Fall 2000

impact!

The Official Newsletter of the STC Marketing Communication SIG

http://www.stc.org/pics/marcom

Effective Proposal Support

Where the Entire Corporation Is the Team

by Bill Lambert, Northeast Ohio Chapter

Diebold, Inc., designs, manufacturers, sells, and services ATMs, security products, campus card systems, software, and services to financial, education, healthcare, and commercial markets worldwide. Within this large and growing corporation, the sales communications department (that's me) has become a self-run business. My customers number more than 350 sales representatives and anyone else who calls for my services. It's like I run my own store, and the corporation is my customer.

The requests for proposals (RFP) I work on require corporate, technical, and pricing information to be provided to our potential customer in a specified format. This article discusses how this operation has evolved to support such a large number of customers through a decentralized proposal response process.

Rough Beginnings

It's sometimes amazing when you look back to see how things have changed at work. In 1991, I was assigned the task of filling the proposal support position. Once I settled in, I worked on 21 proposals that first year. As an experienced technical writer, I was able to craft decent answers and research the right information to respond to the customer requests. But I hardly had a clue as to what I was doing as a sales writer. Basically, I went on instinct and relied on my acquired product knowledge.

Proposal Support at Diebold Today

Today I work on over 120 proposals each year, plus more than 400 artwork requests for proposal graphics and binder covers. I also review proposals for business and legal issues, design cover graphics, work on response strategies, and help our new sales reps get started.

Time Considerations

To my customers, every call and RFP is important, everything must get done on time, and every response must be the best it possibly can be. Each project must be attacked with a sense of urgency. My success depends on quickly and accurately creating documents that help customers

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inside...

Crash Course

Getting Started with GV-TOW!

by Heather Martin, Southwestern Ontario Chapter

For me, the thrill of a brand-new project or assignment is too quickly taken over with the chore of actually getting started. That deadline that at first seemed so reasonable looms ever closer—focus becomes difficult, sleep fitful, and random thoughts and ideas begin to swirl, reminding me I have yet to start. Surely, I am not alone.

As writers, getting started on a new project is often our most difficult task. Recently, I polled members of the STC Marcom SIG list server to find out what gets them going. From an "initial brain purge using good ol' pen and paper" to formalized project outlines and information mapping techniques, every writer had a slightly different

STC society for technical communication

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Editorializing

by Deborah Ausman, Houston Chapter

Consider yourself warned: Attending an STC conference can be hazardous to your social life.

Why? Because you'll find yourself inspired to volunteer. The STC Conference in Orlando was my first in five years of STC membership. I always figured that the conference would be like a very long chapter meeting… which would mean there'd be lots of folks talking about online help! Ugh.

I couldn't have been more wrong. For the first time since becoming an STC member, I found myself surrounded by people who Do The Same Thing I Do. Yes, Virginia, other STC members *do* write marketing materials!

You hold the fruits of my inspiration in your hands. Meeting all the SIG members at the conference and hearing about their ideas for growing the SIG and this publication moved me to take on *Impact!*'s managing editor position from the capable hands of Michele Davis. SIG members like *Impact!*, but the folks I met at the conference said they wanted more. More tips on how to do their jobs better. More opportunities to connect and network with other SIG members. And more about how they could grow as marketing communicators.

WARNING: Attending an STC conference can be hazardous to your social

Providing "more" means a bigger publication, both in terms of pages and staff. With this issue, we've added a series of regular columns: a book review, a tips corner, a careers column, and a member profile. Our new associate editor, Paula Lentz, will also be contributing periodic articles on marcom education. These new columns are in addition to regular feature articles, such as Bill Lambert's cover story on his process for developing sales RFPs. My thanks to all the staff members for taking on column duties and to Heather Martin for stepping forward to handle the "tips" column.

We hope these new columns inspire you. Help the columnists by pitching ideas or even full-blown articles to them. Write a feature story—conference attendees said they want to hear more of the latest and greatest marcom tactics and strategies. And use the listserv to tell us what you think about the newsletter or to raise issues important to you—you'll probably find those conversations making their way to the pages of *Impact!*

Most of all, please take time to enjoy *Impact!* I know the staff has enjoyed putting it together.

Deborah, a senior member of STC, is a science writer and marcom consultant specializing in scientific software and pharmaceutical and chemical discovery. She is currently based in Houston but is planning her escape.

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Reprints

You may reprint original material appearing in *Impact!* as long as you acknowledge the source and send the managing editor a copy of the article.

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On the SIG

by Kelli Gant, Marcom SIG Manager
San Francisco Chapter

As you know, SIGs are an important part of STC and are the reason for much of our STC membership retention. In his recent report to the board, Raymond Urgo, assistant to the president for SIGs, reported that "for the first time in years (or ever) the SIG Program now has a status of 'excellent.' 82% of the 17 SIGs now have a status of excellent or good. (compared to 64% in 1999)." The SIGs' statuses are 41% excellent, 41% good, 6% fair, and 12% poor. Last year at this time, the statuses were 35% excellent, 29% good, 6% fair, and 29% poor. All the SIGs have managers, and no SIG has been dormant.

I am happy to report that your Marketing Communication SIG has a "good" status, and our goal is to achieve "excellent" this year. Our success in reaching this goal is directly related to our volunteering membership. Since the STC Conference in May, several of you have volunteered to help with *Impact!* and our SIG Web site.
I would like to extend a "thank you" to our new volunteers, our current team, and those who helped through the past year. Without your efforts, our SIG would not be as successful. If you would like to join the team and offer your skills, please contact us.

In addition to our "good" SIG status, our SIG membership is growing every month. Our September membership count is 1,496. Moreover, as you look through our membership list, you can see that we are an extremely international SIG! Many Marcom SIG members are taking advantage of our knowledge pool and diversity by using the SIG listserv to ask questions about work and professional development. Joining the listserv is an excellent way to tap our membership's experience. One criterion to advancing our SIG status to "excellent" is to increase our listserv usage. Currently, our listserv enrollment is only 259. We are looking at ways to use the listserv better for general SIG announcements and to communicate marcom news.
If you have ideas, voice them!

I am looking forward to another great SIG year. Thanks to all of you!

Kelli, a senior member of STC, is director of technical communications at Avolent. Although she did contract marketing writing for several years, she is now managing documentation development for application engineers and system integrators. Kelli is based in San Francisco.

Marcom SIG Membership
(as of September 2000)

Australia	5
Austria	2
Belgium	2
Canada	140
Finland	5
France	18
Germany	3
Greece	1
Hong Kong	1
India	7
Ireland	1
Israel	16
Italy	5
Japan	2
Korea	1
New Zealand	1
Portugal	2
Singapore	2
Slovenia	3
Sweden	9
Switzerland	3
The Netherlands	2
UAE	1
United Kingdom	5
USA	1259

Attention

The copy deadline for the Winter issue of *Impact!* is **January 12, 2001**.

Exposing Ourselves

Our featured profile is Christine (Chris) White, marketing program manager at Technology Building, Inc., and member of STC's Atlanta chapter.

How did you become involved in marcom?
I first became involved in marcom somewhat by accident. I had been doing contract technical writing work for Square D while I was still in college. When I graduated, they wanted to hire me, but there were no open technical writing positions. The closest position was in product marketing. For the first six months, I straddled the fence somewhat, helping tech pubs when they needed me and working on presentations and other materials the rest of the time.

Eventually, I was moved to the product marketing support group, where I was responsible for writing datasheets and other marketing-oriented materials. These datasheets were more technical in nature than marketing oriented, but they were my first real introduction to marketing communications. I worked for Square D for just one year and was contacted by Jim Ducey of Technology Builders, Inc. (TBI) and hired as a communications specialist. Officially, I was hired as part of the marketing

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Impact in the Classroom

Informational Interviewing

by Paula Lentz, Twin Cities Chapter

Editor's Note: This article is the first in what we hope will become a series or forum about how to give students "real world" experiences in the marketing communication classroom. The column is for educators and non-educators alike. Future topics for this column include team building, group work, and project management activities.
If you have an article to contribute to this forum or if you simply have ideas and suggestions for this column, please email them to Paula at ginderpj@uwec.edu.

Rationale

In my course, "Business Presentations," I teach a unit on interviewing skills, especially as they apply to a job search. By design of their major, marketing students have a wide range of career options. Yet when asked to think about the specific jobs they want to pursue, many do not know what they hope to get out of their education—either because they have not thought about it or in some cases because they just don't know how to pursue the jobs they want. Informational interviewing is the perfect option to help students connect their education to their lives after college.

Informational interviewing

The informational interview is a low-pressure situation in which students are not looking for employment or internships. Instead, students ask questions concerning whatever interests them about their fields or "dream jobs." The interview gives students a chance to research potential career paths and discover their options; offers them the opportunity to network with professionals in their fields; and provides them with an occasion to practice their interviewing, listening, and nonverbal communication skills.

The Assignment

1. Prepare an interviewing packet for the students. The packet I use includes a letter of introduction to the interviewee, a rating form used by the interviewee to assess the student's performance, and an envelope the student uses to return the evaluation form to me.
2. Tell students to contact a business of their choice, preferably one they might want to work for some day, and arrange a 15 – 30 minute interview.
3. In class, prepare the students for the interview by asking them to brainstorm questions they can ask their interviewees regarding the interviewee's corporation or job, the job field in general, and the company's hiring policies and procedures.
4. After the interview, make sure the students write thank you notes to the interviewee.

Feedback

So far, I have received only positive feedback regarding this exercise. Some of it has been validating (students saying, "You were right when you told us in class that ____"), and some of it has been enlightening and encouraging (business people telling me that they think this is a great exercise and suggesting ways to improve it). I have used the informational interview exercise for three semesters, each time tweaking it to make the experience more valuable for my students. I encourage everyone, students and non-students, to consider informational interviewing as an exercise in career and personal development.

Paula, Impact!'*s associate editor, is a lecturer in business communication at the University of Wisconsin-Eau Claire, where she teaches Business Writing and Business Presentations. Prior to teaching, she was a technical communications specialist for a company that produced veterinary practice management software.*

Share Your Knowledge!

Do you know something about any of the topics below? Marcomites at the conference expressed an interest in hearing more about these areas… and topics in general that will give them insight into trends in our field. Contact Deb Ausman, managing editor, if you're interested in writing 500 words for a future issue of *Impact!*

- Marcom for ecommerce (particularly as compared to traditional media)
- Creating interactive brochures and other collateral
- Web site development (how to avoid hype and generate business)
- Tools of the trade and their application in marcom
- Tips and advice on entering the field (and surviving once you get there!)

The Book Rack

Sales & Marketing: The Only Book You'll Ever Need if You're New to Sales & Marketing

Review by Laura J. Mulcahy, Washington, DC Chapter

Need to pull a marketing all-nighter? Trying to play catch-up in your new field? No time to take a marketing course? *Sales & Marketing*, published by McGraw Hill, offers a bandage for what ails ya.

I joined my company's marketing team in late 1999, and I remember my first meeting like it was yesterday. I was the new kid on the block. The meeting introductions were easy. Then I felt as though I had been transported to a foreign land where I could understand only half of what the natives said. Acronyms flew. Catch-phrases launched. My brain melted.

That night I raced to a local bookstore, scouring the shelves for marketing books that would help me understand this new culture. I landed on *Sales & Marketing*, and I have been using it as a reference ever since. The book is broken into ten logical chapters and also includes a glossary, a list of additional resources, an index, and a "how to use this book" section.

This book is perfect as a brief how-to. The first chapters describe the science behind marketing, how objectives are determined, ethics, using consultants, and conducting forecasts. Ensuing chapters explore such topics as competitive analysis, creating demand, marketing tactics and strategies, and distribution. The final chapter provides information on marcom, including writing tips aimed at public relations, investor relations, customer relations, and trade shows.

Many of these sections include "red-alerts" such as, "There is much wisdom in the expression 'if it ain't broke, don't fix it.' Many organizations have spent millions of marketing dollars on efforts to repackage, reprice, reposition, or reintroduce products and services that were already well accepted by the market. The results are rarely satisfying (witness New Coke), and can occasionally be disastrous."

Sections also contain timesaver tips, including, "Focus groups can provide a very quick way to obtain valid input regarding your market. In many instances, you can set up and conduct a series of focus groups within a week, and the first impressions are available immediately afterwards." My company conducted two focus groups where the participants noted many issues we hadn't considered.

Sales & Marketing is both educational and interesting. It isn't a replacement for coursework, but if you need a brief introduction into the world of marketing, this book is perfect.

Sales & Marketing: The Only Book You'll Ever Need if You're New to Sales & Marketing, Ed. by Mari Florence, McGraw Hill, Los Angeles, CA, 1996, ISBN: 0-07-001568-6, 119 pages, US $12.00.

Laura, a senior member of STC and production editor for Impact!, *is a writer, editor, and desktop publishing slave in the Northern Virginia high-tech community. She was a lurking member of the Washington, DC, Chapter until 2000, when she joined the newsletter staff as copy editor.*

...Exposing Ourselves

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group because TBI's product development was still in its infancy. For two and a half years, I was the only writer at TBI, in charge of all marketing collateral as well as all technical writing materials. When the company got too large for me to handle all of the writing, we finally hired a new technical writer. When we were preparing to hire this writer, I was given a choice: marketing or technical. I chose marketing.

What types of marcom projects are you working on now?
I now focus entirely on marcom. As marketing program manager, I am responsible for writing all print and online corporate marketing collateral (except public relations materials), as well as collateral for both of our software products. I also am responsible for creating demonstrations of our products, so my role has taken a turn toward multimedia. In creating these demos, I write the script, record the audio, work with background graphics, capture screen shots, and compile everything into a comprehensive demo for both CD and Web.

What do you enjoy most about marcom?
I love marcom work, especially the variety and creativity required. I especially enjoy the multimedia aspect, working with Shockwave, graphics, and audio. I don't believe I would ever have had the chance to expand my skills in this area if I had stayed with technical writing. I can't see myself going back to straight technical writing for anything.

...Effective Proposal Support

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understand and be comfortable with their buying decisions. Completing all the proposals I receive from my customers would be overwhelming if I wrote each document from scratch. The only way I have been able to keep up with the work has been to develop a shared, decentralized operation. To do this, the sales rep and I determine the tasks and keep in constant communication throughout the proposal development process.

The "Shell"
To handle an increasing number of proposals, I limit my work to providing the "shell" for our response. I read the RFP, outline the response, fill in the corporate information, take care of the bid bonds and forms, and respond to the legal issues. What is left is a document clearly marked by "???" where the sales reps fill in technical and local support information. Meanwhile, the sales reps build their response to the bid. When I send out the shell, they cut and paste their answers and pricing into the document. Once all of the "???" are gone, the proposal is complete.

Style
In the product descriptions, I aim for a style that's more conversational than technical and abstract. Product descriptions are written from a "5,000-foot level," providing enough information to make the customers comfortable with what clients are buying yet not so detailed that they get bogged down and confused with too much technical data. I use the software that lets me apply information mapping strategies to create and format product description files. This format not only helps me organize the information, it also helps the customers feel more comfortable reading, understanding, and referring to the material.

Sales Support Tools
The sales tools produced by sales communications include "boilerplate" files (product descriptions used in proposals), custom graphics, and binder cover graphics produced by an outside vendor. Sales reps and other employees have easy and immediate access to more than 450 proposal boilerplate files covering our major products. New and updated files are automatically downloaded to all of our sales people. A simple program on their PCs helps them quickly build a proposal using these boilerplate files. In addition, I have created an intranet site which provides online access to these files and for viewing and ordering the graphics used with proposals. This site gets more than 300 visits a month.

Full Control
I have found that with the critical nature of proposal schedules, it is extremely important not to lose control of any aspect of the operation. When I receive a project, I work with the originator to clearly define our respective tasks. I then personally control and follow every detail of my work at each step. It's not unusual to see me running around the complex to get things signed, copied, and reviewed to keep projects on schedule.

The Benefits
Because of the proposal support tools that are in the hands of our sales reps, these people have a better opportunity to

- focus on pricing strategies
- address the pertinent customer relationship issues
- respond faster to customer requests
- spend more time on selling

Relationships
The success of our proposal support program has taken ten years to evolve to where it is today. Relationships have been carefully developed so the support throughout the entire corporation is always there to get the job done well and on time. And the company enjoys the benefits of our decentralized model of sharing the work with the field. It truly is a team effort where everyone wins.

Bill (lamberw@diebold.com) manages the proposal support function for Diebold sales representatives and has been writing technical documentation and sales support material for over 25 years. He lives in North Canton, OH.

Join the Marcom SIG listserv!

To join the Marcom SIG listserv:

1. Send an email message to **lyris@lists.stc.org**
2. Leave the **Subject** field blank.
3. In the **Message** field, type **subscribe stcmktsig-l** (use a lowercase "l").

✓ You will receive a message approving your request.

- Post to the listserv by emailing **stcmktsig-l@lists.stc.org**

To access the listserv archives:

1. Go to: **http://lists.stc.org/cgi-bin/lyris.pl?enter=**
2. After **enter=** type **stcmktsig-l**
3. Scroll down to the field labeled **Did you forget your password?**
4. Type your email address, and click **Get Password**.

   ✓ You will receive an email message with your password, which enables access to the archives.

Work in Progress

The Secret to Success

by Jennifer Sheedy, Boston Chapter

What does it take to be successful in marcom? Marcom newcomers are often able to write and communicate well; the hurdle we face is how to do so successfully. And believe it or not, in marcom, image is everything.

Good writers must not only be passionate about writing, but be able to listen to their clients and be a part of *the clients'* target audiences. An important role as a marcom writer is seeing all sides to the story. Lining up opportunities to practice our writing abilities is one way to break through the barriers of marcom, but ultimately, professionalism—how we do our job—determines our success.

When you think about it, our work is all about bringing people together. Often our work seems "behind the scenes," brainstorming and assembling an array of information to produce a successful final product, but we must develop these ideas in the midst of mayhem—and typically, we are responsible for organizing the chaos. Writers must be able to lay out a plan and stick to it. Everyone must be able to work together for the project to be successful.

What makes these working relationships run more smoothly? Business etiquette. In today's laid-back working environment, people have lost a lot of charisma. I'm sure you've witnessed (or experienced) poor customer service. Professionalism, however, is and always will be an "in" trend for those who want to succeed. People like and will pay for professional service. Be aware and be a professional. Take this short quiz to find out how you score on general business etiquette.

Etiquette Quiz

(*answers on right*)

1. While sitting with a client, your boss enters your office. Whom do you introduce first?
   a. your boss.
   b. your client.

2. A subordinate in another department leaves you a voice mail asking for the status of a project. You
   a. don't return the call; the employee has no right asking you for a status.
   b. call the employee back to answer his/her question.
   c. call the employee's supervisor to report the status.

3. When is the appropriate time to shake a client's hand?
   a. when you are first introduced.
   b. during the meeting.
   c. when you say goodbye.

4. When talking with a group of four, whom do you make eye contact with?
   a. look only at the person you are currently speaking to.
   b. don't focus on anyone's eyes.
   c. shift eye contact within the group.

5. Your phone rings while someone is in your office discussing work-related issues. You
   a. answer the call.
   b. let voice mail answer.
   c. ask the person in your office if it's OK to take the call.

Now let's relate these examples to other business situations. Think about how you would like to be treated, and practice your own rules. You not only gain the respect of clients, you will gain co-workers' respect, too. Our job is not only to develop the content for a marketing piece; our job is to understand people's needs internally for the client and externally for the consumer. We have to work and think for two (or more) types of people while maintaining our composure. As communicators, we deal with a variety of personality types, and sometimes it can be challenging to stay professional.

However tempting it is to violate the rules of etiquette to "get back" at an annoying customer or co-worker, we have to remember that the satisfaction is only temporary; the effect this behavior has on our professional image may last a lot longer. Keeping everyone happy is as close to impossible as possible, but keeping yourself happy *and* confident in your work translates into success. By learning from our failures and successes in dealing with people, we will develop a more professional and, consequently, more successful role as communicators.

Jennifer, a three-year STC member, is a communications specialist in business and marketing writing at a privately owned information technology company headquartered in Springfield, MA. When she's not serving as Impact!*'s associate production editor, Jennifer writes for a handful of publications to continue developing her marcom portfolio.*

QUIZ ANSWERS

1. b

2. b

3. a & c

4. c

5. b

Quiz questions and answers are the perspective from: http://www.jc.com/voice.

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society for technical communication

...Crash Course

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approach, and many noted that their approach differs with each project. In analyzing their responses, I discovered common techniques writers use to conquer the blank page. I call it **GV-TOW**:

1. *Get it out.* Write what you know, or think you know, in a random stream-of-consciousness style that does not restrict the flow of thoughts or ideas.

2. *Visualize it*. Group or chunk information into reasonable pieces. Do not discard information at this point, but start looking for the gaps, unanswered questions, or missing information.

3. *Talk about it.* Discuss your ideas with anyone who will listen: your client, SMEs, other writers, or members of your target audience. This is the research stage; find answers to remaining questions to fill in any holes. Determine what's most important to whom and why, helping establish the tone and mood of your piece.

4. *Organize it.* With a solid understanding of the project (including topic, audience, and purpose), identify the main message and the facts needed to support this message. Discard unnecessary or unrelated information. For some writers, a formal outline with a thesis, introduction, body, arguments, and a conclusion works well. For others, an outline mapping various components without actually developing copy is sufficient.

5. *Write it!* And re-write it! This is the stage at which many of us start, often resulting in rewrite after rewrite. Working through the first four steps equips us with the tools we need to make it through the actual writing stage successfully (including editing and revising). Reserve the right to flip back to other stages and rework ideas. Writing is a process of evolution. Our best work evolves into being.

Heather (hlm@campana.com), a technical and marcom writer from Waterloo Ontario, is a three-year member of STC. She works as the lead writer for GoldCare software, a division of Campana Systems, Inc. In her own time, she devours British and Canadian literature or takes to the wilds of the outdoors for hiking, camping, skiing, snowshoeing—anything really.