

CHANGING TIMES, CHANGING STYLE GUIDES

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Jennifer O'Neill is a senior technical writer based in Brussels, Belgium. She has worked with technical publications for 17 years. O'Neill has a Master's degree in science in ergonomics and a background in usability. Prior to working with technical publications, she worked as an ergonomist in the United Kingdom and France evaluating the usability of buildings. It was during that work that O'Neill first became involved with building security and encountered the documentation that accompanies security products. O'Neill currently works for a U.S. multinational corporation that

manufactures security products, such as closed-circuit televisions, for a global market. Canadian-born Irish, she speaks English as her mother tongue and is fluent in French. She has worked in three countries: the United Kingdom, France, and Belgium.

CHAPTER SYNOPSIS

Based on the writer's personal experience, this is a story about change, change that occurred against the backdrop of the global economy, change that rose out of the need for companies to stay fiercely competitive in the global market. As European and American companies went through mergers and acquisitions, publication units were relocated and restructured, and style guides had to be created, re-created, merged, and only to be abandoned. This story illustrates how a group of European technical communicators try to adapt to these changes and produce quality documentation for the global market. However, as various moves and false moves were made, the demands of some regions and markets

rose to the top, while the needs and concerns of others fell by the wayside. Debates and discontent broke out, and compromises as well as one-sided decisions were made. Through it all, we learn the challenges faced by European writers trying to produce, on tight budgets, documents for a regional market that operates in 20 languages. We understand their frustration trying to educate American writers and editors on how to write for translation and localization. And, probably most importantly, we are asked to accept the necessity and reality of change.

The times they are a-changing.

—Bob Dylan, 1964

In January 2007, three heating and ventilation manufacturing companies, two located in the United States and one in Europe, merged to create a global company. Their joint product base now included heating, ventilation and air conditioning (HVAC) units, boilers, pumps, fans, filters, refrigeration, solar panels as well as more software driven services such as energy management and building automation systems. The merger made sense as all three companies wanted to expand their global reach in an increasingly competitive marketplace. It would help jump-start long-term growth because each company brought business, technology, and market strengths to the table that complemented each other.

The two U.S. companies mainly operated in the North American market, although one had started to expand into Latin America and had small but growing sales offices in Mexico and Brazil. The European company operated across Europe, the Middle East and Africa (EMEA). From now on, all three companies would be known as Shannon Global Facilities, Inc. (all company and character names used are pseudonyms).

TECHNICAL WRITING TEAMS

The two U.S. companies both had a technical publications department, located, respectively, at their R&D sites in California and Arizona. Collectively they had nine writers, one editor, and two documentation managers.

The California writing team was based in Oakland, California. As a result of the merger, this R&D and administration site was now to become the global headquarters of Shannon Global Facilities, Inc. The writers were managed by Nancy Sherbakov. Her technical publications department had five writers and an editor. Nancy had a long career as a writer and editor, working in several sectors such as telecoms, financial and equipment manufacturing. She had been managing this department for the last five years. Zac Browning managed the Arizona technical publications department. He had built his team over the last seven years, growing it from just two writers attached to engineering to a technical publications department with four writers and himself as the manager.

The European company involved in the merger had four writers located in three

countries—France, the Netherlands and Hungary—to accommodate the company's R&D sites in Maastricht, the Netherlands; Budapest, Hungary; and its headquarters in Lyon, France.

The European writer based in Lyon, France, was Sara Mitchell. She was English and had moved to Paris after graduating in French over 12 years ago. She had joined her current company six years ago from Paris as a senior technical writer. The move to Lyon had initially been a big social change for Sara, but now it was her home. It was the gastronomic capital of France and let her explore her love of cooking. It was also cheaper than Paris to visit restaurants renowned for their cuisine.

Sara's technical writing colleagues in Maastricht, the Netherlands, had also been moved around. Dirk was Dutch but was born in Surinam. His family returned to the Netherlands when he was nine years old. He lived over the border in Antwerp, Belgium, for a couple of years after graduating in journalism and then in Madrid, Spain, for a few years before moving back to the Netherlands. He had excellent English, was also fluent in German and Spanish and had reasonable French.

The other "Dutch" colleague was Sonia, who had been with the company for two years. Sonia was actually Scottish and had an IT background. She had a wanderlust spirit. So far, she had worked in five countries (England, Germany, Italy, France and now the Netherlands), usually as a contractor. Technical writing as a career gave her the flexibility to move around Europe for work. Sonia was fluent in German, had reasonable Dutch, and had some Italian.

Gabor at the Budapest, Hungary, office was Hungarian and had never lived outside his country. He was a young kid when the Wall fell in 1989 so he had learned English in school but had some knowledge of Russian. He had moved from technical support in the company to become a technical writer three years ago.

The European company had decided several years earlier that they would use U.S. English in all English language communications. So despite their diverse backgrounds, the European writers wrote in U.S. English. Their writings included installation, configuration, and inspection manuals for installers (which averaged around 80 pages) as well as a few end-user guides. The European writers also oversaw the localization of the manuals each had written, so they worked closely with the translation agencies and the sales offices across EMEA.

Now part of the EMEA division of Shannon Global Facilities, the European writers operated in 20 languages across the EMEA region. However, it was too expensive to translate the manuals into all these languages to meet customer needs, so languages were prioritized, depending on the product and its market. The average number of languages in a translation project was 12 (with an upward trend). They were paid for from the central translation budget managed from the Lyon headquarters. The demands of localization meant that the European writers were kept continually alert to the costs of getting their work to market in all the required languages.

PROBLEMS IN U.S. MANUALS

Shortly after the merger, Shannon Global Facilities started their efforts to sell in the EMEA market those products that were previously only available in North America.

In May 2007, Sara was told by the EMEA product management team that as part of her tasks she would now also be overseeing the localization of U.S. manuals and energy management and building automation system software for the EMEA market. They told her that the United States had previously only translated a few short manuals, which was done by the Mexican and Brazilian sales offices. The U.S. staff had not yet used the services of a translation agency as their sales offices translated for free. As Europe already had several years' experience working with many languages, the United States would now also send their work to them to be translated for products sold in EMEA. The EMEA business would pay the cost of these translations.

That same month, Sara started to receive the source files of manuals from the documentation managers in the United States. The manuals varied between 40 and 120 pages and all were done in Microsoft Word. As she began to check the U.S. manuals for potential localization issues, Sara quickly realized that there were three main problems: (1) the manuals lacked global branding; (2) they followed conflicting style guides; and (3) they had not been created with translation in mind.

Although Shannon Global Facilities had by now existed for over five months, the company still didn't have a single corporate branding identity. Marketing was working on it, but it probably wouldn't be finalized for at least a few more months. Sara needed to get these manuals out the door in multiple languages as soon as possible. However, she was faced with manuals that had been branded prior to the merger with multiple branding identities. The company names and logos were different from those used in EMEA and had different fonts, cover designs, and colors.

In North America, there were sales teams for each business group (HVAC, renewable energy, and energy management), and each group had its own branding. The U.S. technical writing teams expected Sara to keep their branding in the translated manuals until the new corporate branding was released. However, in EMEA, the sales teams in each country sold all products (as it wasn't practical to have three separate sales teams in each of the 30 countries), so one common branding identity was used for the whole region. The EMEA product management wanted Sara to convert the U.S. manuals to the EMEA branding until there was a common global one. They were adamant that they didn't want a kaleidoscope of brandings released in the EMEA market before the global branding appeared, particularly as some of the American brandings meant nothing to EMEA customers.

Looking at the source manuals from the two U.S. companies and comparing them with the European manuals, Sara also noticed that each group's manuals followed different style guides. For instance, there were many ways of saying the same thing and terminology differed. These inconsistencies, Sara thought to herself, would have an impact on cost. Their translation budgets were never large enough to meet demand and their managers were always chasing her and her colleagues to control cost. Her company usually paid a lower price for translation agencies to translate identical, or nearly identical, texts. But all these differences in writing meant lower reuse of content and higher translation costs. Ouch!

Another problem she faced was that the U.S. manuals had not been written for localization. There were no allowances for the impact of text expansion that so often comes with translation. The U.S. manuals frequently used forced page breaks to position paragraphs nicely on the page, which would affect the layout of translated

documents. One documentation group often placed sections inside text boxes, which meant that when translated, the content would expand out of sight in the text box and the box size must be manually adjusted. The manuals did not contain metric measurements, numbers lacked a leading zero, the contact information was U.S.-only contact, and so on, all causing more work for her and the translation agency—and, again, more time and cost.

The biggest problem of all was about the graphics. Most of the graphics had embedded text.

A big nuisance, Sara thought to herself as she sat back in her chair. Sara needed these manuals in 10 languages. If all source graphics are sent to the translation agency, for every graphic, each language will be placed in a separate layer in the graphic file. To insert the translated text in a graphic could take around 10 minutes per language. That's 1 hour 40 minutes per graphic. The agency charges 30 euros (\$44) an hour for such work—not including the actual translation, but that's minimal—so this single graphic will cost 50 euros (\$73) to put into 10 languages. If the manual has 10 graphics requiring similar work, it could cost 16.7 hours and 500 euros (\$731). This graphic-related work could easily account for 3 to 5 percent of the total translation cost of a manual and delay its release. Although 3 to 5 percent can seem a small share, do several manuals and these extra costs and time delay would accumulate. With tight translation budgets and deadlines, such extra costs and delays are unwelcome and need to be avoided.

To avoid these costs and delays, Sara had to modify these graphics first. Many graphics, Sara noticed, were simply jpeg files, which meant she had to go looking for the source graphics first. She then needed to add numbered callouts to the graphics and place the associated text under the graphics. Although the text could be directly placed in text boxes over or around the graphic in Word, translation agencies strongly disliked this practice. It ran the risk of the text being accidentally omitted in translation (translators don't work directly in the Word file but in a translation memory tool). The box could also move around on the page due to text expansion so it could need to be manually repositioned.

She sent an e-mail to the U.S. documentation managers explaining that she had to rework their manuals due to differences in branding and concerns with translation. Although the U.S. teams were annoyed that their branding had been changed, they admitted they didn't realize that products could be sold differently in regional markets outside of North America and that this could impact manuals. They also acknowledged they had never had to consider the issue of translation and the cost involved until now.

COMMON STYLE GUIDE AND TEMPLATES

In the teleconferences that followed between the U.S. and European writers over the next number of weeks, everyone agreed that it was important that all the manuals looked the same and were written consistently. There should be a common style guide and templates. This became possible in September when marketing finally released the new branding guidelines and corporate logos for everyone to use worldwide.

In November 2007, Sara and Sonia from the Dutch office went to the United States to meet their American colleagues and start the work on building the shared style guide and templates. It was time to put faces to names and voices.

The meeting lasted two days at the company headquarters and R&D center in Oakland, California. Nancy Sherbakov, the documentation manager, welcomed Sara and Sonia. Since the merger, Nancy had become the main person of contact between the European writers and their U.S. counterparts.

One of the first things Sara and Sonia noticed was that everyone in Oakland worked in cubicles, whereas the company's European offices were all open plan, usually based around teams. Chatting with their U.S. colleagues, Sara and Sonia admitted that they didn't fancy working in the isolation of a cubicle. However, their U.S. colleagues hated the idea of an open plan as they would consider it too distracting. "*Chacun son truc* [Each to his own]," shrugged Sara.

Then there was the language. It was the first time in years that Sara and Sonia had attended a meeting where everyone's mother-tongue was English. They were the only foreigners. All conversation was in English only. "Gosh," thought Sara, "it's a bit weird not hearing chat in other languages." Where she worked at the EMEA headquarters, there were perhaps up to seven or eight nationalities and you could hear four or five languages spoken between colleagues. In her department of five people, each of them was a different nationality (French, English, German, Danish and Swiss) and chatted in up to three languages (French, English and German). She'd never worked in a monolingual environment. None of her U.S. colleagues were fluent in a second language. "But then," she thought, "most British people aren't either." The "Anglo Saxons" are renowned for being monolingual.

Once everybody had introduced themselves at the meeting, Nancy updated everyone on the company restructuring, which had been quickly gathering pace. They were in the process of merging the two U.S. technical publications departments. Because of product consolidation, there would be two fewer U.S. writers. Two writers were relocating from Arizona so all U.S. writers would now be based at Oakland. Zac, the Arizona documentation manager, had been let go and Nancy was now the sole documentation manager. Nancy's editor had left the company to pursue interests elsewhere, so she had hired a new editor, Peter, who came from the telecoms sector. Altogether, there would now be seven writers in the United States plus Nancy as manager and Peter as editor (an overall change from 12 to 9 people). These changes didn't impact the four European writers, who would continue to report to their local managers.

THANKS FOR NOT TELLING US

Peter then took the stage to explain his documentation plans for the group. They were going to move to Adobe FrameMaker® and get away from Microsoft Word. He'd been evaluating the different document types his group wrote and had started working on several templates.

What? A new tool?

Sara and Sonia sat stunned. This was the first they had heard of a tool change.

They assumed that such a fundamental change would be discussed as a group beforehand. They asked why this decision hadn't been debated. Peter replied that Frame was a superior tool to Word and suited the company's needs better.

"But what about the needs of other regional markets besides North America? Were we considered? No one asked us anything about the potential issues of changing tools," said Sonia.

Peter replied that there were no problems with translation when using Frame. Sara agreed. Translation agencies preferred Frame over Word. However, that wasn't the issue (besides not having been told beforehand of such a fundamental decision). Sonia and Sara explained to the group that Europe used Word as they had to share the source Word files of manuals with their sales offices and large customers, the distributors. Although Europe spent around 280,000 euros (about \$410,000) a year on translating technical documentation across all product groups, it wasn't enough to meet all needs. The sales offices in countries with smaller markets often had to translate manuals themselves as the only way to get their local languages. And they used Word. The writers also shared source files with distributors who rebranded and customized the files themselves, often in languages that no one knew in-house. They, too, used Word. With the tool change, who was going to get all the files from Frame into Word?

"Bottom line," Sonia said, "we need to be able to share source files with internal and external customers across multiple languages. Why weren't we involved in this decision to change tools?"

Peter seemed somewhat annoyed by this unexpected turn of events. He hadn't expected these European business requirements nor did he realize the size of their translation budget. He also wasn't happy that they were sharing source files with third parties. He also began to realize, however, that he had no say on the file sharing. It was a regional management decision. In his previous job, he hadn't needed to consider whether regional markets worldwide operated differently in the company—it wasn't an issue. This company apparently operated differently from his previous one. Reluctantly, Peter accepted that the European writers would stay with Word while the U.S. writers would move to FrameMaker. Because Sara localized U.S. manuals, she had to use FrameMaker as well. Peter now would have to do Word templates, which he wasn't thrilled about. Sonia and Sara were never given a reason by Peter or Nancy as to why they hadn't been involved in the decision-making process. For the U.S. team, writing and translation were apparently two distinct and separate entities that didn't touch. At least this meeting should change that outlook.

For the development of the style guide, everyone agreed that it would be a collaborative effort and that it would include guidelines on writing for translation and issues of internationalization and localization. It was agreed that Peter would write a table of contents for the proposed new guide and distribute it to the team who attended the meeting for review. Work would then start on it.

RETURN FLIGHT HOME

After checking in at the airport to fly home, Sonia and Sara slowly meandered to their departure gates. Sonia walked up to a coffee shop and looked at Sara, "I'm get-

ting a coffee. Tea for you? Oops, I must remember to ask for hot tea or you'll get iced tea!"

"Hot tea is perfect and no milk," replied Sara. "I've now the French habit of drinking it without milk. Very un-British, I know."

Sonia ordered the hot drinks and looked around for a free table in the fast-food area. "Let's sit here," she said pointing to a table that overlooked the shopping and food area of the airport. They dumped their bags on the floor and sat down.

Sara spotted a newsstand in the shopping area. "I've still to buy magazines to bring back with me. English language magazines are so much cheaper here than Lyon and there's a fantastic choice. Got a stack of paperbacks in that bookstore near the hotel."

"Me too. The extra kilos didn't cause any problems checking in."

Relaxing back in her chair, Sara reflected on the events of the last couple of days. "In spite of the 'surprises,' we had an interesting gathering. Everyone's excited about the new global doc standards. Was taken aback over Frame, though. No discussion."

"I don't think the tool selection was a We decision. We effectively walked into a meeting with some fundamental decisions already taken and off the table. Nice of them to say nothing to us about it beforehand. Made us seem somewhat secondary to their focus."

"Yeah," sighed Sara. "Peter seemed to have already decided a chunk of stuff before we arrived. Was a bit surprised to say the least that he's already started working on Frame templates."

"Yep. Our market needs were somewhat incidental to Peter's plans. Europe is responsible for translation and carries the cost—a significant cost—yet he never asked us a thing beforehand."

Sara laughed. "Do we exist in their working life as we don't report to them? Seriously, now he knows more about our regional situation in Europe...Yet he was, well," Sara said, placing the coffee spoon to her lips as she considered her words, "more focused on U.S. needs. I'm still not sure what 'global' means to him. Our market is outside his scope of experience. But he should have got the picture over the last couple of days that we're a more complicated market with our 20 languages and 30 countries."

"Sure hope so. We have to be included. It shouldn't matter that we don't report to them in Oakland. We're all focused on documentation."

They both sat silently for some moments, contemplating and watching the life of a busy international airport go past.

"He certainly didn't seem very enamored by Word...," Sonia said to no one in particular. "I think it annoyed him that we must stay with Word in Europe. We have no choice. We must be able to share source files with our internal and external stakeholders. Our 'world' isn't just Tech Pubs." She gestured quotation marks around "world." "We work closely with Sales and Tech Support too as well as distributors across a lot of countries."

Sara contemplated what awaited her: "I foresee problems with many of the smaller countries. I don't yet know how to get them the Frame docs in Word so that they can translate locally themselves. My instinct says it'll be a lot of work, which I

don't have time or resources to handle. How do you tell the Finnish or Czech sales offices or whoever that they can't have the source files to translate themselves in Word and I don't have the budget to do it centrally? And most of their customers don't speak English. They're in a bit of a Catch 22 situation. They're pushed hard by management to grow their markets but we can't provide them with translated manuals due to the lack of a budget. So they're stuck to do it locally until they reach that critical business volume where a translation budget is allocated by management and we can then take over the translations." She shook her head and sighed.

Sonia laughed, "Oh, the look of horror on Peter and Nancy's faces when they learned that we give source files to customers. But they'd no answer on how to customize docs for distributors when you don't know the language. And it's all blessed by Legal."

"A thought just crossed my mind."

"Sounds ominous."

Sara sat forward, "When Thierry, my boss, told me that I'd now be localizing the U.S. manuals, he mentioned that the Mexican and Brazilian sales offices were doing some local translations themselves but they had no translation budget. Peter and Nancy never mentioned Latin America. What's going to happen with them? My understanding is that the company also wants to expand into these emerging markets."

They looked at each other in silence.

"OK, work on a global style guide that incorporates international issues is now ready for takeoff," Sara said. "There are already some skid marks on the runway, it's true, but...."

"Houston we have lift off!" Sonia finished. They clinked their paper cups together.

BETRAYAL

During the two months that followed the meeting, Sara and Sonia heard nothing from Peter about the table of contents for the style guide. Nancy had said he was busy on it. When Sonia asked her how it could take an editor many weeks to do a table of contents, Nancy didn't elaborate. Odd.

After two months of silence, they and the rest of the editorial group received an e-mail from Peter—with an attachment. It was a 150-page style guide and several Frame templates!

The European technical writers were stunned. What happened to the agreements made at the U.S. meeting? They had been expecting a table of contents for discussion, not what seemed to be a completed style guide where any discussion would apparently just be tweaks. But what left the Europeans speechless were a couple of sentences he had written in the end of the Introduction: "International issues are not considered. They will be added at a later date."

European management had not spent thousands of euros sending two senior writers to the U.S. to explain the importance of writing for an international audience and the issue of localization in order to get this statement!

Sara and Sonia felt betrayed. After a meeting between Sara, Sonia, and the

EMEA engineering and product management leaders, Sara sent the U.S. editorial team an e-mail, a very long one, on behalf of the European team explaining why they could not accept this style guide.

From: Sara Mitchell
 To: Peter Smith
 CC: Sonia Cummins, Thierry Thévenot, Dirk van de Woestijne, Nancy Sherbakov
 Sent: Thursday 22 January 2008 15:35
 Subject: Draft style guide—European feedback

Peter,

Thanks for sending us the proposed style guide and templates. You and your team have put a lot of work into them.

We were surprised and disappointed to receive such a complete and long guide. At the meeting two months ago in Oakland, it was agreed as a group that you would initially send a table of contents to the editorial team for discussion. We never received such a document in Europe nor were told that you had started work on the guide with your team in the United States.

Adding to this discontent, we feel our concerns on translation and localization have not been properly addressed although during the meeting we discussed the problems we're currently having and proposed solutions and best practices. You all agreed that it was important to include them in the style guide. It was also acknowledged that although the U.S. team didn't have much experience in internationalization and localization, the European team did. By working together we would share knowledge and experiences. This agreement now seems to have been ignored.

Unfortunately the European team cannot accept the current draft style guide because of the lack of international perspectives. Some examples of the issues we have with it are

Focus on the U.S. market only

The guide is written with the U.S. market only in mind. The brief meeting in the United States was for a global style guide. Yet the templates only list North American contact details. The other regions (EMEA and Latin America) do have their own contact details but they are absent. Customers based outside of North America are only provided with an international phone number in the United States to call.

In the U.S. manuals we have received to date for localization, only imperial measurements have been used. There is insufficient mention on the usage of metric in this style guide.

Incomplete terminology list locked in the style guide

We need an extensive terminology list of the terms we use in our

documentation and software to help standardize the company terminology. The list needs to include descriptions of the terms as well as incorrect terms that should not be used. We must be able to share terminology. Placing it in the style guide limits access to just technical writers. This list must also be available to a wider audience such as engineering, marketing, sales offices and translators.

Too long and difficult to share

The guide is too long and reads more like a tutorial. We have a wider audience for this information than perhaps you may have in the United States. As explained, we share our source files with other groups and companies such as technical support, engineering, sales offices and distributors. Some of the information in the guide is useful to them but we feel that they are unlikely to read a 150-page guide. A shorter guide with separate stand-alone modules would suit us better. For example, we recently produced a short guide standardizing how to write metric measurements in technical specifications. It was well received in Europe and we'd like to see it included in the style guide.

Inadequate localization guidelines on handling graphics

A frequently encountered problem with manuals received from the United States is that of text associated with graphics. The guide says nothing about the problems related to embedding text in graphics, for example. We are not prepared to pay the extra translating charges incurred with embedded text as such costs are easy to prevent.

The guide also says little about the impact of text expansion that follows translation. FrameMaker allows writers to place text boxes on graphics in the document (so no need to embed text in the graphic) yet often writers are placing too much text around a graphic, which then swamps a graphic when it is translated. Call-out lines are often placed too close together to accommodate translation. All these issues were discussed with you at the meeting. There must be guidelines on how to handle them.

Inefficient use of space in templates

The templates are excessive in page count. There's too much redundant white space such as heading levels starting by default on the next page and the excessive paragraph spacing around headings. The manuals of many of our products are printed in multiple languages, not just English, so printing costs matter to us. These excess pages increase the cost of printing, whether by us when shipping printed manuals with products or by our customers who receive PDFs and must print the manuals themselves. We need the layout to be tightened up.

Incorrect use of safety icons

The internationally recognized safety icons for Cautions, Warnings and Danger are incorrectly used in the templates. The IEC/ISO safety symbols have precise meanings. You've allocated different functions to them. This is totally unacceptable. You've used the Radioactive icon, for example, to identify all Danger notices in our manuals. None of our products is radioactive. The radioactive symbol must be removed immediately. You've also used the Electrical hazard symbol to identify all Warnings. Again this is incorrect. These safety symbols identify the type of hazard, not the level as you have done. The level of risk is indicated by the words "Caution," "Warning" and "Danger." Color can also be used to identify the level of risk. Our Legal department agrees with our concerns on this incorrect usage.

We need to discuss our issues with the guide so that they can be rectified and an international perspective integrated into it before the guide is formally released.

Cheers,
Sara
Senior Technical Writer

Over the next month several e-mails were exchanged between the U.S. and European members of the editorial team about Europe's concerns with the "global" style guide. Nancy held one teleconference during which Peter explained that in order to speed up the release of the style guide and templates, he and Nancy had decided to first release for the United States only and that "ROW [Rest of World] can do [your] own thing. Over time we'll merge."

So the meeting in Oakland where everyone agreed to a style guide that encompassed global issues was just a charade? The question about why they had never discussed this U.S.-only development with their European colleagues just drew silence.

REWORKING THE "GLOBAL" STYLE GUIDE

Sara and Sonia, with the support of their management, would not agree to an initial U.S.-only style guide. The approach didn't make sense/cents. The manuals written by the American writers were now being used internationally and translated. The European writers should be able to advise on international issues in the style guide. During the teleconference, Nancy agreed to set up a four-person editorial team to modify the style guide to include translation and localization issues. The team would include Peter and a senior writer from the United States, Richard, as well as Sara and Sonia from Europe.

Clearly there were expectation problems between the U.S. and European writ-

ing teams. The United States was keen to release the new style guide as soon as possible even if it applied to the United States only while Europe wanted this guide to also encompass international issues as everyone was now working for an international market and it was important to write the manuals for it to help control costs and improve time to market. The expertise to do such a guide existed in-house even if perhaps not in Oakland. A new style guide was a perfect opportunity to include international issues. The nine-hour time difference between Europe and California also hampered communication. Compounding this, Sara and Sonia tended to come into work earlier than most colleagues to avoid traffic congestion while Peter tended to arrive later at the office for the same reason. These habits simply widened the gap between them all. There would have to be another face-to-face meeting.

Sara and Sonia both felt that this second face-to-face meeting would be an excellent opportunity for Peter and Richard to come to Europe as neither had ever been outside of their country. Perhaps the fact that they had never traveled overseas might be part of the problem: "ROW" can seem too abstract and secondary from afar. Peter and Richard loved the idea of visiting Europe!

Unfortunately, the U.S. management said no to them traveling—no budget. So Sara and Sonia would go to the United States, again—European management considered this global project important. EMEA needed documents that were internationalized and easy and cost effective to translate.

Everyone was disappointed that the Americans could not come to Europe. Sonia thought it bizarre that Nancy, as documentation manager, now had "global" in her job title but had no passport or travel budget. "There's a potential credibility problem," she thought. In Europe most people have a passport. True, countries are much smaller in size than the United States so it's easy to cross borders. It is common for people living in the south of the Netherlands, for example, to go shopping in the large supermarkets in Germany. Prices are cheaper and it's the same currency.

In April, 2008, the editorial team met for three days in Oakland again to update the style guide. They had to put aside any feelings of mistrust and agree on what to include as Nancy had given them a rigid deadline: Official release of the "Global Style Guide" and templates would be the first of June, just six weeks away.

For Sara, her focus was on the biggest problem encountered: graphics. The U.S.-focused style guide had only a short chapter on handling graphics. It wasn't enough for such an important topic. When she had contacted the U.S. writers with whom she worked, they would invariably say they had no time to do what she requested or that they didn't agree with numbered callouts: They weren't user friendly. The cost impact wasn't their problem. There was also a cultural issue with using numbered callouts. European readers are probably much more used to seeing them in documents than U.S. readers. The problem then became clear: The U.S. writer is now writing for an international audience and the cost issues of going global cannot be ignored.

To push the graphics issue, Sara brought a draft of the proposed graphics chapter which included the information she needed and showed good and poor practice. Some of her suggestions were

1. Do not create or add callout lines to graphics in the documentation tool itself as they can move around on the page during translation and must be manually repositioned. Use graphics tools for graphics. Too often writers were doing shortcuts by drawing lines or boxes on graphics in Frame and Word.
2. Plan for text expansion when allocating space for text and positioning the callout lines.
3. Use numbered callouts instead of text callouts when there are several items or the items have many words to allow for text expansion in translation.
4. Do not embed text that needs to be translated (measurements, however, could be included in a graphic such as “1 in./25 mm” as they are rarely translated).

Sonia also brought the guidelines on writing metric measurements, planning to propose that they be included in the style guide. The guidelines covered such topics as capitalization, decimal places, dates, greater than and less than, multiplication sign, percent, range of values, weight, and SI units of measurement (Système International d’Unites, the metric system). Some examples from the guidelines were

1. Use SI units. Convert any measurements written in the Imperial/U.S. system to its metric equivalent. In documents created in the United States, use Imperial/U.S. measurements with the metric measurements in parentheses. Translators are not expected to do the conversion.
2. Don’t use any decimal places when writing dimensions in millimeters. None of our products require this level of accuracy. Problems of excess accuracy usually arise from converting Imperial or U.S. measurements to metric.
3. Don’t use the @ character as an abbreviation for “at” as it often cannot be translated.
4. Values less than 1 kg should be written in grams.

The two-day meeting went well. Being face to face certainly made discussion much easier and it was easy to show, even quickly draw up, particular points as questions came up. Using PowerPoint in a webinar didn’t allow the same spontaneity. As they got to know each other better, it also became easier for the two sides (the United States and Europe) to make compromises without feeling that something important had been surrendered on bad terms. They also learned much about how the two regions worked and got a better understanding of why differences existed. A lot of ground was covered in those two days!

THE LAUNCH . . . AND THE UNEXPECTED

After the two-day meeting, Peter began working on implementing all the agreed changes to the style guide. He had a month to update the—now-global—style guide. Sara and Sonia would be returning to the United States for the launch of the global style guide in June, and it was agreed that both would give presentations to the

group on how to write for the international market and how to do graphics for translation.

And then the bombshell hit. On May 6, 2008, Shannon Global Facilities Inc. announced that it had acquired one of their largest competitors, Reynolds Energy Inc., a manufacturer of HVAC systems as well as refrigeration, air treatment, dust collectors, filters and fans.

Nancy sent an e-mail to all the writing teams worldwide with the news, describing the newly acquired technical writing team. Reynolds Energy's technical writing department was based in Dallas, Texas. They had six technical writers, an editor and a documentation manager, all located on one site. Nancy confirmed that they would be sending their editor, Steve, and two writers to the official launch in Oakland in June to meet everyone and hear about the global project.

A global launch planned for one team was now being made for two. What would the new team make of it?

MAASTRICHT, JUNE 2008

Sonia dumped her backpack on the desk, took her coat off and shook the rain off it, "I'm back from the sunny, dry lands of California."

Dirk was sitting at his desk, located a few meters away from Sonia's. "Welcome back. How was the trip? You missed some really wet weather while you were away."

"It was a long flight back due to the stopover. I still feel some jet lag. It's amazing how much one can spend while waiting for hours in an airport. Did I really spend that much on coffee?"

"You can claim it back in expenses. How did the global release go?" Dirk asked eagerly.

"The guide was well received and no one said anything about the release date being delayed due to us 'cranky' Europeans always complaining about the original guide being unsuitable for our international needs."

"What did the Reynolds team think of the guide? What were they like?" asked Dirk.

"They were charming. They don't translate anything at present. They will probably do so at some stage."

Sonia had by now turned on her laptop and was downloading the latest e-mails. "We discussed the languages we do in EMEA and working with our translation vendor. It's all a new world to them. They don't develop too much software. For the moment they've no idea about translation and localization. They have more questions than answers."

"What was their impression of the global style guide? Will they use it? I'm still not convinced we need 150 pages that at times reads like a training course in technical writing but that's what we got." Dirk sounded somewhat frustrated.

Sonia shook her head, "Nope. They'll be sticking to their own style guide and Word templates. They use Word. So that means we've now two different sets of Word templates following different style guides as well as the Frame templates. But

they've agreed in principle with having the same documentation standards world-wide across the company. Getting there will be another story if our experiences are anything to go by."

Dirk stood up from his chair, "Coffee? This one's free, from the Shannon coffee machine. So what's the next step?"

"I'll wait till you get back with that coffee. I'll unpack the docs I brought back."

A few minutes later Dirk was back. He placed an espresso on Sonia's desk, together with a couple of sugar cubes. Sitting back in his chair, he looked expectantly at Sonia, "Well?"

"So the editorial work on the global style guide now restarts to integrate the Shannon and Reynolds guides and templates. The goal is that the two style guides should more or less provide the same information. Let's see what happens with the templates as they are very different. There'll be a three-person editorial team this time: the editors from Shannon and Reynolds and then an international representative, which would be one of us in Europe. But I won't be taking part. It's just too time consuming on top of all deadlines I have to meet."

Dirk shook his head, "I have no interest helping out on the global style guide either. The editorial teleconferences are held biweekly at 18:00, but I must leave work at 17:00 to pick up my daughter from the crèche and so can't attend. A lot of the work is done outside of our work hours."

"Is Reynolds interested in international issues?" Dirk continued.

"Seem to be. The editor of the new group, Steve, was interested in what Sara and I had to say. During the Q and A of my presentation on writing internationalized documents he made an interesting comment," said Sonia. "I had given examples of issues we've had with docs not being written for translation and the impact it can subsequently have on the cost. He said that it was not the job of technical writers to get involved with cost issues. I was gob smacked!" Sonia made an "amazed" look at Dirk.

Dirk just laughed, "He said that? As soon as they start translating, they'll change. And their managers will insist in cost control too, just like ours. The English source document is where planning for localization starts. They'll get money conscious."

Sonia laughed too, "He doesn't work in a regional market with 20 languages and a tight budget. I told him that once his group starts localization, the cost issues will rapidly climb up his priority list."

"So what's next?"

"Sara and I now need to do a write up for our managers on the visit. The overall summary would be that we had a successful launch of the global style guide and now it restarts all over again due to the acquisition." Groan.

WORK STARTS, AGAIN, ON THE STYLE GUIDE

In September 2008, the new three-person editorial team started work on integrating the two groups' style guides. Peter represented the "global style guide" and Steve the "Reynolds Energy style guide." Gabor in Budapest was now the "international representative." He was delighted to be representing his colleagues in Europe.

They held biweekly teleconferences to discuss each section of Peter's style

guide, compared them to the equivalent in Steve's guide and then tried to reach agreement on common guidelines. They issued minutes so everyone was kept updated and could provide feedback to their teams.

With 150 pages, there were many sections to consider. This was not going to be a short review process, Gabor realized. And he faced an unexpected complication. He was familiar with Peter's voice from occasional teleconferences that were held by Nancy with all the writers. But prior to these teleconferences, Gabor had not heard Steve speak, and Steve's accent came as a shock! Gabor found it strong and indistinct. It was initially difficult to understand everything that he said. Speaking on the phone further reduced clarity and he had no visual cues to help with the comprehension. What's worse, the economic situation had hardened and business travel was now frozen, so there was no money for Gabor to go to the United States and meet the others face to face.

Gabor didn't have the courage to tell Steve that he found his Texan accent difficult. He felt that if he said anything about the issue, Steve and Peter would question his English skills and his role as a writer. Although Gabor's English was good, he felt self-conscious, in the presence of two editors, that English wasn't his mother tongue. Gabor didn't say anything about this to his European colleagues either as he didn't want them thinking he might be letting them down.

So for the first few teleconferences Gabor didn't contribute much. He relied on Peter's input to try to follow the discussion. Gradually his ear grew accustomed to Steve's accent and his confidence and contribution to the discussion increased.

Slowly, bit by bit, the team tried to reach consensus (or make compromise) on the various items in the two style guides.

Waiting for her laptop to download some latest software updates, Sara read the minutes from the mid-February editorial meeting sent by Gabor. Progress seemed slow. The differences between the guides and templates still seemed distinct. It was hard to believe sometimes that both guides complied with the same corporate branding guidelines. They both used the approved fonts, although one guide opted for sans serif only in manuals and the other guide for sans serif for headings and serif for body text. Peter's guide used the company color in the headings and as shading (such as in tables). Steve's style guide was black with grey shading; no color. Peter's templates had pictures of the products on the front covers while there were no graphics on Steve's covers though both positioned the company logo in the same place on the cover. One wonders whether "branding" was being used by the editors to justify some of their "personal" style points in manuals.

As the alignment of the two guides seemed to be going slowly, the European writers began to discuss this issue in their monthly teleconferences.

March 6, 2009: Monthly Teleconference Between the European Writers

Sara: The editorial team has been working away for seven months now on aligning the style guides and, well, to be honest we still seem to have two distinct style guides.

Dirk: I know. Both editors say that each complies with the branding guidelines, but the guides as well as the templates look so different.

Sonia: The branding guidelines are really to keep the company look consistent and ensure we correctly use the approved fonts, colors as well as the company and product logos. If you like, to ensure a high-level consistent look. I don't think marketing intended to microcontrol technical publications.

Gabor: I asked at the last editorial meeting if it was the long-term policy to have two distinct style guides and no universal style guide. If it was, then we've wasted much of the last seven months going nowhere. Both Peter and Steve said that it was their goal to have a single global style guide. Steve added that it would take a long time getting there. I think it was Steve who said, "We can't simply 'switch over' to a single guide without risking serious disruptions."

Sara: Why not? We've done it before with Peter's style guide and templates.

Sonia: We're looking at the reality of style guides being a very territorial document. Let's just hope there isn't another acquisition and a third style guide walks in the door.

Gabor: I told Steve and Peter that they needed to get their managers to bring up this issue with the business unit boss to whom both tech pub departments report. The editorial meetings by themselves aren't doing it. At times it feels like I'm going to the dentist to have a blocked caption pulled. And two dentists are pulling it.

Sara: You poor thing. Well, all this style dental work is out of our hands. U.S. management will be the decision maker here. We're just spectators.... OK, let's see... next item on our monthly agenda is in-country reviews of translations. The translation agency wants to know how we can speed them up as some reviewers are taking way way too long.

MERGING OF TECH PUB DEPARTMENTS: BACK TO A SINGLE STYLE GUIDE AGAIN

In May 2009, after nine month's work, the updated style guides were released. Although the original plan had been to integrate the two style guides, they were still distinct guides. True, differences had been softened but.... The two editors still claimed their territories, even after all those months of work. This time there were no face-to-face group meetings to make the announcement. Business travel was still frozen due to the challenging economic situation. The release was all done by e-mail, not even a teleconference. There was no sense of drama or buzz like last time. Each writing group simply received a copy of its own updated style guide.

However, there wasn't much time to settle down with the latest guides before change happened yet again. Within weeks, Nancy left the company to pursue a career more focused on marketing communication. In July, barely three months after the joint release, U.S. management announced that the two separate technical publications departments at Shannon and Reynolds would now be merged, effective immediately.

The European writers would now report to the United States. In the future, there would be just one global style guide and everyone would use the same documentation tool, Microsoft Word. After barely 18 months, Adobe FrameMaker would be abandoned. No sooner had Peter's team got most manuals into Frame than they'd now have to move them to Word. Life is circular.

Peter and a contract writer from his team were let go. Steve's manager, Susan, was now managing 17 writers scattered across different sites and continents. Steve became the global editor-in-chief. And Peter's style guide was dead.

The suddenness of the change caught everyone by surprise. Sara felt disheartened at the loss of all the work that had been put into the Frame-based style guide and templates. However, Steve did say that over time he would move many of the useful items from Peter's guidelines into the new global style guide. He told Sara that eventually he would include the information on doing graphics, together with examples, in the style guide but he would not be using the ISO safety icons. He considered such items "visual clutter."

It was frustrating that after nine months of "consolidation," many of the graphic recommendations for localization still weren't in Steve's style guide. Sara didn't know how he was going to include the examples as his guide was a Help file with no graphics.

"You reach a stage sometimes," Sara thought, "where you just don't have the energy to comment."

But another part of her was optimistic. Now she would again be able to share the source Word files with her internal and external customers. This was good news as the sales offices had been getting increasingly discontented and vocal about not being able to translate manuals themselves and had been complaining to upper management in Lyon. Her management knew she couldn't do much to help them; she simply had no time to convert the Frame files into Word and there was no budget for a translation agency to do the work. Now the documentation could again become more "customer" friendly and not just focused on being end-user friendly.

U.S. management had put Steve in charge of creating international technical documentation. Steve was now responsible for guiding the company's English and translated documentation and software/firmware. He was genuinely keen to learn more about translation, localization and the documentation needs of the different regional markets. He admitted that he had little or no experience in these areas. So yet again the European writers had a person in charge who knew little about these important areas.

How was someone without experience in these areas supposed to "guide" such processes in a timely manner and on budget? Would they ever get someone who actually had trench experience of international work before becoming responsible for global documentation? *Plus ça change, plus c'est la même chose*, as the French say.

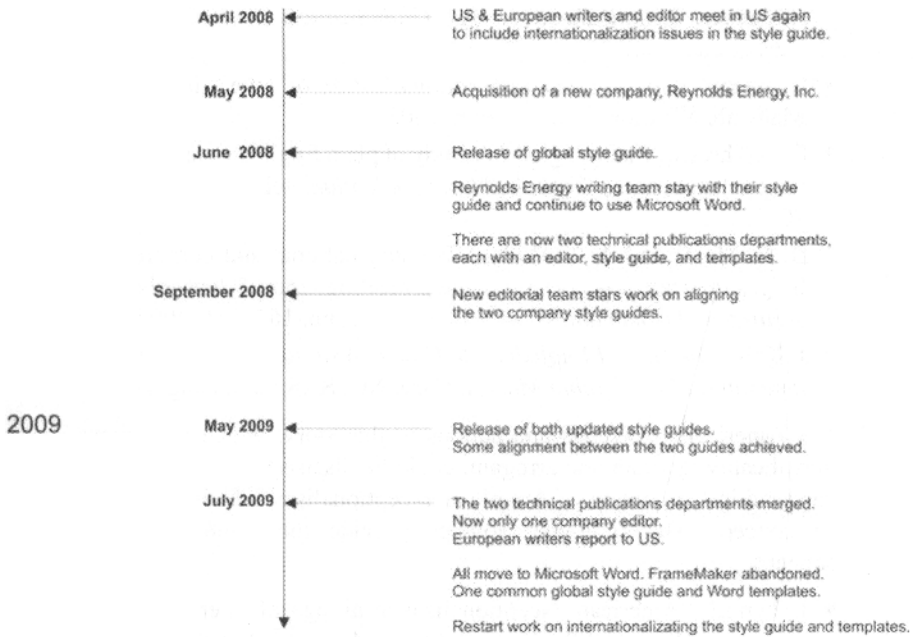
Mergers and acquisitions (M&As) invariably entail company restructuring and changes to business needs. They can also bring together disparate groups often spread out geographically with different cultures and experiences. A successful merger of teams needs open communication and a clear explanation of the new goals. Everybody needs to feel part of the new structure and that their skills are valued. Trust matters and it is something easy to destroy and difficult to rebuild.

The team leaders need to be honest. If they lack in-depth experience in areas that are now needed by the company, such as in internationalization and localization, and others in the merged team do have such experience, then the leaders should not be afraid to seek the active participation of those with that expertise, even if the expertise is based half a planet away and not next door. Control cannot be narrowly focused on a small group with little international experience. If a team feels that its culture, skills, and regional market needs have not been recognized by the “ruling” team, this can quickly create tension. The “subordinate” team may decide to “fight back” for the recognition of their regional needs. Their local managers will often agree with this tactic as they too may feel that their business needs are not being met.

Furthermore, with repeated departmental restructuring that can happen with M&As, reshuffled teams may lose the gains made for their regional markets and must now restart their case again under a new leader. So it’s important that leaders are aware of international documentation needs before making changes. Otherwise, working life really can be frustratingly circular in multinationals. Regional markets are often different. It is important that we have an understanding of what these differences are and how they can impact documentation. And an obvious place to start learning is from our own team members located around the world.

SUMMARY OF LIFE CYCLE OF THE STYLE GUIDES





RECOMMENDED READINGS

1. This story brought up a number of concepts: translation, localization, and internationalization. These terms tend to be defined somewhat differently across sources and industries. The following readings will get you started in understanding them:
 - R. Ishida and S. K. Miller. (2010, Sept. 27), *Localization vs. Internationalization*. Available: <http://www.w3.org/International/questions/qa-i18n>, accessed April 23, 2012.
 - N. Kano and Microsoft (2012), "Chapter 1: Understanding internationalization," in *Developing International Software*. Available: <http://msdn.microsoft.com/en-us/library/cc194758.aspx>, accessed April 23, 2012.
 - J. B. Strother, "Localization vs. internationalization: E-learning programs for the aviation industry," in *Proceedings of E-Learn World Conference on E-Learning in Corporate, Government, Healthcare, & Higher Education, Montreal, Quebec, Canada, 2002*, pp. 895–900.
2. The story provides a number of techniques for translation and localization. To learn more about these techniques and the broader strategies of creating global and international documentation, refer to the following sources:
 - B. Esselink, *A Practical Guide to Localization*. Philadelphia: John Benjamins, 2000.

- J. Yunker, *Beyond Borders: Web Globalization Strategies*. Indianapolis: New Riders Publishing, 2003.
 - N. Aykin, *Usability and Internationalization of Information Technology*. Mahwah, NJ: Lawrence Erlbaum, 2005.
 - E. A. Thrush, “Plain English? A study of plain English vocabulary and international audiences,” *Technical Communication*, vol. 48, no. 3, pp. 289–296, 2001.
 - D. L. Major and A. Yoshida, “Crossing national and corporate cultures: Stages in localizing a pre-production meeting report,” *Journal of Technical Writing and Communication*, vol. 37, no. 2, pp. 167–181, 2007.
 - J. Kohl, *The Global English Style Guide: Writing Clear Translatable Documentation for a Global Market*. Cary, NC: SAS Publishing, 2008.
3. The Americans’ attitudes and actions in this story, which sometimes seem inexplicably ignorant and arrogant, could be discussed and may be better understood in the context of American exceptionalism, which is itself a debated concept. The following sources provide more information on this concept:
- I. Tyrrell, “American exceptionalism in an age of international history,” *American Historical Review*, vol. 96, no. 4, pp. 1031–1055, 1991.
 - B. E. Shafer, Ed., *Is America Different? A New Look at American Exceptionalism*. New York: Oxford University Press, 1991.
 - D. L. Madsen, *American Exceptionalism*. Edinburgh: Edinburgh University Press, 1998.

DISCUSSION QUESTIONS

1. Why is it important for technical writers and those who manage translations to work closely together? What feedback from the translation process could be useful to writers for their work?
2. How can writers increase their international experience if they are unable to travel for their work or do not directly work with colleagues in other countries?
3. The story discusses the work involved in translating and localizing graphics. Find some graphic examples from manuals that will be good as well as poor candidates for translation and localization.
4. What is the importance of using a style guide in technical communication projects, especially in a transnational company the size and magnitude of Shannon Global Facilities? And why would a style guide become “a very territorial document”?
5. Can there truly be a “global” style guide? What content should such a guide try to encompass?
6. Was it or was it not “the job of technical writers to get involved with cost is-

sues”? How might the answer to this question change when we consider both the domestic and international market? What is the implication of this question to technical communication education?

7. What impact can mergers and acquisitions have on a technical publications department and on writers? How can publication managers and their managers foster a cooperative spirit between writing teams pulled together by organizational change?
8. In the story, the European technical writers, because of their concerns and challenges, were frustrated by the American writers, editors, and management. What do you think were the American team’s primary concerns? What might be the challenges that they faced?

