



Establishing Policies and Procedures in a Matrix-Management Consulting Company

By *Katharyn Bine*

A quiz: Three technical writers from matrix-management consulting company ICF attend the Tech/Comm 1999 conference. They listen to the speakers and get excited about creating formalized policies and procedures for their company and presenting to management a proposal to create a User Information Products Group.

What happens next? More than you might expect.

The idea for the new work group germinated among colleagues Doug Delorge, Glenn Chambers and I after attending the Tech/Comm 1999 conference in July of this year. We were particularly intrigued with the presentations by Saul Carliner, former president of STC, on the value to an organization of having formalized policies and procedures. His point was that with policies and procedures in place, an organization has a means of gather-

ing meaningful metrics.

We viewed Carliner's philosophy as a good fit for ICF and its emphasis on matrix management. The use of matrix management allows a project manager to create teams for projects that cut across normal business units. Such teams include one or more software developers, at least one content expert and, depending upon the nature of the project, a technical writer. The project manager is most often a software developer. The content expert may come from a business unit though, in some cases, the content expert is the client. In theory, matrix management optimizes human resources. In real life, it can do that but at a cost: Employees must balance the demands of different projects, and sometimes that balance is lost.

After discussing our options, we decided to do two things: Speak with management about our goal of creating a User Information Products Group and identify a senior manager to

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SIG Member Urgo to Teach Online Course for UCLA

OnlineLearning.net, which holds the exclusive worldwide electronic distribution rights for courses developed by UCLA Extension for online delivery, announced recently that Raymond E. Urgo, a top technical communication professional, principle of Urgo & Associates and STC's assistant to the president for special interest groups, will teach "Introduction to Policies and Procedures Communication" during the school's fall and winter quarters.

UCLA Extension, which oversees the nation's largest single-campus continuing higher education program, enlisted Urgo to teach in the classroom in January 1998. His first assignment as an online instructor was in January of this year.

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represent us.

For our management representative, we chose Janet Fahey, a technical writer at ICF before any of us came on board. She seemed the perfect choice, given her ability to motivate employees and get results while maintaining excellent work relationships.

We also did what we could to make it easy on our managers. When we went to executive vice president Mike McKelvey, we did so with a plan that included an initial mission statement, Janet's agreement to help us and a lot of enthusiasm for our proposal. He gave us his approval to continue with our work.

The following week, I compiled a long list of reasons why the effort was needed, refined the mission statement, and listed our goals for the next six months to two years. Glenn created a style sheet, while Doug reviewed the mission statement and pursued an initiative on knowledge-management systems. Janet began looking within the company to see if other personnel should be included in the project.

We were moving quickly but soon realized that we could not keep up the pace. Many of our goals required support from developers, project managers and senior management – none of

which would materialize overnight.

After four weeks, though, we had a mission statement and two additional team members, both of whom design graphics for the Web and face many of the same problems as those encountered by technical writers. Week four also found us contacting other business units to determine which persons should be invited to join the team. We bypassed management and went directly to the persons we thought the team needed. Success was not always forthcoming. For example, a manager in one business unit was unaware of our initiative and objected to having any of his staff participate. We had to back up, get support from another manager, and try again.

We eventually had a total of nine members and representation from each business unit and do not expect to increase the size of the group in the next six months. We meet every two weeks and discuss topics such as software upgrades, management support, metrics, knowledge-management initiatives, usability testing, business partnerships and conferences we would like to attend.

Our meeting on November 3 marked a significant milestone: We had achieved all of our external goals and most of our internal ones, two months ahead of sched-

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SIG Membership Grows in 1999

This report reflects changes in membership for the Policies and Procedures SIG as of October 31.

For the first 10 months of the year, SIG membership has grown dramatically. Membership now stands at 840, a growth of 65 percent since the same time a year ago. Since January 1, the SIG has welcomed 409 new members.

While the names of our new members are too numerous to list, it is interesting to see where our new SIG members call home. The new members for 1999 hail from the following locations:

USA	344
Canada	41
International	24
Total	409

Thanks to all new and renewing P&P SIG members. Without your support, our continued growth and success would not be possible.

If you have any questions or suggestions regarding your P&P SIG membership, please feel free to contact Joy Osaka-Lu at JLJO@aol.com.

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"Introduction to Policies and Procedures Communication" covers the principles and methods of how an organization operates in a consistent manner are developed, delivered, managed and used. The course provides a detailed overview of the policies and procedures discipline; the stages and issues involved in developing policies and procedures; effective writing styles, formats, techniques and structures for policies and procedures information; and the challenges, value and importance of policies and procedures for users and organizations.

Urgo's experience in the field of policies and procedures is both broad and varied. He has held positions as a writer, analyst, supervisor and project leader with New York Telephone, NYNEX, Northrop and Farmers Insurance. His clients include Kinko's, Taco Bell, Toshiba and Xircom.

Policies and procedures, says Urgo, are integral to every company. "Any organization, from a local delicatessen to a multinational organization operates, whether documented or not,

[according] to policies and procedures. Organizations tend to place high demand for policies and procedures information when they are growing fast, undergoing major reorganizations, meeting regulatory requirements or seeking quality certifications."

OnlineLearning.net limits class size to 15 to 25 students to ensure the greatest degree of personalized interaction between student and instructor. According to the university, online courses afford greater flexibility than traditional programs because students can participate anytime, anywhere, day or night. Assignments also can be completed at the student's convenience. Through OnlineLearning.net, UCLA Extension's top-rated instructors are specially trained to respond to the needs of students in an online environment.

For more information or to enroll in an online course, visit the school's Web site at www.onlinelearning.net.

*Deadline for the March 2000 issue:
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Please email Michelle_1962@yahoo.com with articles

ule. This was possible because we used planning documents, set measurable goals, received management support and had members willing to take the initiative to get things done. I can't wait to see what the next four months will bring.

Editor's Note: Look for Part II of this article in the March issue of STEPS & SPECS, which will discuss the specific steps taken to implement policies and procedures in a matrix-management organization.

Katharyn L. Bine has 13 years' experience developing Internet, electronic and printed products. She has taught courses at George Washington University and the U.S. Department of Agriculture Graduate School. She currently works for ICF Consulting in Fairfax, VA.

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The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.