

Planning and Organizing Documents

Usually, large technical documents are the product of many individual efforts. In order for the product to be effective, the individuals contributing to the document need to work together as a team. Teams go through four basic stages as they achieve their end goal: forming, storming, norming, and performing. Planning technical documents around these stages facilitates the creation of more effective technical documents.

Stage One: Forming

In this stage, the team should start to determine its purpose and goals. In order to do so, they should ask the following questions:

- 1) What are we being asked to do?
- 2) What are we **not** being asked to do?
- 3) What is our mission statement and what are our objectives?

Determining its mission statement and objectives is the most foundational task a team can perform. Without a clearly defined mission statement and set of secondary objectives, the team will struggle to keep cohesion and unity throughout the composing process. After a team determines its mission statement and objectives, it should define the more details of the project:

- 4) What should our end products be? When should they be due?
- 5) Who are our clients? What are their values?
- 6) What are the physical, political, and economic factors that influence this project? How should we adjust to them?

Stage Two: Storming

Conflict is a healthy part of team formation. In order to make it through periods of conflict and achieve their goals, all teams should pre-select methods for conflict resolution. At the beginning of a project, the team should decide how it will handle conflict: *Will contentious issues be resolved through majority vote? Is consensus required? Should a third party mediate split votes?* Answering these questions early on will pay dividends when the pressure to accomplish objectives and complete the project is high.

Stage Three: Norming

Once the team resolves conflict, team members will start adopting team roles and working together to achieve objectives. Sometimes, though, the team needs to fulfill unforeseen roles. When determining which strengths/expertise are

required by the role or task, the team should consider the following three questions:

1) Does this role require **people-oriented** skills?

- In other words, does the role require someone who can keep track of objectives, questions, and decisions and communicate that information to team members?
- Should the person in this role be able to network with resources and people outside the team in order to bring in new information and fresh perspectives?

2) Does this role require **action-oriented** skills?

- In other words, does the role require someone who keeps the team accountable for what's been accomplished?
- Does the role require a person who is good at turning abstract objectives into real actions?
- Does the team need a detail-oriented person who monitors the overall quality of the project?

3) Does this role require **cerebral** skills?

- Does the team need someone who critiques decisions and reasoning?
- Does the team need an innovative thinker who provides big solutions?
- Does the team need a subject-matter expert whose expertise currently is not present in the group?

Stage Four: Performing

Once roles are clear and the team begins delivering end products, they can refine the process by which they produce documents. This refinement should take place in a four-stage cycle:

