



Piecing Together Your Audience

BY SEAN HOWER, *Sacramento Chapter*

Technical writers live by the commandment “Know thy audience.” While the best approaches to fulfilling this commandment include conducting site visits and user surveys, we must often turn to other sources for information when deadlines loom or budgets are slashed. Individually, these resources provide anecdotal snapshots of users, but taken together they offer an understanding of our audience necessary for quality documentation.

Internal Sources

Internal sources offer a quick way to discover information about your audience. Many departments in your organi-

zation already have valuable data that hints at the personalities of your audience members, the nature of their work, and the ways they use the product or service you’re documenting. Internal sources of information include the following departments: marketing, sales, product design, development, training, consulting, project management, and customer service.

Marketing and Sales

The marketing and sales departments are good places to look for high-level information that can serve as a starting point for your own research. Both departments have market research

describing their “target” consumer. They may produce white papers that detail the needs of your audience and the ways your product or service meets those needs. White papers may discuss specific technical details you can use in your own documents. Marketing and sales departments may also produce case studies that include specific examples of customers using the product or service. Both white papers and case studies are good sources of information about the industry for which the product or service is made. From this information you can infer much about your audience, such as their general goals, responsibilities, and tasks.

Product Design and Development

The product design and development departments are good places to gather information about how your audience members use (or are supposed to use) the product or service for which you are writing. These departments may have developed personas that describe the ideal customers for whom the product or service is designed and use cases that detail how fictitious customers take advantage of the features the product or service provides. Requirements and specification documents may explain how customers are expected to use the product or service in their day-to-day activities.

Training, Consulting, Project Management, and Customer Service

These departments are your best internal sources for information about your audience members. Each department has direct contact with your audience and can therefore provide anecdotal, if not specific, information about the people using the product or service for which you are writing. These departments can describe the personalities of your audience members, the environments in which they work, their general knowledge and experience levels, the problems they face in their daily activities, and the ways they use, or don’t use, the product or service. They can also describe issues that your audience finds particularly difficult to grasp or too frustrating to deal with.

Project managers may have detailed

workflow or process diagrams you can use to understand how your product or service fits into the activities of your audience. In-house training sessions can make you a more knowledgeable writer and allow you to observe your audience using the product or service you're documenting.

Accessing Internal Sources

You will most likely find internal sources of information in two locations: In documents created by the various departments and in the heads of your co-workers. Tracking down documents and interviewing co-workers can be as time-consuming as site visits or other forms of audience analysis. Depending on your situation, you may have to access information informally: for example, during a lunch date or an over-the-cubicle-wall conversation. The best thing to do is to make friends with people in other departments. Most people are willing to talk shop and tell you about their hard work. Informal contacts give you a chance to swap business stories and pick up useful information in a casual setting: Because the people with whom you work know who you are, what you do, and why you're doing it, they may be more willing to help you when it comes time to interview subject matter experts, complete reviews, or implement changes.

While you're raiding internal sources for information, keep in mind that any information you uncover is tailored to meet the needs of the department that produced it. Documents from marketing and sales often describe the people to whom the company *wants* to sell a product or service and not necessarily the people who are actually using it. Translating marketing-speak can be a laborious task. Developers may be working with models of fictitious users that they themselves don't fully comprehend. Moreover, the identity and needs of users may shift depending on the developers with whom you are speaking and the feature on which they are working. The information you get from departments that have direct contact with your audience members will be based on individual experiences and will therefore be locked away in each person's head. You will have to spend not only your time but their time

to access that information. You may find yourself uncovering contradictory information or atypical situations that stick in the minds of your co-workers. It will be your task to make comparisons and decide which information is correct, or more nearly correct.

External Sources

While you're investigating internal sources of information, don't forget about external sources. External sources can provide a high-level understanding of both your audience and the professional field to which your audience belongs. You can infer, and even predict, the needs of your audience based on an understanding of what other members of the profession do. You will also learn about the industry for which you write, which will enhance your understanding of your own product or service and generally improve your documentation. The external resources discussed in this article are professional organizations, clubs, and publications.

Professional Organizations and Clubs

Professional organizations and clubs are communities of people who share the same profession or interests and often generate data about that interest, such as publications, discussions, and even training materials. Such information can suggest how your audience members work and what they expect of your product. Professional communities can put you in direct contact with the types of people who would be using your product or service, if not with your actual audience members. If you join one of these communities, you will achieve an understanding of your audience that you can't get from site visits. Some companies unwilling to pay to let you conduct a site visit may be willing to pay for a membership to a professional organization.

Publications

Books and magazines about the subject for which you are writing are a valuable source of information about your audience members and their work. Publications will help you learn their goals and how they go about accomplishing those goals; they can also provide valuable background information about the history and

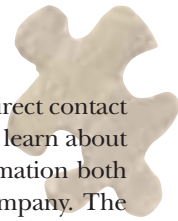
direction of a profession and teach you technical details necessary to write competently about it. Magazines and journals may also have reviews of your product or service that can help you refine your documentation to address specific issues.

Accessing External Resources

The Internet is your best bet for finding external resources. You can locate Web sites for clubs and organizations, as well as personal or professional sites maintained by industry practitioners. Schools may provide helpful information, or even free books, that discuss and teach specific aspects of a profession. Many journals and magazines have Web archives you can access either for free or for a small fee. You can also join newsgroups or discussion groups that can put you in contact with the kinds of people most likely to use your product or service. These resources may not provide specific data about your audience, but you can glean a certain level of understanding from them. Your documentation will also improve as a result of your efforts.

Because of the amount of information out there, it's important to evaluate Internet resources for accuracy and timeliness. Make sure you are getting information from an official or at least reliable source. Judge the validity of anything you read, especially in public forums where people often mix fact with opinion.

Creative Scavenging

When you can't get into direct contact with your users, you can still learn about them from sources of information both within and outside your company. The sources of information presented in this article are useful not just for those times when you can't conduct site visits and user surveys. They also complement more formal research. In the quest to "Know thy audience," there's nothing wrong with a little creative scavenging to get the information you need. 

Sean Hower is a technical writer, husband, and father with a passion for writing and teaching. He maintains a Web site for writers at hokum.freehomepage.com. You can reach him by e-mail at hokumhome@freehomepage.com.