

Proposal: [Product Name] Technical Product Description Revisions

Introduction

During a follow-up meeting on the usability and structure of the [Product Name] technical product description (TPD), the marketing, quality assurance, development, and professional services teams determined several changes needed to the document and its delivery. This proposal identifies those changes and estimates the hours and costs associated with making them.

Audiences

We have three audiences: distribution operations management at customer prospects, information technology management and professionals at customer prospects, and information technology management and professionals at partners. Our objective is to help each of these readers see how voice—specifically [Product Name]—fits into and benefits the operation they already know.

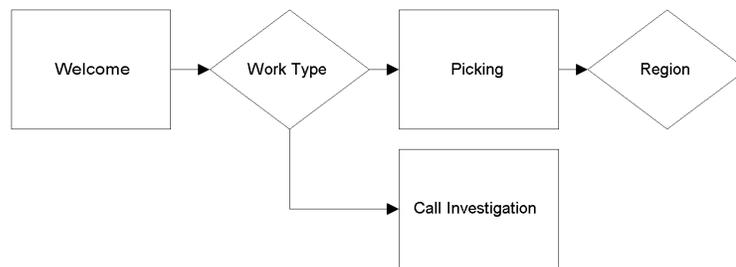
Recommended Documentation

During the meeting, we discussed several specific improvements to the batch and direct versions of the TPD. After the meeting, another meeting formed, in which we discussed other improvements. Each meeting resulted in different recommendations and conclusions. What follows is a list of all improvements and recommendations from both meetings; [Client] can prioritize these recommendations and decide which to implement and when.

Flow Chart

A high-level flow chart providing a map of the task dialog would help pull together the pieces of task dialog detailed throughout the TPD. It would also give the reader a bird's-eye view of what happens during the task. If it mapped to sections of the TPD itself as well, it would provide a visual table of contents of the task distribution throughout the TPD.

A familiar flow chart could diagram the task dialog:



Each block in the diagram could correspond to a section of the TPD. Determining what becomes a block requires collaboration with at least one senior project manager (SPM). With only one involved, the process would probably take a few hours; with more opinions, of course, that multiplies. Dividing the TPD into those blocks could be a quick process, if it requires few modifications from the current version--perhaps a day of work. Doing so if it requires more significant changes could take anywhere from a couple of days to a week. Drawing the diagram itself after completing those processes should take no more than a few hours. Therefore, this option ranges from about 16 hours of work at the low end to 60 hours.

Transaction Diagram

A transaction diagram like the one currently found in the direct TPD should also appear in the batch TPD. The difficult part will be agreeing on what transactions appear and what level of detail it should contain; drawing the diagram once the [Product Name] team makes those decisions should not take more than a day of work.

Task Summary

Both versions of the TPD should include a brief task summary giving the dialog of one complete successful picking pass. Completing this would take no more than an hour or two.

Complete Task Dialog

Both versions of the TPD should allow the SPM to include the complete task dialog at the level of detail in the [Pilot Client] put-to-store product requirements document--that is, not including every single lookup table request, but having each terminal prompt appear as a numbered paragraph with the transactions and responses for each. Assuming that the task has not changed significantly from release 26 to the current release (30), completing this would take about two and a half days; with some changes, about a week.

Delivery Method

The group discussed two potential delivery methods for the TPD: online or print. The group's consensus seemed to be that an online version would serve the purpose of giving the reader the option to see as much or as little information as he or she wants, with whatever kind of detail (operational or technical) he or she needs. But it also agreed that it would not serve either the purpose of the SPM to have a tool for use during meetings with the client or the purpose of the client to have a document for referral later; clients seem to prefer having a paper document over an online one.

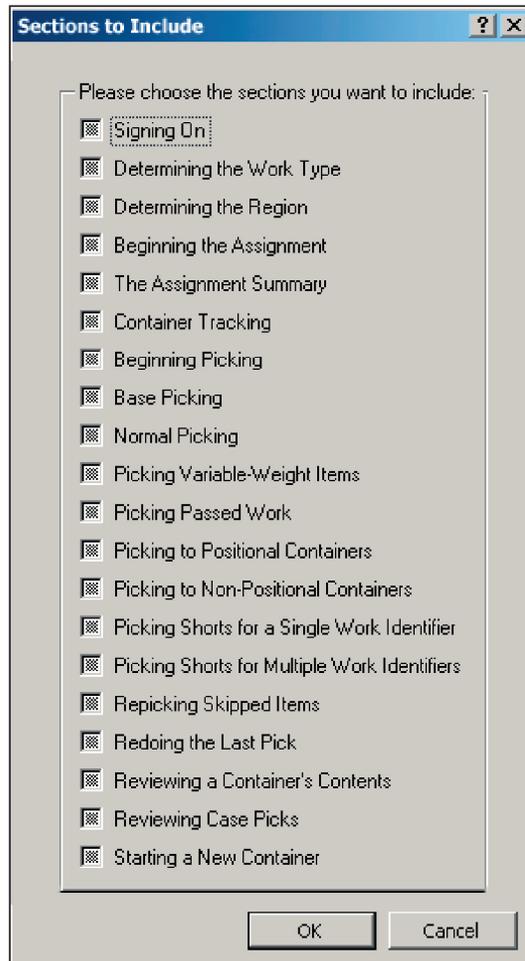
The preferred method was having all of the information--executive, operational, and technical, all sections of the task, batch and direct--available for use, but with a mechanism for compiling only that information the SPM anticipated needing for that particular client.

This method would ask the SPM for three types of information: batch or direct, what sections of task to include, and what level of detail to include (executive summary, operational overview, or technical details). I would implement this by creating a Visual Basic applet that would run upon opening the Microsoft Word template for the TPD.

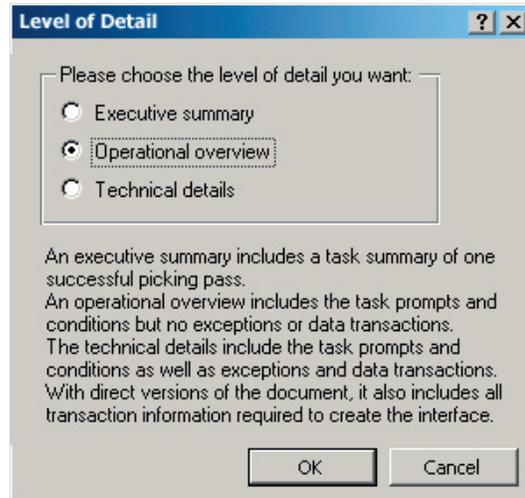
One dialog box (perhaps the first, but I cannot be sure which sequence of questions makes most sense until I begin to implement) would ask whether the document is for a batch or direct-interface customer.



Another dialog box would ask the SPM for the sections to include. (Note that this example does not show all of the sections and does not necessarily reflect the sections as the SPMs would determine them to be; I present it only to facilitate envisioning the end product. The final product would also include a Select All check box.)



The final dialog box would ask the SPM for the level of detail that the document should include.



After gathering this information, Microsoft Word would select the appropriate information to include and assemble it into a complete document. The SPM could then save and print the document and leave a copy with the client if desired. The template and all content would reside on a shared network drive (presumably on [shared folder]) and SPMs could create them as frequently as necessary from that directory. Remote SPMs could download the complete directory periodically or could request a CD-ROM containing them and copy either to their local drives for faster compilation.

Consensus in the meetings seemed to be that the TPD task dialogs should not show every possible configuration, so instead they could show only the default configuration(s) used in the demonstration version of the application.

Dividing the information into sections is likely to take a few days of work beyond the one- to five-day process of understanding what those sections are (see Flow Chart above). Coding the dialog boxes would probably take couple of days, so this option would take three to eight days of work to complete.

Field and Parameter Descriptions

Some of the fields and parameters need better descriptions with more detail for SPMs to be able to answer client

questions. I can estimate the effort involved in improving these after I receive a list of those descriptions that require improvement. [Senior Project Manager] is gathering that information from his fellow SPMs.