

Writing Documentation

Effective writing is a key communication medium¹ for all aspects of project management ranging from formal contract documents, through meeting minutes and instructions to quick emails. There are several universal rules for effective business writing:

Focus the document:

One document one purpose - focus purely on the topic.

- Define your aim. Know precisely why you are writing the document and what you expect to achieve in the mind of the reader.
- Define your audience and write for them, you are writing for an objective, keep this reason firmly in mind. Set the 'tone' of the document to match the prior knowledge, attitude and preferences of the audience.
- Plan the content, list your sub-topics and stick to them. If you need to go off topic, then put the content in an Appendix or another document and reference it.

Make it flow:

Start with an introduction or executive summary that overviews the topic, tells the reader what they are going to learn and outlines the structure of the document. Then write the main body of the document and end with a conclusion or action list/recommended actions.

Write your document so that each section flows from one sub-topic to the next. This way, the user never has to pause to work out where they are. So before you finish each section, introduce the next section.

Have a clear structure:

Think carefully about your Table of Contents, it should be simple and easy to understand. Your readers need to be able to scan the Table of Contents to get a quick feel for what your document contains.

Write clearly:

The beauty of clear writing is that it creates nearly effortless reading. The reader should be able to understand your key points and follow your logic without needing to re-read sections. You achieve this by:

- Keep it simple!
- Tell a story that flows from beginning to end. Sell the unique 'value-add' of the piece at the very beginning and then lay out how you will achieve this before diving into the main part of the storyline.
- Use short sentences and paragraphs².
- Use adjectives with care and in the right order: opinion-size-age-shape-colour-origin-material-purpose and then the Noun. You can describe a 'lovely-little-old-oblong-French-silver-whittling knife. But if you start changing the order you will sound odd! A 'large green lizard' is not the same as a 'green large lizard' (size comes before colour).
- Avoid surplus content, clutter and jargon and write in simple, plain terms that everyone understands³ – all acronyms need to be explained.

¹ For more on **communication theory** see:

http://www.mosaicprojects.com.au/WhitePapers/WP1066_Communication_Theory.pdf

² Follow George Orwell's famous six rules for writing, taken from "*Politics and the English Language*":

- i) Never use a metaphor, simile, or other figure of speech which you are used to seeing in print.
- ii) Never use a long word where a short one will do.
- iii) If it is possible to cut a word out, always cut it out.
- iv) Never use the passive where you can use the active.
- v) Never use a foreign phrase, a scientific word, or a jargon word if you can think of an everyday English equivalent.
- vi) Break any of these rules sooner than say anything outright barbarous.



- Use bulleted lists to highlight points.
- Use tables to make data easier to read - they are easily scanned.
- Insert diagrams to explain difficult topics.
- Avoid gender-specific language and excessive abbreviations.
- Minimise the use of outlining and indents (where required try to avoid more than 3 levels of outline and used standard styles for the headings and contents).
- Make appropriate (limited) use of bolding, italics and underlining⁴
- Move supporting data and calculations to attachments or annexes⁵ – most people only need to know there is supporting data, they won't read it!
- Develop a sensible index for technical documents that are more than a couple of pages long
- Reference and attribute correctly – this simultaneously avoids plagiarism and builds credibility
- Check your spelling (spell checkers are not enough: to, two and tow are all correct spellings but change the meaning of a sentence).

Keep it simple:

Include just the right amount of information! Keep the document short and focused, but informative and helpful.

KISS - keep it sweet and simple. Some of the things to avoid:

- Arcane, complex and dense language – the better you understand the concepts you are trying to express, the more simply and clearly you can express them. But don't confuse elegant simplicity with simplistic.
- Special jargon is frequently used to impress rather than express! Only use jargon and specialist terms where they are essential. Wisdom goes arm-in-arm with simplicity. The keen mind is one that can absorb a complicated problem and then state it in simple direct terms that will transfer the idea quickly and accurately to the minds of others.
- Don't try to demonstrate that you are more intelligent than your reader by losing them in overly complex formulation or impenetrable jargon.

Allow adequate time:

Don't write in a hurry. Every document benefits from review and revision. Allow as long as possible between the first draft and the first review, ideally 2 or 3 days but at least overnight. Important documents benefit from 2 or 3 revisions with a space of several hours between each. A 'second pair of eyes' helps, you will be amazed at how many things a good proof reader finds after you have fully revised and edited the text.

³ The secret to good writing is to reduce every sentence to its core components. Eliminate every word that serves no function, every long word that could be a short word, every adverb that carries the same meaning that's already in the verb, every passive construction that leaves the reader unsure of who is doing what!

⁴ For more on **effective page layout** see: http://www.mosaicprojects.com.au/WhitePapers/WP1065_Page_Layout.pdf

⁵ **Appendix:** An appendix is an integral part of the main document, it contains data that is best presented outside of the main document text for clarity and is referenced from, or summarised within, the document (eg, complex data tables that support a chart used in a report should be in an appendix).

Annex: An annex is usually a standalone document that offers information additional to that contained in the main document and may be developed by someone other than the author(s) of the main document. Whilst annex are referenced within and support the main document, they can also be used on their own (eg, a detailed test plan can be used for testing on its own without the testers needing to read the full project plan that frames the requirements for testing).

Major Documents:

Depending on the document, one or more of the steps will be required (all of which take time and consume team resources):

Planning the document: Major documents require you to think, prepare and plan first. This includes outlining the content, structuring the sections, and deciding who will contribute what to each section. The key to communicating effectively is to keep the reader as the focal point – not the sender. Try to think about what the reader of the document needs and the information that will be most helpful to them.

Create the initial document draft: Most of the effort associated with the document is used in this step. Subsequent steps may take a long duration, but they do not take nearly as much effort.

Circulate the document for feedback and modify as appropriate: Track progress as the document (or sections of the document) is circulated for review, feedback and the document is updated based on the review comments. Depending on the particular document, this may be an iterative step. A document may have an internal review, followed by a stakeholder review, followed by a management review. After each of these reviews, the document is subsequently modified based in the feedback and sent to the next step.

Peer reviews: A peer review process should be used for all important documents, the review can be:

- Open, you ask one or two colleagues to review your work and comment;
- Blind, where either the reviewer does not know the author's identity (usual) or occasionally the author does not know who the reviewer was;
- Double blind where a third party (typically an editor) manages the process and neither the author or the reviewers know who the other party is;

Reviewers need to be frank and fearless for the process to be of value and the author needs to be open to criticism and used the feedback to improve the document and as a learning experience.

Gain approval: When the document has been updated, it will be ready for final approval. Some documents require formal approval in writing. Others are simply considered complete after the final round of feedback is received.

Like all completed deliverables there may be subsequent updates or enhancements that may require their own mini-document life cycle as well.

Status Reports:

The purpose of the status report is to communicate the true nature of the project and manage expectations; this requires focus and diligence on the part of the project manager or report writer. Typically a status report should include the following information:

- **The basics. Project name / project manager / time period / project description:** This basic information that needs to be included each time so that people know what they are reading.
- **Overall status indicator:** Typically there is a very short indicator that reflects the overall status of the project. A common way to express this is with color codes such as green (on track), yellow (caution) or red (problems) but try to avoid simplistic statements - range indicators are more valuable.
- **High-level status summary:** Provide summary information regarding the overall project. Make sure that the questions are worded in a way so that a project that is on-track will answer either all 'yes' or all 'no'. The questions are focused on the present and future state of the project – not the past. For instance,
 - Will the project be completed on time?
 - Will the project complete within budget?



- Will the project deliverables be within acceptable quality?
- Are project issues being addressed successfully?
- Are project risks being successfully mitigated?
- Are all client concerns being addressed successfully?
- **Comments:** Give more information on any questions above that were answered 'no'.
- **Significant accomplishments this period:** List major accomplishments from the previous reporting period. If the planned accomplishments from last period were not completed this period, the project manager should provide comments as to why.
- **Planned accomplishments for next period:** List major planned accomplishments for the next reporting period.
- **Additional comments or highlights:** Comments in other areas that the reader should know that are not be reflected in the standard sections of the status report outlined above.
- **Annex:** There are many logs and reports that might be of interest to the reader. Potential attachments to the main report include:
 - Change Log;
 - Issue Log⁶;
 - Risk Register⁷;
 - Schedule extracts;
 - Project metrics / statistics; and
 - Earned value reports.

These attachments are best provided as links to the current documents held in a 'project portal' - printed versions go out of date very quickly.

Understand and use punctuation wisely:

Quotation marks mean someone is "talking" they are used for recording the words spoken by a person and occasionally for identifying citations and titles. Single inverted commas are only used for 'unusual' uses of a word. Highlighting is best achieved by italicising or bolding text.

The Apostrophe: An apostrophe is used to express ownership even if the word ends in a vowel; eg, the boy's book. When dealing with more than one thing or a word ending with 's', generally, the apostrophe goes after the s at the end of the word. So if you're writing about a group of boys and their pets, you would write the boys' pets. But: his, hers, its, ours and yours don't need apostrophes. Ever.

When you're turning something into a plural, don't use an apostrophe. So boy becomes boys, pizza becomes pizzas, CD becomes CDs.

You also use an apostrophe when you're contracting a word. **You are** becomes **you're**. NOT your.

Colons and Semicolons: A colon is often used to introduce a list of items. I needed three things: a comma, a full stop and a question mark. Also use a colon to introduce an explanation or definition.

⁶ For more on **issues** see: http://www.mosaicprojects.com.au/WhitePapers/WP1089_Issues_Management.pdf

⁷ For more on **risks** see: http://www.mosaicprojects.com.au/WhitePapers/WP1047_Risk_Management.pdf



A semicolon is used to join two statements that could be separate sentences, but you want to convey a relationship between them, like this: *John likes steak for dinner; Joan likes a roast.*

English and American punctuation rules are different – Australia tends to use UK punctuation.

- See more on UK rules at: <http://www.examples-help.org.uk/punctuation/index.htm>
- See more on USA rules at: <http://www.englishclub.com/writing/punctuation.htm>

Grammar mistakes to avoid:

A badly spelt piece of writing undermines the credibility of the writer even more than the poor use of punctuation – spell checkers find the misspelt words but won't always identify misused words.

Bear -v- Bare: You *bear* weight with your *bare* hands.

Companies are singular: They are treated as a single person in law and grammar. BHP Billiton announced **its** plans for is correct! BHP announced ~~their~~ plans for is wrong!! This applies to all organisations, companies and corporations.

Compliment -v- Complement: *Compliment* means to praise someone; *complimentary* can also mean free. *Complement* means something supplements or completes something else (the wine *complimented* the meal) also means a full crew of personnel; eg, the ships *complement*.

Effect -v- Affect: Affect is a verb meaning *to influence*. Examples include: '*Our new policy will affect the way we do business*' and '*The affected employees will adjust their work schedules*'.

Effect is usually a noun meaning *the result or consequence*; eg, '*What is the overall effect of the new policy?*' However, Effect can be also be used as a verb with the limited meaning of *to bring about*; it is often associated with the idea of change; eg, '*The company effected a policy change*', or '*We must effect changes in our safety regulations*'.

If you use the suffix *-ive* in business writing, the word you always want is effect; eg, *effective* measures, *effective* date, *effective* managers.

Fair -v- Fare: Fair = free from favouritism or self-interest or bias or deception; conforming with established standards or rules. Fare = the sum charged for riding in a public conveyance (eg, They paid the fare for the bus).

Its -v- It's: *Its* is most often a possessive adjective, like my, his and her (the cat licked *its* paw). *It's* is an abbreviation of 'it is'.

Mentee -v- Protégé: these terms are to a degree interchangeable. A mentee is a person who is advised, trained, or counselled by a mentor. A protégé is one who is protected or trained or whose career is furthered by a person of experience, prominence, or influence. All protégés are mentored, but not all mentees are necessarily protégés.

Principle -v- Principal: *Principle* refers to a fundamental truth. *Principal* means first or the highest in rank.

Personal -v- personnel: *Personal* refers to something of a particular person's, something done in person. *Personnel* (a plural noun) refers to the people employed in an organization, business, or service; or things used by an organisation to deal with many people, eg a personnel file.

Spelled -v- Spelt: In all of the main varieties of English, *spelt* and *spelled* both work as the past tense and past participle of *spell*, at least where *spell* means to form words letter by letter. In American English *spelled* is always



correct. But when *spell* carries the sense of magic or to temporarily relieve (someone) from work, *spelled* is the preferred form throughout the English-speaking world.

Weather, whether or wether: Weather refers to climate; it can be used as a noun or a verb. Whether is a *conjunction*, which joins two words or phrases together; it is similar in meaning to the word “if” and links together two possible choices such as: The boy shouted, “I plan to go out whether you like it or not!” A ‘wether’ is a male sheep, usually a castrated one!!

Who or whom: The normal accepted practice in current English is to use *who* in all contexts. However, according to the rules of formal grammar, *whom* should be used after a preposition; eg, To **whom** it may concern [here, *whom* is following the preposition *to* - still fairly common usage]; and also in the object position within a sentence - now obsolete - *whom* is never the subject of a verb (*who*, on the other hand, is always the subject of a verb). If you are unsure which to use, use *who*. It is much more common than *whom*, and the use of *whom* is generally considered rather old fashioned.

Your -v- You’re: *Your* describes something a third party possesses (eg, *your* house). *You’re* is an abbreviation of ‘you are’.

Get your symbols the right:

Symbol	Words	Example Use
=	equals	1 + 1 = 2
≠	not equal to	1 + 1 ≠ 1
>	greater than	5 > 2
<	less than	7 < 9
≥	greater than or equal to	marbles ≥ 1
≤	less than or equal to	dogs ≤ 3

10 Additional tips for Emails:

1. **Be specific.** Keep emails short and to the point to maximise the chance that they are read and lessen the chance that the reader will press "delete" without reading to the end.
2. **Be Prompt.** Respond within a day or two after an email is sent shows you care about the message and the sender. Even if you are not able to attend to something right away, telling the person when you will act on it shows professionalism and attentiveness.
3. **Use a clear subject line.** Everyone receives a huge amount of email and needs an easy way to know whether to open the email, where to file it, and which ones need action.
4. **Use the subject line to signal urgency.** Wording such as ‘response needed’ or ‘urgent’ conveys what is expected and by when; ie, ‘Client contract - confirming dates - response needed’, or, ‘Board meeting - draft agenda - response needed by Tonight’.
5. **One topic per email.** Limit requests or important news to one subject per email. This allows your subject line to reflect your message, and your reader will know where to file it and how to address it (at a glance).



6. **Minimise CCs.** Decide carefully who should be CC'ed on each email. Do not "reply all" unless everyone needs to be included in the reply! Often sending a response to the sender is enough and it helps minimise clutter for others.
7. **Minimize visual embellishments.** The use of CAPS LOCK or **bold** to highlight words can be misunderstood. Although highly visual people love playing with visual cues, they can be misunderstood by others. In order to minimize sounding "loud" (often associated with CAPS LOCK) or annoyed (often associated with bold), just use regular font styles; it's safer.
8. **Include a complete email signature.** It is helpful to have all one's contact information clearly and easily accessible so readers of your email can contact you in the most effective way for them.
9. **Avoid forwarding jokes.** Most people don't appreciate this type of email. Confine work email to your work and avoid non work-related material
10. **Pick up the phone.** If there's a conflict or misunderstanding talk to the person. Your automatic reaction may be to send a quick email back, especially if someone has misunderstood something in your email, but this is not advisable. Email is the worst method of conflict resolution and can exacerbate a bad situation.

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