.2 below, an outline for an information plan to cover a series of engineering documents, illustrates one way in which to involve employees directly in planning, implementing, and tracking writing projects.

Figure 4.2
Sample Information Plan II

Dale, Pat, and Lee's Information Plan for Providing Project-Related Engineering Documents
Phase 1: Information Plan   (Responsibility, Pat as lead, with cooperation from other team members.)
I.   **Purpose for Writing**—to provide three different types of documents for three different audiences to accompany solar research project.
II.   **Audience**—Document 1, Functional Specification—engineers. Document 2, Management Report in the form of an executive summary—immediate and divisional managers. Document 3, journal article—general science audience.
III.   **Goals of Information**—Information for this writing project will provide the basis for building the solar ray projector, for summarizing the results of the project to management, and for disseminating information about the project within the community at large.

IV.   **Information Objectives**—Information contained in each of the three documents will have these objectives:
- **Management Report and Journal Article**—Provide accurate and easy access to information about how the project was conceived, researched, built and evaluated.
- **Engineering Functional Specification—**Specify procedures for performing the research associated with the project, including constructing the ray projector itself.
- **Management Report**—Educate management about the salient points of the project; identify unique achievements and document costs.
- **Journal Article**—Educate the scientific community about findings associated with the project.

V.   **Methodology**—Writing tasks in this project will be shared among writing team members. Members of the team will write the Functional Specification first, as that will provide the foundation for developing the product. Changes to the design documented in the functional spec must be written and incorporated into the spec as the project evolves. Once the project is complete, the executive summary will notify management of the completion. The summary will address budget and resource use, findings, recommendations, limitations, and patent implications, and will be written by the project's lead engineer. The final document, the journal article, will be written jointly by team members within a year of the summary. The journal article, like the other two writing components, will be subject to corporate guidelines for external publications, and will undergo rigorous review.

continued

Figure 4.2—*continued*

VI.   **Information Specifications—**
- **Overall structure**—describe scope, size and layout of each document.
- **Title**—include full, copyrightable title. Identify trademarks or registered trademarks.
- **Security level**—specify level and describe enforcement for both hardcopy and online versions of manual.
- **Printing specifications**—describe paper weight, print style, fonts including dpi quality and leading. [Must work with journal editors for third document.]
- **Artwork production**—describe types of art and production mechanism for each type.
- **Production**—describe preliminary and final production mechanisms and schedule. List supporting resources.
- **Copyright specifications**—describe copyright timetable, mechanism, and responsibility for journal article.
- **Distribution of Functional Spec**—describe how the spec will be distributed to members of department and how it will be maintained and updated. Mention persons responsible and timetable.
- **Distribution of Management Report**—describe how copies will be distributed and how updates will be handled.
- **Distribution of Journal Article**—describe how article will be distributed internally for review and how updates will be made. Assign responsibility for submitting final draft to journal publisher.

VIII.   **Content Outline—Functional Specification** [Responsibility of all team members]

IX.   **Content Outline—Management Report** [Assigned to Pat Chakra]

X.   **Content Outline—Journal Article** [Responsibility of all team members]

XI.   **Information Verification—**Organize peer reviews. Check with legal and other departments. Verify all research procedures for accuracy by referring to logs. Check conclusions derived within journal article. Ensure editing of journal article and summary.

XII.   **Schedule of Milestones** [Assigned to Pat to develop]

As in the manager's information plan, the employees who constructed this plan were involved in thinking through the project and in accepting personal responsibility for seeing various phases of the project to conclusion. Although the engineers' actual labor on the writing aspect of the research project will constitute only a part of the total effort to develop the solar ray, the early involvement of writers during the planning stages of the project as well as the inclusion of writing activities early in the project's life, will emphasize the view that the writing is an integral part of the total work effort. (This is particularly important in scientific and industrial environments where patents for processes and inventions must be sought and issued early to protect ownership of ideas.)

EVALUATING INFORMATION PLANS

One characteristic of information planning that makes it a valuable asset for managers is that it encourages total team participation in the planning process. Because information plans attempt an overview of writing projects before they begin, they involve employees in sharing and disseminating information early, and in solving problems before they threaten the viability of a project. In the two plans outlined in this unit, you saw, for example, how creating content outlines and thinking through the methodology for writing creates greater certainty about the scope of a project and about who is responsible for which pieces. Plans that are flawed threaten to jeopardize quality, or involve high risk, particularly in scheduling and staffing, and can be detected before their projects get underway. Moreover, as employees are asked to evaluate the information plans of others, valuable advertising of writing occurs, as people learn about what is being written and by whom it is being written—an especially effective way for priming the flow of information within large organizations.

Often writers work in teams to assess one another's writing, but many novice writers and planners mistakenly believe that planning is a solitary activity. As a manager, you know the benefits to be derived from teamwork and sharing knowledge. So too, collaborative information planning can assist writers by calling into play others' knowledge of audience and the tasks audiences will perform. In addition, shared planning can provide specific knowledge of or strategic insights into the workings of an organization which you had not thought of before. This is true for management as well as employee planning. If your plan for disseminating information to employees about a structural or policy change has flaws, for example, a peer review of the plan by other managers before you begin to implement it may detect those flaws and allow you to correct them.

Although it might not appear to do so initially, effective information planning can also help you to delegate writing authority effectively, and thus become a better manager. Unfortunately, many employees view delegated work—especially delegated writing—as work that is either too difficult or too tedious to be worthy of management consideration. The famous mandate, "prepare a report for my signature" can be variously interpreted by employees to mean, "I'm too lazy to do this myself," "I am not capable of doing this myself," or even, "I can't write, so you must do this for me." Delegated writing can become an issue in management/employee relations when employees fail to see value in the work; when they lack the time, skills, information or confidence to complete it; or when they see little opportunity for reward.

Given that information plans are designed to be shared documents, it is inevitable that they will also be formally or informally evaluated. Writers evaluating the plans of others, including those of their managers, need guidelines for evaluating constructively. Some guidelines for evaluating information plans are provided below. As with any peer review in formal settings, scheduling formal meetings to establish consensus and to collect feedback is recommended.

Guidelines for Evaluating Information Plans

- Is the plan comprehensive and does it portray the full scope of writing and research needed to do the writing?

- Is the purpose for writing clear?

- Are all pieces of writing clearly and distinctly identified, including bridge writing, such as composing memos to get access to libraries or to human repositories of information?

- Are the number and types of documents proposed sufficient?

- Is the audience for each piece of writing distinct?

- Is the responsibility for initiating and completing each writing assignment clear?

- Is overall responsibility for the writing project clear?

- Is the schedule for completing each piece of writing clearly delineated? Does it make sense and can you detect activities that are on the critical path? Will writers be able to produce the writing in the time allotted?

- Do some milestones on the schedule conflict? Where might writers depend on other activities or information from others to complete a writing task?

- Is it clear how the writing will be packaged and distributed when completed? Can you visualize the finished product?

- If you deem this a high-risk project, what assumptions and dependencies does the plan need to address?

MANAGING MULTIPLE INFORMATION PLANS

Managers who implement full-scale information planning perceive its value in providing them with oversight of many projects at once. As employees become more accustomed to planning what they write, management involvement in writing projects can diminish without diminishing the level of knowledge that a manager needs to have about the writing projects of his or her department. This trend away from micromanagement will result in more time to be spent tackling management issues on other fronts. For example, if you don't have to worry about when a report will be written and how it will look, you may be able to spend more time focusing on the issues that appear in the report.

Some managers may ask, "How do I know when my department will be ready to assume more planning responsibilities?" and "How can I be sure that the work will be done?" Establishing criteria for delegating information planning responsibilities will help you assess the readiness of each employee objectively. Not all employees who are expected to write in their jobs can be expected to be good planners of writing projects. Most employees will need to develop planning skills, at least initially, and managers can help. For example, before requiring an employee to produce a first information plan, a manager might require that a writer serve first as a reviewer of someone else's plan. If new employees or junior writers are allowed to serve with experienced writers and planners on review teams before they write plans themselves, they will learn what does and doesn't work. In addition, making departmental information plans available through some central filing system will encourage employees to read and use them for reference. Although there is some danger that poorly written plans may be copied under these conditions, when reviews are scheduled and held, other employees will be able to provide feedback.

Managers can and should reward achievement in writing just as in other aspects of an employee's accomplishments. Managers who want to encourage information planning might also institute incentives, such as offering rewards or recognition for well-written plans or for the completion of writing projects that track according to plan.

REFERENCES

(None)

REVIEW QUESTIONS

1.   What is an information plan and who is the intended audience for it?

2.   List three major advantages of planning information through an information plan.

3.   What should you include in the information objectives section of an information plan?

4.   How will the information specifications section of an information plan save time at the end of a writing task?

5.   List three areas that you might discuss in the information specifications section of an information plan.

6.   In evaluating the information plan of another writer or employee, what major sections should you look for? What logical relationships might you expect among the different sections of the plan?

7.   Discuss two ways in which managers can share planning responsibilities for writing projects with employees.

8.   How can information planning have a positive effect on the way employees perceive delegated writing?

INTEGRATING QUESTIONS

1.   Some people argue that writing an information plan imposes even more bureaucratic red tape on businesses already overburdened with cumbersome bureaucracy. Others argue that it delays the completion of writing tasks because it forces the writer's attention away from the material to be written. How would you respond to such arguments?

2.   What types of employees will benefit from having to do information planning, and what types benefit from simply having access to information plans completed by others?

3.   What characteristics of good management are inherent in information planning?

4.   Books for managers, such as Mary Munter's *Guide to Managerial Communication* (see Suggested Reading), frequently discuss information planning in conjunction with brainstorming, freewriting, information gathering, and other activities that occur prior to writing. What is the relationship between writing an information plan and performing these activities? Does a writer necessarily do both?

SUGGESTED ACTIVITIES

•   Devise a schedule for a writing project that you can complete within six months. As the project progresses, track actual dates when milestones are achieved as well as the dates when you had projected that they would be achieved. Keep a diary to record problems encountered during the project.

•   Organize an internal review for a document written by you or members of your department. Draw up a checklist for reviewers, and set goals and objectives for the review period.

•   Write an information plan for your next writing project. Be sure to include audience analysis, a description of the project, expected outcome, and other important planning topics discussed in this unit.

SUGGESTED READING

Alred, Gerald J., Walter E. Oliu, and Charles T. Brusaw. "The Document Process." In *The Professional Writer: A Guide for Advanced Technical Writing*. New York: St. Martin's Press, 1992.

Grice, Roger. "Information Planning is Part of Product Development." In *Text, Context, and Hypertext*. Cambridge, Mass.: MIT Press, 1986.

Munter, Mary. *Guide to Managerial Communication*. Englewood Cliffs, N.J.: Prentice Hall, Inc., 1982.