

Document IT Communicate IT Succeed!



Deborah Gleason

About THE Information Tamer







- Data to English translation, Technical Writing, Presentations That Inform



What I Want to Share Today

- 📄 Documenting the stuffing out of what the business does will make a difference
- 📄 Customizing communication and presentations will result in more successful proposals and changes

Document Until It Hurts

-  Consistency
-  Training
-  Change Management
-  Clarity of Process
-  Audit Compliance
-  Backup/ Contingency Planning

Documentation Types

 Process Documentation

 Process Mapping

 User Manuals/ Instruction

Documentation- System/ Process

- 📖 Purpose – what it does and why
- 📖 Data Dictionaries – variable type, definition, length, source
- 📖 Specs – background, methodology, design process
- 📖 Place in Overall Business Process – what impacts and is impacted by the process
- 📖 Sources – files/ systems that feed the process
- 📖 Contingency Plan – steps if process fails/ does not run

Documentation - Sample Template

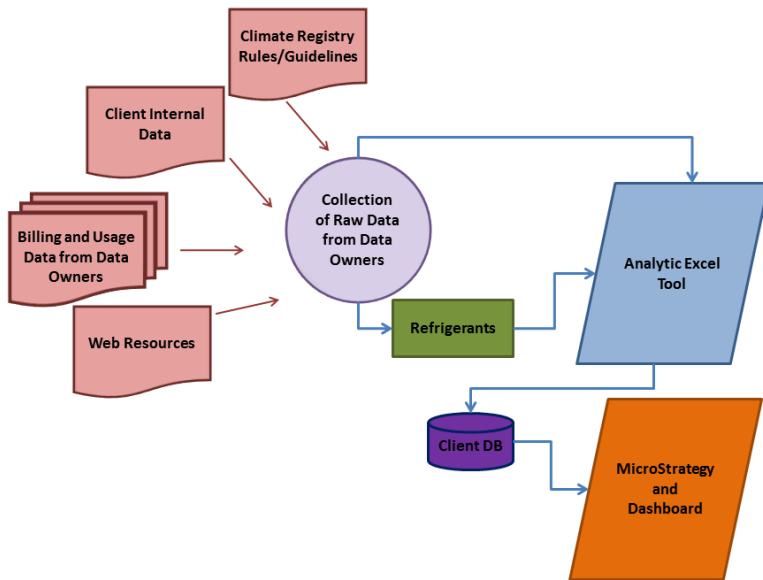
Documentation Template					
Sustainability Tool Environmental					
Purpose of Process					
<p>Example:</p> <p>The Sustainability Tool is designed to provide a central source to analyze and report the environmental impact of Company X from a usage standpoint. It is comprised of data templates, Excel tools, an Access database and MicroStrategy.</p>					
Data Dictionary					
Example:					
Variable	Format	Definition	Values	Special	Source for base data
Site	Text	Location identifier	Any alphanumeric	No leading zero	Fetch
Site Address	Text	Address of site	Logical - alphanumeric		Same as Site
Site Type	Text	Type assignment for the site	Closed Distribution Center, Distribution Center, Store, Closed Store, Placeholder, Catalog, Internet, Not Defined, HQ		Same as Site
City	Text	Site City	Logical - alphanumeric		Same as Site
State	Text	Site State	Text - XX		Same as Site
Postal Code	Text	Site Postal code	Text - 00000	Critical that this is 5 only	Same as Site
Climate Zone	Text	Site climate zone	Text		External source
EGrid	Text	An assignment of grouping on the power grid	Text - XXXX		External source
Electric	Num	Electric usage - kWh	Numeric - 0.0000		Data Warehouse
Natural Gas	Num	Natural gas usage - Therms	Numeric - 0.0000		Data Warehouse
Diesel	Num	Diesel usage - gallons	Numeric - 0.0000	DC and HQ Only	Data Warehouse
Propane	Num	Propane usage - gallons	Numeric - 0.0000	DC and HQ Only	Data Warehouse
Jet	Num	Jet fuel usage - gallons	Numeric - 0.0000	DC and HQ Only	Data Warehouse
Water	Num	Water consumption - kGallons	Numeric - 0.000		Data Warehouse
Specs					
<p>Example:</p> <p>Needed to fulfill requirements for carbon reporting. This was developed using Climate Registry rules and calculation factors. Data was collected from multiple sources and cleansed. For sites where data was unattainable, an average of like sites was applied.</p>					
Requisites					
<p>Pre Files from utilities, Site file update</p> <p>Post Feeds Report of Sustainability</p>					
Sources					
<p>Source files etc. Sites file, utilities usage files 1-6, Metrics Calc file</p>					
Back-up Plan					
<p>Example:</p> <p>Restore previous version in case of failure. If data is unavailable, notify data owners of non-receipt.</p>					

Process Mapping

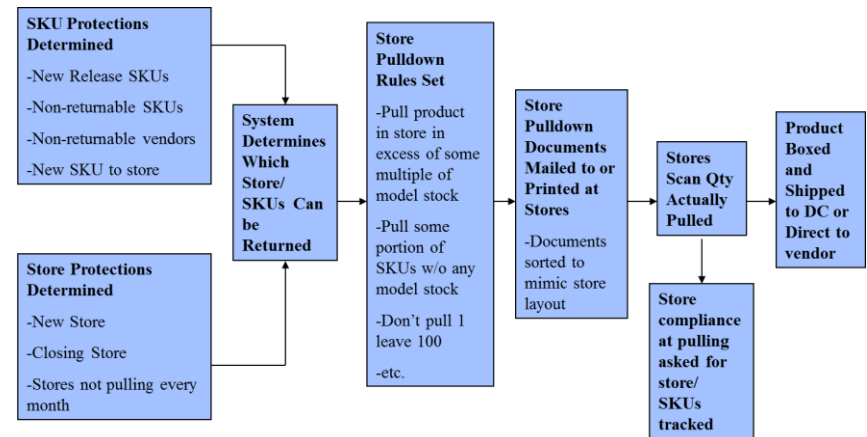
- 📄 Resource Map – where does input come from
- 📄 Flow – what happens to the input
- 📄 Dependents – what does the process feed

Process Mapping Samples

True Flow Charting



Simple Flow







User/ Training Manuals

- 📖 Purpose – why and what
- 📖 Steps – how to do what needs to be done
- 📖 Distribution – Method and Recipients
- 📖 Accuracy Check – how to know the data is up to date
- 📖 Contingency Plan – managing if process fails, what and to whom to report

User Manual - Sample Template

User Manual Template									
Sustainability Report									
Why this Process is Run									
<p>Example: The Sustainability Tool is designed to provide a central source to analyze and report the environmental impact of Company X from a usage standpoint. It is comprised of data templates, Excel tools, an Access database and MicroStrategy.</p>									
Distribution									
<p>Example:</p> <table border="1"> <thead> <tr> <th><i>Person</i></th> <th><i>Method</i></th> </tr> </thead> <tbody> <tr> <td><i>CEO</i></td> <td>Email</td> </tr> <tr> <td><i>Managers</i></td> <td>Paper Copy</td> </tr> <tr> <td><i>Buyer</i></td> <td>Online Report</td> </tr> </tbody> </table>		<i>Person</i>	<i>Method</i>	<i>CEO</i>	Email	<i>Managers</i>	Paper Copy	<i>Buyer</i>	Online Report
<i>Person</i>	<i>Method</i>								
<i>CEO</i>	Email								
<i>Managers</i>	Paper Copy								
<i>Buyer</i>	Online Report								
Steps									
<p>Example:</p> <ol style="list-style-type: none"> 1. Open the report window 2. Click on Run Sustainability Report 3. Export results to Excel 4. Verify Accuracy 5. Distribute Report 									
Accuracy Checking									
<p>Example: Compare current month results to last month's numbers. Verify check with information from report run to final excel sheets.</p>									
What needs to be ready before this can be run									
<p>Example: Check for update date on the system. Store file must be updated etc.</p>									
Back-up Plan									
<p>Example: If data appears not ready, contact IT. If report looks inaccurate, validate all steps, restore old version and re-un. Step through macros for error check. Verify all files have been updated.</p>									

General Tips


-  Standardize Templates
-  Create Best Practices
-  Think of these as a safety net
-  Modify to Create Templates for Report/ System Requests and Changes

Communicate IT

Customizing Messages/ Presentations

- 📄 Who are you talking to
- 📄 What do they need to be informed or make a decision
- 📄 What is their “jargon” tolerance
- 📄 How will they use what you tell them
- 📄 Are they visually or verbally engaged
- 📄 How much time do you have with them

Four Major Groups

-  Your Co-workers
-  Your Management team
-  Execs
-  The “users”

Chart

Who	Needs	Jargon Tolerance	Use of Info	Vis/ Verb	Time
Co-workers	Background Steps Impacts System Reqs Coding needs	High	How they will do what needs done. Task Planning	More verbal except flowchart	NA
Your Management	Man hours System Reqs Impacts Costs	Fairly high	Resource planning, Cost benefit analysis	Lean verbal with some visual	Availability
Execs	Cost ROI	Minimal	Decision Making Budgeting	Visual	1-2 minutes
Users	Impacts Delays Changes in process	Limited	Task planning	Middle	15-20 minutes

Customizing Sample

- 📄 Let's use Proposing a New Forecasting Methodology
- 📄 You need to convince 4 different groups that it is wicked awesome
 - Your Co-workers
 - Your Direct Management Team
 - The Execs
 - The Users

Your Co-workers

- 📖 What do they need to know
 - Your coding methodology in detail, so they can tear it apart
 - The detailed math and of proof of concept
 - The code changes they will need to make
 - The systems they will need to modify
 - The documentation needing updating
 - How much time it will take them to do
 - Who will do what

Your Managers

- 📖 What do they need to know
 - Your methodology and code validation
 - Proof of concept
 - Evidence of improvements in accuracy
 - System Impacts
 - Manpower requirements
 - Plan of action for implementation
 - Testing Plan
 - Training and rollout plan

The Execs

What do they need to know

- Benefits/ ROI
- Evidence of accuracy improvement in business terms (in-stock, sales)
- Cost – time, man-hours, transition, dollars
- Implementation timeline
- Testing Plan
- Impact to business – downtime, training

The Users

What do they need to know

- Benefits
- Evidence of accuracy improvement- keep it more direct (% increase in accuracy)
- Implementation timeline
- Testing Plan
- Training plan
- How their daily work changes
- What looks different

Summary Tips

- 📖 Really think about the needs and expertise of your audience
- 📖 Practice summarizing into straight forward plans and benefits
- 📖 Do not condescend or try to talk above your audience
- 📖 You DO need people to get what you are talking about. You need acceptance, approval and backing along the way to get things done
- 📖 You may be the smartest person in the room, but trying to show that does not get results

Contact The Information Tamer

- Email: results@theinformationtamer.com

