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Identity, Value, and Power: a Qualitative Study of the Complexity of the Working Relationship Between Technical Communicators and Subject Matter Experts

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IDENTITY, VALUE, AND POWER: A QUALITATIVE STUDY OF THE COMPLEXITY OF THE
WORKING RELATIONSHIP BETWEEN TECHNICAL COMMUNICATORS AND SUBJECT
MATTER EXPERTS

by

Tammy Rice-Bailey

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ABSTRACT

IDENTITY, VALUE, AND POWER: A QUALITATIVE STUDY OF THE COMPLEXITY OF THE WORKING RELATIONSHIP BETWEEN TECHNICAL COMMUNICATORS AND SUBJECT MATTER EXPERTS

by

Tammy Rice-Bailey

The University of Wisconsin-Milwaukee, 2014

Under the Supervision of Dr. Rachel Spilka

The working relationship between Technical Communicators (TCs) and their Subject Matter Experts (SMEs) can impact such key TC goals as adding valuable contributions, engaging in successful collaboration, and producing quality documentation. Despite the primacy of this relationship, no systematic, qualitative research study in our field has yet examined the depth or breadth of the TC/SME relationship.

To investigate the nature and impact of the TC/SME relationship, I conducted a two-part, qualitative study to explore how TCs and SMEs define the role, value, and power of the TC; identify the behaviors TCs and SMEs report as helpful and damaging in their counterparts; and examine the strategies and recommendations of TCs and SMEs for creating successful working relationships. I used a combination of theoretical lenses including Actor Network Theory, Community of Practice Theory, and Compliance-Gaining Theory to guide my investigation and analyze my data.

The data I gathered through e-mail surveys and telephone interviews exposed overlapping and diverging perspectives regarding the TC's role. SMEs largely perceived the TCs as information-seekers and educators; while TCs described their role more frequently in terms of information gatherers, translators, and audience advocates. My data also found that while TCs are sometimes uncomfortable talking about the value they add, they consider their value especially central in terms of end-user documentation, the organization, and the department for which they work.

As a result of my analysis, I arrived at new taxonomies for critical skills SMEs want TCs to have and for critical skills TCs want SMEs to have. My analysis also allowed me to devise a four-part categorization (Affiliation, Accommodation, Coercion, and Resourcefulness) of the most-cited TC strategies for working with SMEs. My research provides strategies for TC practitioners to improve their workplace relationships with SMEs; proposals for TC educators to prepare their students to gain professional status with SMEs; and ideas for further areas in which this combination of theoretical frameworks can be applied.

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This dissertation is dedicated to the memory of my grandmother, Margaret (Lynch) Owens, mother of eight, grandmother of 22, opera singer, and unwavering champion of “career girls.”

CHAPTER 1: BACKGROUND AND RATIONALE FOR STUDY

“I have been waiting years for someone to ask me about this!”

–Response of a Technical Communicator on being asked to participate in a study about her experiences working with Subject Matter Experts

INTRODUCTION

My first career was as a Technical Communication practitioner. I spent two decades in corporate settings working as a Technical Writer, Instructional Design Manager, and Training Project Manager. In each of these positions, my primary concern was with two groups of people: my audiences (or readers) and my Subject Matter Experts (SMEs). The former drove my rhetorical considerations of the documentation, training, or process I was developing or managing. The latter determined, at least in part, the ease or difficulty with which I could complete this documentation, training, or process.

Over the years, I have encountered SMEs who were brilliant but reticent; inarticulate and long-winded; terse and aggravated; helpful and friendly; and all sorts of combinations in-between. Early in my career, I encountered an SME who was a bright, young, arrogant computer programmer. He answered several of my questions with “this is basic information,” or “these are ridiculous questions.” I was demoralized during most of our interactions. One day, when I needed to question Mark¹ about changes to a user

¹ All individual and company names are pseudonyms.

interface, and he gave me his standard, “everyone knows this,” response, I surprised myself by retorting, “So, you’re telling me you were born with this information?” The shocked look on his face was priceless, and I realized that I had cracked the code to successfully working with him. Several months later, I moved onto new projects, and another technical writer starting working with Mark. One afternoon, Ellie appeared in my office, crying. She knew I was friends with Mark and asked how I could stand him because he was just rude and mean. Through giving her some “Senior Technical Writer” advice on dealing with difficult SMEs, I became cognizant of the critical nature of a good working relationship between TCs and SMEs. I have remained interested in the dynamics of this relationship and have continued to study and research it.

SMEs, or as they are sometimes called, Subject Matter Specialists (SMSs), are individuals who possess knowledge (often technical or procedural in nature) that Technical Communicators (TCs) must obtain to compose texts in such genres as user guides, reference guides, online help, and training material. Examples of people who typically work as SMEs are engineers, computer programmer/analysts, technicians, and tradespeople. The working relationship between TCs and their SMEs is very often one of the most important in enabling TCs to complete their documentation tasks. However, this workplace relationship is often described as difficult and contentious. For example, Wilson and Ford’s (2003) study included a listserv comment from one writer stating that she had the “distinct displeasure of working with some very difficult subject matter experts (SMEs).” Another writer in Wilson and Ford’s study commented that he felt like a “second-class citizen” when working with some SMEs (147). Lee and Mehlenbacher’s

(2000) internet-based survey of 31 technical writing professionals confirmed this perception of a negative TC/SME relationship: they found that TCs are concerned with the lack of time the SMEs give them and the lack of respect they express for the writer's role. The comment of one writer in their study suggested the problem of knowledge-based power. This writer noted, "It is very hard to talk on the same level as someone who knows way more than I do about a product. I end up feeling stupid, and they end up exasperated that they can't get their point across" (547). A common assumption in the literature is that issues stem from SMEs not having the time to work with the writers, and the writers having little positional power.

Despite this issue's continued relevance, it has been some time since the topic of TC/SME relationships has been addressed in Technical Communication scholarship. In 1991, Debbie Walkowski asked 19 software engineers (SMEs) two questions: "What qualities do you most appreciate in a technical writer?" and "What qualities do you least appreciate?" The responses of the SMEs in Walkowski's survey indicated that SMEs are concerned with five general categories: technical knowledge, writing and language skills, communication ability, attitude, and professionalism. Almost ten years later, Lee and Mehlenbacher (2000) asked the similar questions of 31 technical writers. Among the questions they asked were, "What aspects do you like about working with SMEs?" and "What aspects do you dislike?" (545). Lee and Mehlenbacher concluded that although both groups (TCs and SMEs) shared many of the same values and perspectives, they also both experienced tension and frustration in their interactions. In addition, Lee and Mehlenbacher asked what the TCs saw as their role in working with SMEs and what

SMEs could do to make the process easier. They found that TCs defined their role in terms of learning, being prepared, interviewing, and “acting as the link between the company and the user” (547). Lee and Mehlenbacher also found that SMEs could make the process easier by making time for the TCs, by understanding and respecting the importance of the documentation process and the writer’s role, and by learning to “communicate more effectively” (547).

Recent scholarship on the relationship between TCs and SMEs has focused on such issues as the advantages of TCs and SMEs collaborating using Web 2.0 technologies (Rice, 2009) or has suggested applying creative fixes to the “negative stereotyping [that] hinders successful communication” on both sides (Amare, 2004, 211). Amare, for example, applies sociologist Erving Goffman’s (theater-based) concepts of roles/scripts, setting/rehearsal, and self-presentation/impression management to strategies that could also apply to the interaction between technical writers and engineers. In addition to the academic scholarship, the practitioner literature (Boehle, 2007; Eckel, 2010; Lee, 2008; and others) is filled with suggestions on how to improve the often-strained relationship between TCs and SMEs. What the field has yet to examine systematically and fully is the dissemination and gatekeeping of information, the role of SME’s possible control over these, and the subsequent detriment to the goals, responsibilities, and success of TCs.

The TC/SME relationship plays a key role in the work of technical communicators and more generally, in the often critical roles of information gathering and gatekeeping in

work contexts. My study has the potential to inform the field about the influence of the TC/SME relationship on information/knowledge creation, sharing, and dissemination in industry, and to gatekeeping of information (power issues). The field has yet to examine systematically and fully the role of the SME's possible control over all of that to the detriment of TC goals, responsibilities, and success.

Beyond asking which qualities each group most and least like about the other and identifying solutions for a barely-explored problem, scholarship has failed to examine the TC/SME relationship comprehensively. For example, other than brief examinations of "likes" and "dislikes," the field lacks sufficient knowledge regarding TC and SME perceptions about their successful and failed partnerships. Nor has TC scholarship looked beyond participant perceptions to examine accounts of successful and unsuccessful outcomes of TC/SME collaborations or at how issues of identity, value, and power play into this partnership. In short, despite the key roles that these relationships have in the work of TCs, and more generally, in the often critical roles of information gathering and gatekeeping in work contexts, no systematic, qualitative research study has yet looked in depth or breadth at the TC/SME relationship.

PURPOSE OF THIS PROJECT

Technical Communication practitioners are generally reliant on professionals who have other, full-time responsibilities and for whom acting as an SME is simply an add-on task that is secondary to their primary work. Alternately, the primary responsibility of the

TCs is to design, create, or update texts. Unless an SME's time is allocated 100 percent to the role of SME by their organization (which, in my professional experience, is rare), conflicting priorities will always be an issue for those who serve as SMEs. Further, except in unusual circumstances, working with TCs will typically be a secondary or tertiary concern for SMEs. Yet, the SME/TC partnership will continue to be instrumental to the success of organizations that create any documentation, online help, training, or tutorials for their clients and users. For this reason, it is imperative that we better understand the working relationship between TCs and SMEs.

When TCs and SMEs forge relationships that both groups consider productive and effective, documentation and training tasks are typically completed successfully. This success can garner self-confidence in the TC and positive recognition from team members. When TCs and SMEs are seen as effective partners, there is an increased likelihood that TCs will be regarded as valuable team members and will increasingly be called upon to assist with project work, thus raising the overall station of TCs within the organization. Conversely, when the relationship between the TC and the SME is non-existent, dysfunctional, or fails, TCs are likely to remain relegated to positions of limited power and influence, and the field of Technical Communication may be considered ineffectual and less relevant to industry.

The purpose of my dissertation is to analyze the nature and complexities of the TC/SME relationship by exploring how TCs and SMEs define the role, value, and power of the TC; identifying the behaviors TCs and SMEs report as helpful and damaging in their

counterparts; and examining the strategies and recommendations of TCs and SMEs for creating successful working relationships. I will do this by thoroughly considering identifying, examining, and analyzing how TCs and SMEs perceive of and talk about their workplace interactions with each other and by showing the relevance of these findings to the field of Technical Communication. The goal of my research is to look at the nature and complexities of the relationship, which required that I move beyond the likes/dislikes identified by Walkowski (1991) and Lee and Mehlenbacher (2000) and examine more fully the nature and complexities of the TC/SME relationship from the perspective of both experienced TCs and experienced SMEs. This study contributes to current knowledge by investigating in greater depth the working relationship between TCs and SMEs with special focus on how TCs and SMEs characterize the roles, value, and power of the TCS; what behaviors TCs and SMEs report as helpful or detrimental in their counterparts; and how TCs describe obtaining compliance from their SMEs.

This project is significant because it has potential to contribute to three conversations in the field of Technical Communication. These conversations, which consider issues of roles/identity, value, and power as they relate to the TC include the roles of the TC, the identity and value of the TC, and the workplace power of TCs.

ROLES OF THE TC

I have experienced, first-hand, how the roles of the TC are minimized by SMEs, even when more detailed titles are used. I was initially hired as a consultant by Global

Software to edit a textbook. Once I completed that project, the company moved me into the Documentation Department, where my job was to create online help screens.

Around that time my title changed from Writing Consultant to Technical Writer, and I was hired as a full-time employee. There was a separate group of Instructional Designers who created training materials based on the online help we wrote. It was not uncommon for Technical Writers to transfer into the Instructional Design Group and vice versa. Despite the fact that we had distinct (although often arbitrary) titles, we were all referred to as *Writers* by the SMEs (Programmer/Analysts) and by most of management. While writing was one role that each of us had in common, we also assumed a myriad of other non-writing roles including project manager, department liaison, internal trainer, and corporate facilitator. The title Writer relegated our role to writing, although we had a number of additional competencies.

Competencies

Before examining the relationship between the TC and SME, it is critical to have a basic understanding of the conventionally expected roles of the TC. My dissertation examines the ways in which both TCs and SMEs characterize the roles of the TC in their working partnerships. The purpose of this section is to identify how our field has traditionally defined the roles and competencies of the TC and how these characterizations have continued to change.

Historically, TCs have been considered workplace writers, and much of the late 20th century scholarship on TCs (formerly often referred to as *Technical Writers* or *Documentation Specialists*) focused on such areas as the composing practices and strategies of writers (Couture and Rymer, 1993; Faigley, 1985; Odell, 1985; and others); the intertextuality of workplace writing, sometimes between written, oral, and hybrid modes of discourse (Paradis, Dobrin, and Miller, 1995; Selzer, 1983; Spilka, 1990, 1993); and workplace writing collaborations (Burnett, 1993; Ede and Lunsford, 2009; Gee, Hull, and Lankshear, 1996; Odell, 1985; Smart, 2006) with a strong emphasis on “the social construction of knowledge” (Allen, Atkinson, Morgan, Moore, and Snow, 2004, 351). The “Cultural Turn” followed, and the focus shifted to the rhetoric of technology and most recently, civic engagement, user engagement, and communities of practice.

Beyond the writing and composing process, other TC competencies that scholars have examined include technical knowledge, interpersonal skills, and organizational knowledge. For instance, there have been discussions in the field about the best balance between rhetorical/analytical/writing abilities and technical skills that TCs need to possess. Some of these discussions privilege rhetorical skills over technical competencies (e.g. Kim and Tolley, 2006), but most scholars acknowledge the need to teach at least some level of technology in our TC classes, as this is a competency in which practitioners are expected to be proficient. Scholars have also cited interpersonal skills (Doheny-Farina, 2004; Odell, 1985; Winsberg, 2000; and others) as a competency necessary for successfully gathering information. This emphasis on interpersonal skills was further described by Hart and Conklin (2006), who note that “the profession is

increasingly focusing on...impacting human behavior rather than texts" (413). In fact, participants in a study by Wilson and Ford (2003) about TCs in the workplace mentioned they wish they had been taught, among other things, interviewing skills. Scholars (MacKinnon, 1993; Dias et al, 2003; and others) have aptly characterized the relationship between learning to write in an organization and learning the organization itself. Sometimes this relationship may not be immediately apparent to the new TC, but being able to discern which information is important to the community is a critical skill particularly to the SMEs. As MacKinnon notes in describing novice technical communicators, "[They] were developing not only as writers, but also as members of a community they were still struggling to understand" (52). Driscoll (1989) adds, "corporate culture contributes many of the interpretive standards that affect writers' choice of content, persuasive approach, and word choice" (64).

The cultural approach of the 1990s and 2000s sought a deeper understanding of the connection between cultural and technical practices (Grabill, 2006), and subsequently identified the need for TCs to be cultural interpreters of knowledge (Wills, 2006), "cultural critics, and rhetorically effective producers" (Scott, Longo, and Wills, 2006, 2). The cultural approach encouraged TCs to learn more about and to become more involved in the technical content of their work (Slack, Miller, and Doak, 1993); and to understand there are established relationships within organizations that regulate "who says what to whom, when, where, why, and how" (Paré 2002). This information is critical for TCs to understand in their interactions with SMEs.

There are myriad other competencies cited as critical to the role of the TC. A few examples of these competencies include the ability to be leaders (Dicks, 2010); to recognize the discourse of others (Dautermann, 1993); to become open to other value systems (Carliner, 2003); to “assist in the production and reproduction of an organization’s knowledge, power, and culture” (Dias et al, 1999, 120); and to distinguish between usefulness and ease of use (Mirel, 2002, 169). A few of these themes will reemerge in the next section, *Identity and Value of the TC*, as they play into the description of symbolic-analytic workers. Hart and Conklin (2006) have recognized a need for “narratives, metaphors, and images that capture the reality of contemporary technical communication work...” (396), and suggest this may be a way to redefine the role of technical communicators.

Uncertainty and Anxiety

Being asked to describe their roles and competencies can leave the TC with feelings of uncertainty and anxiety. Frequently, the term Technical Communicator is not well-understood in the workplace or elsewhere, and it is difficult for many TCs to fully expound upon the roles and competencies that are expected of them. Some employers do not know exactly what a TC does, and in fact, sometimes TCs themselves cannot articulate their skill set and what they bring to the table. TCs are hired by a wide array of different organizations for an equally diverse set of purposes. Some TCs write or edit user guides, others build websites, while still others create training programs. And the list goes on. As Waldeck, Seibold, and Flanagin (2004) point out, “organizational

membership can be anxiety producing even for those who are confident in their social and professional competence because so much is at stake” (161). Often the novice TC has a type of uncertainty that say, novice accountants, nurses, or computer programmers would not have. This uncertainty is related to having to define what exactly they do. The TC must decide how to characterize his role. As Brady and Schreiber (2013) point out, it is important for TCs to learn to “self-assess their work in an effort to make these skills meaningful and visible” (355). Arriving at this definition for the TC is further complicated by the fact that the job the TC takes is a major factor in establishing the specifics of that role.

My dissertation looks at the intersections and divergences of what competencies TCs and SMEs find critical in the role of the TC. It also recognizes competencies like the ability to educate others on their role and to interact with technology that have not generated much conversation in the TC field.

IDENTITY AND VALUE OF THE TC

In the early 1990s, I was one of two technical writers who worked at LaSalle Financial. Jan, the other writer, reported to one vice president of the organization, and I reported to his counterpart in another department. While my boss seemed to have a solid awareness of the type of work I did, Jan’s boss did not. In fact, Jan ended up doing a lot of administrative work because she could, as her boss said, “make things look pretty.” One morning Jan stormed over to my desk and asked me, “Can you believe he gave me

flowers for *Secretaries' Day*?" This solidified for both Jan and me that Jan's perception of her identity and role was much different than the perception of her boss.

Communicating the Value of the TC

What I experienced and observed at this organization has become a point of intense conversation in our field. Over the past decade, technical communication scholars (Brady and Schreiber, 2013; Dannels, 2000; Redish, 2003; Savage, 2003; Schriver, 2002; Schryer & Spoel, 2005; Walton, 2013; Wilson and Ford, 2003; and others) have examined the professional identity and value of technical communicators (TCs). This discussion likely grew out of the realization that industry did not always recognize and promote the full range of skills TCs bring to the workplace and subsequently did not adequately value the role of the TC. A key strand of this conversation has centered on defining, measuring, and communicating this value. One way to define the value of TCs, according to Hart and Conklin (2006), is to describe their work in the context of the processes they manage, the relationships they create, and in terms of their diverse skill set (412). Swarts (2011) notes the importance of networks and how TCs' texts mediate these networks. As Redish (2003) explains, it is important for TCs to be able to both measure value and to communicate this value to management.

One complication in promoting the value of TCs in an organization is lack of visibility. The amount of visibility an individual TC or Technical Communication Department has in the workplace can increase (or hinder) the ability to showcase their value. In some settings, TCs can become nearly invisible, and this lack of visibility can lead to the

impression that they are not important and have little value. Brady and Schreiber (2013) note that visibility is “complicated by two overlapping factors: status (how others view and value the technical communicator’s role and work) and identity (how technical communicators view and value their own role and work” (351).

Within the first few months of my employment with Quick Serve’s Worldwide Training, Learning, and Development Department, I had the good fortune of being the TC assigned to a pilot training program that was being tested in the French market. This small project, which initially consisted of my documenting a simple modification to kitchen equipment layout for one country, ended up being the prototype for a global change in equipment layouts and procedures. By the time I had completed the training for France, Spain, the U.K., and Germany, I was managing four consultants, participating in meetings with leadership from the U.S. and abroad, and making suggestions for training enhancements. I was the only TC on the project, and the only staff-level contributor in groups that consisted primarily of Directors, Vice Presidents, and above. This turned out very well for me, in that organizational leadership became familiar with me and with my work. It raised my profile in the organization, and helped me win a coveted *Project of Distinction* award during my first year on the job. The flip side of this was that there were many equally if not better-qualified TCs in my department who could have managed this project as well as I had. Some of these TCs had several years experience with the company but had never had the opportunity to be involved in such a high-profile project. In my experience, it is not common for staff-level, skilled TCs to be given or to seek out opportunities to interact with high-level management. The rarity of

this type of interaction results in few opportunities for TCs to build credibility and strengthen reputation, which prohibits further interaction, and the cycle continues.

The struggles TCs face when attempting to gain greater visibility, for example, through showing the relevance and value of their work, have been well-documented by various scholars (Anschultz and Rosenberg, 2002; Clark, 2006; Dicks, 2010; Faber and Johnson-Eilola, 2003; Redish, 2003; Savage, 2004; and others). As one scholar (Henry 2006) notes, writers are often perceived as second-class support staff that have low organizational status (213). Brady and Schreiber also suggest that TCs are challenged because to succeed in corporate environments, they must continuously explain their value to co-workers and bosses and must also begin to represent themselves and their work as dynamic. Perhaps because the Programmer Analysts had more-clearly delineated roles or easier-to-articulate skill sets, they are perceived by some to be more important than their TC counterparts and subsequently enjoy higher status within the organization.

A Powerful Concept: The TC as Symbolic-Analytic Worker

As indicated earlier in this chapter, one challenge for TCs is the way they perceive their own work. As Johnson-Eilola notes (2004), TCs often perceive their work as static, rather than dynamic and this perception drives them to promote their own value in limited ways (187). An example of this self-determining behavior is the TC who accepts the limiting title of *Writer* and limits the description of her work to writing, editing, and

proofreading. While the limited scope of a particular job may sometimes be the case, in other cases, it is the TC who fails to give herself credit for project management, collaboration or other skills. This limited approach to explaining their value inevitably restricts the TCs' understanding of their own value as it applies to larger, organizational contexts and subsequently restricts how well the TC can explain their value to SMEs.

Early communication theories held that communicators translate (or transfer) meaning to readers, who receive it without question/response. Modern theory contests this transmission view and points out that communicators and readers both create meaning because they have a dynamic and interactive relationship. An alternative to this transmission view is the idea that TCs are symbolic-analytic workers. The term symbolic-analytic worker was coined by Robert Reich, the former U.S. Secretary of Labor, and then applied to technical communication theory by Johnson-Eilola (1996), who asserts that TCs must move from a focus on supporting products toward a focus on providing value through knowledge work that aligns with an organization's definition of value. Symbolic-analytic workers, explains Dicks (2010), are strategic contributors who can communicate effectively with customers. This is a type of power because it permits writers to use their critical thinking skills to accomplish tactical and strategic work as opposed to simply performing administrative tasks such as proofreading and copyediting. Dicks explains technical communicators need to move away from performing commodity work and toward performing symbolic-analytic work, and they can no longer afford to be seen merely as the translators because translation is often not perceived as value-added. Dicks also notes, it is "imperative for technical

communicators to align themselves with the overall goals of the organization and to show others in the organization how they are doing so” (60). Along this same line of reasoning Johnson-Eilola (1996) states that symbolic analytic workers must move from focus on supporting products toward a focus on providing value through knowledge work that aligns with an organization’s definition of value. As Redish and Ramey (1993) explain, many organizations do not value what TCs do for them, and TCs are under ever greater pressure to justify their role and their activities.

Some organizations and departments have adopted valuing self-promotion and have taken measures to equip even staff-level employees such as TCs to be strategic contributors. When I worked for Quick Serve Corporation, all members of our training department collectively wrote a departmental mission statement that clearly aligned our work with the company’s goals and values. We also developed an “elevator speech” to use if we were to meet a company executive in the elevator (or on a plane, or wherever) and need to introduce ourselves. The elevator speech was effectively a 30 second update on the name of our department and what major projects we supported. The idea was to heighten awareness of who we were, what value we added, and how our project work tied to the company’s mission. I’m sure this heightened awareness of our department’s value was also helpful when budgetary decisions were made. As William Hart-Davidson (2010) advises us, “high-quality information cannot be produced, maintained, and managed solely by a few select members of the organization (129).” Members at all staff levels of an organization, including TCs, who are able to articulate the mission, goals, and values of that organization and how they directly contribute to

those aims, are more likely to be considered instrumental contributors to that organization. TCs who are considered instrumental contributors to their organization will presumably not have as much to “prove” to their SMEs.

Remote and Global Communication

TCs today have access to technologies that both enhance and restrict their communication. The same technology that enables a virtual workplace presents TCs with the challenges and limitations of that virtual workplace. The already daunting task of collaborating with co-workers who are unfamiliar with or skeptical of the TC's role becomes exponentially more difficult when “traditional,” non-digital, in-person methods for building ethos and credibility with co-workers are not an option.

At the same time, the majority of the scholarship in our field still remains focused on local TCs, that is, TCs who are physically located at some workplace where they have varying degrees of direct exposure to their audiences and project teams. However, issues of power and legitimacy take on a new set of challenges when the TCs work on remote and global teams. Only within the past several years have studies started to examine the situation of the remote writer (Barker and Poe, 2002; Brady, 2011; Larbi and Springfield, 2004; Turetken et al, 2010), that is to say, the writer who works offsite (typically from home), has limited connection with the project team and limited to no exposure to the audience. What my study adds to this discussion is an examination and analysis of the relationships between remote TC's and their SMEs.

In the United States, there is a growing trend for organizations to hire employees who telecommute, to outsource writing and training projects, and to subsequently hire contracted workers to perform writing and training tasks. After considering *STC's U.S. Independent Contractor/Temp Agency Survey*, Barker and Poe (2002) explain, "the model of contingent employment is becoming a dominant model among employed writers within most organizations" (151). Even when the TC is an in-house employee of an organization, the TC is likely to be part of a distributed (remote or global) project team. In light of these trends, there is a pressing exigency in our field to examine the particular challenges and needs TCs encounter when they are working on remote and global teams, particularly because these distributed teams offer TCs limited access to their SMEs.

WORKPLACE POWER OF TCS

A common grievance of technical communicators is that they do not have power in their workplace settings. We can easily see how this perception may arise: the technical communicator is often an afterthought for project teams and is only brought to the table in the eleventh hour, when someone decides that documentation might be helpful for a product or a process. I can give countless examples from my own experience where I was put on a rush project and told I would document, for instance, an online help system, but all I could do was "hurry up and wait" because the system programming had been stalled. The hold up on the programming end did not, however, change the ultimate release deadline, so as usual, I would have to work quickly and long

hours to meet that immovable deadline. Because I had limited knowledge about what was happening in the organization and on the project, I did not have an ability to make long-range decisions regarding my work plan. In this scenario, my lack of knowledge hindered my autonomy, and autonomy is a determining factor of power.

Our field has variously defined several aspects of power, including power of persuasion over the larger community (Dautermann, 1993); the ability to establish the company's goals (Doheny-Farina, 2004); the ability to control how one is interpreted and perceived (Faber, 2002); the power to advocate for readers and users and be an agent of change (Johnson; 1997); and the ability to determine what knowledge is valuable (Winsor, 2003). While a number of scholars (Faber, 2003; Paré, 1993; Read, 2011; Winsor, 2003; and others) have written about the relationship between power and knowledge in technical communication, none have singled out the power dynamics between TCs and SMEs. But there are clearly power dynamics because there is access to knowledge at stake for the TC. As Paré (1993) tells us, knowledge and power are linked. Those who decide what constitutes knowledge are necessarily those who hold the power. If the TC relies solely on the SME for knowledge, the power of the TC will necessarily be limited.

The field acknowledges, and continues to research the central role of knowledge retrieval in TC work, but it has yet to examine systematically the complexities of TC knowledge retrieval, including, in particular, the power dynamics involved when TCs attempt to access knowledge that SMEs possess and control. Yet SMEs are typically

considered the primary source of knowledge for many TCs, so their importance and power in the knowledge-seeking process warrants careful examination.

The relationship between knowledge-seeking and perceived or real power differences between TCs and SMEs is important because, as Faber (2003) notes, “Power is not only about top-down domination, but it is more dynamic” (114). And as Winsor (2003) tells us, “within a hierarchy, people in more powerful positions are often able to determine what knowledge is valuable and even what facts or ideas are to count as knowledge for the organization” (7). Understanding power dynamics between TCs and SMEs (who have information and knowledge that TCs must obtain) connects with issues of information/knowledge management and is an important part of understanding those relationships. By exploring the specifics of a key type of relationship for TCs, my study can help the field understand in greater depth and detail some social/interpersonal dynamics of information and knowledge creation, use, and management.

Outside the field of TC, an especially promising approach to talking about power, one that we can apply readily to the power relationships between TCs and SME is suggested by French and Raven (1959, 1990), who describe the Bases of Power. While there is an enormous amount of discourse on power, I settled on the French and Raven model (among the vast realm of possibilities) because of its clarity and simplicity and because it was useful to describe the types of power that I found displayed in my study. I avoided other theories due to their emphasis on elements I was not examining, such as Rational

Choice Framework (popularly used in gaming theory), which focuses on incentive structure and the costs related to different actions in a choice set.

- *Coercive Power is the ability to force someone to do something she does not want to do. My study identifies examples of TCs using coercive power in their interactions with SMEs.*
- *Reward Power is the ability to give someone something they want. This is based on the idea that people are more apt to do something well if they think they will gain something from it.*
- *Legitimate Power is based on formal rank or position. It is the ability to have someone “obey” their orders. This is a grey area in my study. While I have found that few SMEs have legitimate power over TCs, there is some indication that the title of SME has some effect on the TC’s potential perception of the SME as being of higher rank.*
- *Referent Power is the ability to provide someone with a sense of acceptance or approval. A person with referent power may be viewed as a role model.*
- *Expert Power is the ability of someone to gain compliance based on the perception that they possess greater information, knowledge or expertise. My study indicates that SMEs have expert power over TCs, and that TCs have expert power over SMEs.*
- *Informational Power (Raven, 1990) is described as the ability to limit, share, or withhold information from someone. My study indicates that SMEs have informational power over TCs.*

In my project, I find it useful to combine this approach to power with those that have been offered in our field to allow for a broad examination and evaluation of how power operates in relationships between TCs and SMEs. In particular, the areas of Coercive Power and Referent Power are among the strategies used by the TCs in my study to successfully interact with SMEs, and both Expert and Informational Power are used by the SMEs in my study

What we currently know about the power dynamics between TCs and SMEs is limited and inadequate to describe this workplace relationship. Dave Clark (2006) explains, “Contemporary empowerment narratives are insufficiently nuanced to address the complexity of empowerment. At the same time, responses to the narrative have failed to adequately embrace the best of what we know about how information...is connected to more complex and localized distributions and applications of power” (155). The relationship between knowledge and power is filled with stimulating intersections and connections. But this rich topic can also be a minefield for TCs who are unsure how their corporate culture works, who makes the decisions, and upon what knowledge these decisions are based.

CONCLUSION

My study, which involved collecting accounts of specific experiences from and examining attitudes and values of experienced TCs and SMEs, allowed me a complex look at the TC/SME relationship and collaboration. My study will contribute to knowledge in the field about the roles, identity, value, and power of TCs in the workplace.

CHAPTER 2: RESEARCH METHODS

In the previous chapter, I reviewed the existing scholarship on the working relationship between the TC and the SME. I looked specifically at what the field of Technical Communication has discovered about the TC's struggles and successes in these relationships. In this chapter, I discuss a two-part qualitative study that I conducted between June 2012 and August 2013 on the attitudes and perceptions of TCs and SMEs. The goal of this project was to identify how both TCs and SMEs articulated the role and value of the TC; determine the stated or suggested power dynamics that occurred within the TC/SME relationships; determine the factors that influence the perceived success or failure of these partnerships, and identify the strategies experienced TCs used to deal with challenges in these relationships. This chapter contains my research questions, study methodology, study design and participant information, and data collection and analysis methods.

RESEARCH QUESTIONS

The primary question of this study is, "What is the nature and impact of the Technical Communicator/Subject Matter Expert relationship?" My research will focus on the following sub-questions:

1. How do TCs and SMEs define the role, value, and power of the TC?
2. What behaviors do TCs and SMEs report as helpful in their counterparts?
3. What behaviors do TCs and SMEs consider damaging in their counterparts?

STUDY METHODOLOGY

This section explains my decisions to conduct a qualitative study, the theoretical frameworks within which I worked, the study design, and participants. It also describes how I determined what constituted data and the methods (tools) by which I collected this data.

Qualitative Study

To fully answer my research questions, it was important that my study allowed me to ask both general and specific open-ended questions of individuals who worked as TCs and individuals who worked as SMEs. Since I was interested in perceptions and opinions about general behaviors, it was not necessary that I conduct my study in a natural or laboratory setting. Since I was not looking at texts, per say, it was not necessary for me to collect artifacts. What was necessary was that I collect data from several subjects in a variety of industries. My data included any written (via survey or e-mail) or oral (via phone) responses given, questions asked, or comments made by the participants. The best research tradition to answer my research questions was an exploratory, qualitative study. Since very little research has been done on the relationship between the TC and SME, I knew an exploratory study, in which I asked “how?” and “why?” (Sullivan and Spilka, 2010; Yin, 2003) would allow me to develop a greater understanding and ideally, new hypotheses and ideas for further inquiry about a poorly-understood work relationship.

Additional benefits that a qualitative study provided me were the ability to dive in deeply, discover new knowledge (Sullivan and Spilka, 2010), and to discover meaning (Halpern, 1988) about a situation that previous scholarship had only cursorily explored. I also knew that a qualitative study would help me develop a complex and nuanced understanding of the rhetorical decisions my participants made by allowing me to “examine and make note of small cues” (Tracy, 2013, 3) in their writing and discourse that a quantitative or numbers-driven study would not have done. A qualitative study afforded me the opportunity to examine perceptions and collect accounts of specific experiences that illustrated the complexities of the TC/SME relationship and collaboration.

Theoretical Framework

To describe and analyze the working relationship of TCs and SMEs, I drew on three theoretical perspectives: *Actor Network Theory (ANT)*, *Communities of Practice (CoP) Theory*, and *Compliance Gaining Theory*. While I was originally using ANT as the primary lens for my analysis, I soon realized that the coding schemes I was arriving at contained vocabulary (*identity, value, compliance*) that lent itself more readily to social theories of learning, such as CoP and Compliance Gaining Theory. As a result, I extended my theoretical framework to include both Communities of Practice and Compliance Gaining Theory. Communities of Practice Theory allowed me to discuss negotiation of power and meaning and the formation of identities for TCs. Compliance Gaining Theory

allowed me to more fully discuss issues of power, cooperation, and compliance between TCs and SMEs.

Actor-Network Theory. Actor-Network Theory (Callon, 1986a; Latour, 1987; Law, 1987), is best known for its controversial assertion that nonhumans can participate in systems and be part of a social network. Both humans and nonhumans are referred to as *actants*, meaning they are participants in the network. In fact, ANT sees no difference between human and nonhuman actants (Murdoch, 1997). While my research on TCs and SMEs does not specifically deal with objects as actants, ANT framework is useful in studying the relationships between TCs and SMEs because it does not look at individual actors. Instead, it asserts that actants need to form alliances to achieve their aims, and, in fact, these actants are defined through and by their connections to other actants (Latour, 1996). As Meyers explains, actants are “powerless as long as they are not linked to each other” (1996, 10).

In concerning itself with creating alliances and networks, ANT gives us a way to examine and talk about politics and power. In describing ANT, scholars (Spinuzzi, 2008; Miettinen, 1999; Latour, 1996; Swarts, 2011) have explained how networks are created and expanded when actants enroll other actants in the network. Spinuzzi (2008) compares the networks that make up ANT to electrical devices that are spliced together to respond to “unforeseen alliances and uses” (34) and which explains how the networks concern themselves with shifting political-rhetorical alliances and negotiations” (36). In addition, ANT allows us to examine how networks and social order

are continuous sites of struggle (Law, 1992), and “no version of the social order, no organization, and no agent is ever complete, autonomous, and final” (386). Networks need to constantly lengthen or become more intensely connected (Latour, 1996; Spinuzzi, 2008) to remain durable. ANT can, in some ways, help define the struggle of both groups to recognize and display the qualities that the other group values.

ANT will allow me to consider both the negotiations and rhetorical alliances between TCs and their SMEs. However, there are some limitations in using ANT as the sole theoretical lens by which to view and interpret the relationships between TCs and SMEs. As Cresswell et al (2010) write, ANT is too descriptive and “fails to come up with any definitive explanations or approaches of how exactly actors should be viewed and analyzed” (9). Their suggestion for dealing with this methodological problem is to not get lost in the detail and not to lose sight of the wider study. Another limitation of ANT is pointed out by Miettinen (1999), who writes, “[ANT] does not study the mediating cultural resources and ignores such subjects such as learning, expertise, and resources” (182). These topics are critical in the explanation of the TC/SME pairing.

Community of Practice Theory. A Community of Practice (CoP), according to cognitive anthropologists Jean Lave and Etienne Wenger (1991), is a group of people who share information and experiences and learn from each other. CoP Theory is used to explain how newcomers become established members of groups and tell us how these groups really work. Lave and Wenger first used the term communities of practice to describe learning through practice and participation, which they named situated learning. CoPs

initially focused on physical groups. However, in the 1990s, scholars (Brown and Duguid 1991, Robey et al., 2000, Wenger, 1998, and others) also recognized virtual communities of practice. This is an important addition, as several of the TCs in my study work in CoPs with SMEs who are remotely or even globally located.

McDermott (1999) offers several ways that CoPs differ from functional or project teams. One way is how membership is defined. Project team membership is defined by the task, but in the CoP, membership is defined by the knowledge of the members, and members may take on new roles within the group as needs arise. Another difference between the two is that project teams typically dissolve after the completion of a project, but a community of practice can exist as long as the members believe they have something to contribute to it or to gain from it. This description more accurately characterizes the often on-going relationships between TCs and SMEs.

CoP Theory has been used to explain how newcomers or novices to informal groups become established members of those groups. Typically, it looks at how newcomers initially spend time observing and perhaps performing simple tasks as they learn how the group works and how they can participate. Lave and Wenger described this socialization process as legitimate peripheral participation. My study, however, looks at workers, who, despite their experience or tenure, still must forge temporary or ongoing relationships with others in the workplace. Specifically, this study reports on how experienced TCs and experienced SMEs in various fields identify, evaluate, cooperate with, and seek compliance from the other group.

CoP Theory views learning as social participation (Wenger, et al., 2002) and focuses on how individuals construct their identities by actively participating in social communities. In this way, it allows me to examine and discuss how the interactions between TCs and SMEs shape their individual and collective identities.

Several scholars (Murgatroyd and Calvert, 2013; Wenger, McDermott, and Snyder, 2002; and others) have noted that information gathering is a key area of concern in CoP Theory. Murgatroyd and Calvert (2013) explain that CoPs promote “collaboration, information exchange, and the sharing of best practices across boundaries of time, distance, and hierarchy.”

Compliance Gaining Theory. Compliance Gaining Theory focuses on how people attempt to get other people to change their behavior or to comply with them. While this name may initially suggest manipulation and negativity, Compliance Gaining Theory is not limited to such tactics. Compliance Gaining Theory is simply about getting someone to do what you want or need them to do, and includes methods that are sometimes beneficial to both sides. The difference between compliance gaining and persuasion is that compliance gaining targets actual behavioral changes, while persuasion looks primarily at changing attitudes. This theory will allow me to examine the efforts of both TCs and SMEs to gain compliance from each other, particularly through reciprocity, likability, and the consequences of non-compliance. Specifically, I will examine the influence of the Reciprocity Rule (Cialdini, 1984), which maintains that reciprocation can be a powerful device for gaining another’s compliance because it produces the feeling

of indebtedness. According to Hullet and Tamborini (2001), “When actors perceived the right to seek compliance, they expect positive responses from their targets (i.e., they expect compliance) (5).” Cialdini adds, “A person who violates the reciprocity rule by accepting, without attempting to return the good acts of the other is actually disliked by the social group” (45).

Another aspect of Compliance Gaining Theory was discussed by French and Raven (1959) when they were researching power, legitimacy, and politeness. Within compliance gaining, they identified five types of power: reward power, coercive power, expert power, legitimate power, and referent power. Compliance Gaining Theory will allow me to investigate the interpersonal and power dynamics that shape the ways in which TCs and SMEs work together. In addition, it will allow me analyze what type(s) of power apply to the working relationships between TCs and SMEs.

STUDY DESIGN AND PARTICIPANTS

In a deliberate attempt to develop a more diverse, complex perspective of the TC/SME relationship than what exists now in the TC scholarship, I designed my study to consist of two small-scale studies that allowed me to focus on the separate perspectives, experiences, and strategies of TCs and SMEs. I selected this method of data collection over a single in-depth case study because my goal was to examine multiple perspectives from multiple professionals in various industries. While one case study would have provided me with rich detail, it would have limited my findings to one organization that

may have represented just a single set of challenges or strategies. Observing perspectives, experiences, and strategies used in just one rhetorical context wouldn't provide me with as much new knowledge as my two-part study. Additionally, including enough representatives of each group (experienced TCs and SMEs) would have been difficult to find in one organization. The design of my study offered me greater opportunity to achieve a more complex perspective of the TC/SME relationship than has been gained so far in our scholarship.

I received Institutional Review Board (IRB) approval for all parts of this study and for all methods of data collection used in the study. The following describes my two small-scale studies:

Study A: Experienced Technical Communicators

In this study, I surveyed and interviewed seven seasoned TCs located in Illinois, Texas, and Ohio, each of whom had over ten years' experience working with SMEs. I selected six of these individuals based on my previous business or social contact with them. I selected the seventh based on the recommendation of another study participant. My criteria for all of the TCs was that each had attained the status of senior technical writer, or an equivalent or higher designation; and interacted on a regular basis with SMEs. The fact that I had previous contact with the majority of these participants was not a conflict of interest; rather it was insurance that my participants had the type of working experience that would allow them to fully participate in my study. Another factor that

led to my selecting (all but two of) these particular participants was that at some point in the past, we had discussed the sometimes-daunting task of working with SMEs. My suspicion was that these individuals would have opinions about this topic and be forthcoming in sharing information with me.

I chose seven participants for this study because seven allowed me to draw from a breadth of TC experiences and industries that a sample size of four or five would not. Seven participants allowed me to conduct a qualitative study that included a variety of job titles, industries, and locations. Limiting the study to seven participants also allowed me to access a depth of information and experiences from a manageable number of participants. Had I selected many more than seven participants, surveying and interviewing each participant twice would have been more difficult to accomplish in the same period, and additional participants would have provided little additional benefit to answering my research questions but would have unnecessarily expanded the scope or timeframe of the study. Table 1 shows the demographic breakdown of the TCs who participated in this study.

Demographic Information for Technical Communicators Participating in Study					
Participant #	Gender	Job Title	Current Industry	Location	Years Working as a TC
TC1	Male	Information Architect	Hardware/Software	Texas	21
TC2	Male	Manager of Service Communication	Manufacturing	Wisconsin	15
TC3	Female	Staff Technical Writer	Software	Illinois	25
TC4	Male	Senior Technical Writer/Application Specialist	Design and Construction	Illinois	22
TC5	Female	Senior Technical Writer	Software	Illinois	29
TC6	Female	Documentation Specialist	Government	Ohio	18
TC7	Male	Technical Documentation Specialist	Manufacturing	Wisconsin	12

Table 1: Demographic Information for Technical Communicators in Study

Study B: Experienced Subject Matter Experts

My second study consisted of surveys and interviews of eight Subject Matter Experts (SMEs) who work in California, Colorado, Illinois, Texas, and British Columbia. I selected these individuals based on my previous business contacts with them. Eight participants allowed me to conduct a qualitative study that included a variety of job titles, industries, and locations. Table 2 shows the demographic breakdown of the SMEs who participated in this study.

Demographic Information for Subject Matter Experts (SMEs) Participating in Study					
SME Participant #	Gender	Job Title	Industry	Location	Years Working with TCs
SME1	Male	Senior Software Architect	Software	Illinois	10+
SME2	Female	Operations Director	Restaurant Operations	Illinois	10+
SME3	Female	Commercial Therapy Manager	Medical	California	9
SME4	Male	Principal Engineer	Software	Illinois	10+
SME5	Male	Software Engineer	Software	Colorado	10+
SME6	Female	Operations Technology Manager	Restaurant Operations	North Carolina	10+
SME7	Male	Lead Consultant	Software	Illinois	10+
SME8	Male	Product Manager	Wireless Technology	Vancouver	8

Table 2: Demographic Information for Subject Matter Experts in Study

DATA COLLECTION AND ANALYSIS

To strengthen its integrity and reduce researcher bias (Porter, 2002; Sullivan and Spilka, 2010; Yin, 2009), I built both theoretical and methodological triangulation into my study. Using three distinct theoretical perspectives allowed me to approach and analyze the data from different angles and lessened the chance for limited or simplistic interpretations and explanations. The methodological triangulation of using both surveys and interviews helped me identify patterns and compensate for limitations of each data collection method. Since it was important to retain the diversity of geography,

industry, and participant for this study, methods such as observations, artifact collection, and focus groups were not viable options. To best add to the existing body of knowledge on the topic of the working relationships between TCs and SMEs, I used a combination of surveys and interviews to collect my data.

Surveys

Surveys allowed me to gather participants' initial thoughts on issues surrounding my research questions, and in the cases of the TCs, also gave me information on which specifics topics might yield the most qualitative data or encourage more comprehensive answers. Because some of my research questions involved comparing TC responses to SME responses, surveys were also useful in allowing me "to detect patterns within or across groups" (Spilka, 2010). Another benefit of using surveys was that they allowed participants to take breaks as needed, have more time to consider their responses, and provide answers at their convenience.

SME Survey. I asked the participants to complete one e-mail survey that consisted of 14 questions. All but three questions, which were demographic or asked for a definition, were intended to solicit the participants' attitudes and beliefs about their working relationships with TCs. All but two of the remaining questions were open-ended. Table 3 lists the questions I asked on the SME survey.

Survey Questions Posed to SMEs	
1	What is your current job title?
2	How many years have you been working with writers or instructional designers?
3	When you have been asked to serve as a subject matter expert in your career, what topics or types of knowledge have you been asked to share with others?
4	What is the goal of working with technical writers or instructional designers?
5	In a typical year, how often do you meet with writers or instructional designers?
6	List at least three qualities you LEAST appreciate in a technical writer or instructional designer and for each one, EXPLAIN WHY.
7	List at least three qualities you MOST appreciate in a technical writer or instructional designer and for each one, EXPLAIN WHY.
8	<p>Please check any of the roles below that YOU assume when you work with writers or instructional designers.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Providing information <input type="checkbox"/> Directing them to other sources of information <input type="checkbox"/> Training them <input type="checkbox"/> Writing <input type="checkbox"/> Revising or Editing <input type="checkbox"/> Giving advice <input type="checkbox"/> Giving guidance <input type="checkbox"/> Clarifying misconceptions <input type="checkbox"/> Managing them <input type="checkbox"/> OTHER (please explain)
9	<p>Please check any of the roles listed below that the WRITER or INSTRUCTIONAL DESIGNER assumes when you work with them.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Obtaining information from you <input type="checkbox"/> Asking for alternate sources of information <input type="checkbox"/> Educating you on their tasks <input type="checkbox"/> Learning from you about a situation, product, or service <input type="checkbox"/> Writing, revising or editing your writing <input type="checkbox"/> Interviewing you <input type="checkbox"/> Asking you questions <input type="checkbox"/> Giving you direction <input type="checkbox"/> Managing you <input type="checkbox"/> OTHER (please explain)
10	How do you define quality documentation?
11	Describe a SUCCESSFUL collaborative experience that you have had with a writer or instructional designer and explain why you found it to be successful.
12	Describe an UNSUCCESSFUL collaborative experience that you had with a writer or instructional designer and explain why you found it to be unsuccessful.
13	What do you think can contribute to problems some writers and instructional designers have in collaborating with subject matter experts?
14	What advice would you give to a new technical writer or instructional designer who will be collaborating with you or other subject matter experts?

Table 3: Questions Asked on SME Survey

TC Surveys. Participants completed two e-mail surveys. The first survey consisted of 13

questions. The first six questions were demographic. All of the remaining questions but one were open-ended. The second survey was distributed two months after the initial survey and contained six open-ended questions. It intentionally included one near duplicate question regarding challenges participants had in dealing with SMEs. The question was reworded and asked a second time in an attempt to solicit additional data. Table 4 lists the questions I asked on the first TC survey, and Table 5 lists the questions I asked on the second TC survey.

Questions Posed to Technical Communicators on First Survey	
1	How many years have you been working as a technical communicator?
2	What is your current title?
3	Are you currently an individual contributor or a manager of others? <input type="checkbox"/> Individual contributor <input type="checkbox"/> Manager of others
4	Select the industries where you have experience writing [<i>select all that apply</i>] <input type="checkbox"/> Computer software/hardware <input type="checkbox"/> Financial <input type="checkbox"/> Government <input type="checkbox"/> Healthcare <input type="checkbox"/> Manufacturing <input type="checkbox"/> Other [<i>please indicate</i>]: _____ <input type="checkbox"/> Other [<i>please indicate</i>]: _____
5	In what industry do you <u>currently</u> work?
6	What is your gender?
7	What are the three greatest challenges you face in working with Subject Matter Experts (SMEs)?
8	What are the three greatest challenges you face in writing to your audience(s)?
9	List 2-3 aspects of your current workplace environment that impact the quality of your work in positive ways:
10	List 2-3 aspects that impact the quality of your work in negative ways:
11	List 1-3 individuals from whom you have taken direction on projects during the past six months.
12	During the past year, for what audience(s) have you written?
13	During the past year, how often (if ever) did you interact with members of your target audience or end users? <input type="checkbox"/> Regularly <input type="checkbox"/> Occasionally <input type="checkbox"/> Rarely <input type="checkbox"/> Never

Table 4: Questions Asked on First TC Survey

Questions Posed to Technical Communicators on Second Survey	
1	How do you define quality in your professional writing work?
2	How do you measure quality in your professional writing work?
3	Does the organization for which you currently work have any formal mechanisms for measuring quality in writing?
4	List the three biggest challenges you have confronted in working with Subject Matter Experts (SMEs).
5	List up to three strategies you have used to successfully work with SMEs.
6	In your own opinion, what makes a good SME? Please briefly explain your response.

Table 5: Questions Asked on Second TC Survey

Interviews

I chose to conduct a series of interviews with my participants. Interviews allowed me to gain insight into my participants' thoughts, feelings, and actions on the topics of my research (Blakeslee and Fleishcher, 2007). In addition, interviews allowed me to ask follow-up questions (that I had not initially anticipated asking) to my participants' initial responses and to prompt participants to give more complete answers.

Interviews with TCs. I conducted a two-part, in-depth interview (Yin, 2009, 107) with each of the seven TCs in this study. I classify these as in-depth interviews because they took place over the course of two telephone conversations, and I used the TCs' insights from the first part of the interview to inform additional open-ended questions in the second part of the interview. The second part of interview took place three months after the first interview. This time span allowed me to analyze the data from the first part and to make appropriate modifications and deletions to the second part. It also

allowed participants time to contemplate additional stories and insights, reach out to others, and consider “other sources of evidence” (Yin, 2009, 107). As Yin explains, in an in-depth interview, some participants can be critical to the success because they may act as a type of “informant rather than a respondent” (107). Table 6 lists the sample follow-up questions I asked in these interviews. Additionally, I conducted a third part of this interview with TC4 and TC6 to learn more about their specific stories.

Sample Interview Questions Posed to Technical Communicators			
Interview #	Medium	Follow up to survey question (s#, q#)	Question
1	phone	s1, q7	What does “occasional prejudice” look like?
1	phone	s1, q7	What do you mean by “communicating”?
1	phone	s1, q10	Are the “reviewers” SMEs?
1	phone	s1, q13	What form does this “interface” with the internal development team take? Formal meetings? Ad-hoc meetings? Phone calls? Other?
2	phone	s2, q4	Can you describe the “difficulties with time management” you’ve encountered?
2	phone	s2, q5	What do you mean by “use psychology”?
2	phone	s2, q6	What does it mean to “appreciate the task of technical communication”?

Table 6: Sample Interview Questions Posed to TCs

The questions I asked during the first interview were directly related to the responses I received on the first surveys. For instance, on the first TC survey, I asked the following question: *What are the three greatest challenges to face in working with SMEs?* In

response to this question, TC6 wrote: Fighting the occasional prejudice that comes with being a technical communicator... Wanting more granularity around this response, asked the following follow-up question during the first phone interview: *What does occasional prejudice look like?*

Interviews with SMEs. Two months after administering the survey to the SMEs, I conducted a follow-up *focused interview* (Merton, Fiske, & Kendall, 1990) with SME5 and SME8 to gain more granularity around some of the examples they cited in the qualitative section of the survey. The responses to these interviews can be found, as quotes and vignettes, throughout Chapters Three and Four of this dissertation.

CODING AND ANALYZING DATA

Since my study was exploratory, I took specific measures to avoid arriving at pre-conceived ideas about my data. One measure was to revisit the data from each of my studies several weeks after I initially coded it. Sorting and revisiting my data increased the odds that I was being “open to the unfamiliar” (Dautermann, 1996, 253). As I reconsidered how to assemble and describe data, I recoded my data twice more to create more accurate and inclusive descriptors. Each of these iterations involved regrouping data and renaming codes to more clearly reflect the spirit of my findings. When possible, I employed in vivo coding, which involves choosing a word or short phrase from the actual language found in the data (Saldana, 2009). This allowed me to stay true to the intended meaning of my participants while organizing, analyzing, and

presenting my findings. Another measure I took to avoid pre-conceived conclusions was to maintain some contact with the participants during the coding, which allowed me to check my assumptions and more accurately analyze and code their responses.

CHAPTER 3: THE PERCEIVED ROLE, VALUE, AND POWER OF THE TECHNICAL COMMUNICATOR

For over a decade, technical communication scholars (Brady & Schreiber, 2013; Dannels, 2000; Kynell-Hunt & Savage, 2003; Schryer & Spoel, 2005; Walton, 2013) have examined the professional identity, visibility, and value of technical communicators (TCs). A key strand of this conversation has centered on the impact of the perceived (positive and negative) value of TCs. For example, the struggles TCs face with gaining greater visibility through showing the relevance and value of their work have been well-documented by various scholars (Anschultz and Rosenberg, 2002; Clark, 2006; Dicks, 2010; Faber and Johnson-Eilola, 2003; Kynell-Hunt and Savage, 2003; Redish, 2003; Savage, 2004; and others). Brady and Schreiber (2013) note that this visibility is “complicated by two overlapping factors: status (how others view and value the technical communicators’ role and work) and identity (how technical communicators view and value their own role and work)” (351). In this chapter, I will present my findings regarding the TC’s role, value, and power. I will start by describing my findings of the TC’s multiple workplace roles. I will then report how TCs exhibit hesitancy and difficulty defining their value to the workplace. Finally, I will explain the limited positional power and inconsistent show of respect that TCs report in describing their interactions with SMEs.

THE ROLES OF THE TCS AND SMES

This section looks in detail at the similarities and differences in how TCs and SMEs conceive of and define the role of the TC.

Overlaps and Divergences on What TCs And SMEs Define as the TC's Role

In my study, TCs and SMEs defined the role of the TCs in ways that sometimes overlapped and other times diverged. This result was expected due to the uncertainty that often joins the narrative surrounding the role of the TC. Many employers do not know exactly what a TC does, and Wilson and Ford's (2003) study found that role ambiguity or co-workers treating them as "glorified secretaries" or "grammar police" adds to the TC's workplace stress (151). At the same time, Hart and Conklin (2006) note that the role of the technical communicator has been expanding to "include participation in a wider variety of processes and teams" (405). My particular interest was on the reach of this expansion. Did SMEs widely perceive of TCs in terms of administrative help and proofreaders, or had their perceptions expanded from this limited view? Equally intriguing were the ways in which contemporary TCs perceived and talked about their role(s).

SMEs Perceive TCs as Information-Seekers and Educators

In my study, I asked SMEs to indicate their perceptions of the roles the TCs played in their working relationships. I listed several roles and asked SMEs to do the following:

Please check any of the roles listed below that the WRITER or INSTRUCTIONAL DESIGNER assumes when you work with them. Table 7 shows the number of SMEs that selected each role.

Roles of TCs – as Defined by SMEs										
	Obtaining information	Learning from you	Asking questions	Educating you on their tasks	Asking for alt sources of info	Revising/editing your writing	Interviewing you	Managing You	Giving you direction	OTHER: Giving you advice
SME1	x	x	x	x	x					
SME2	x	x	x	x	x	x	x	x	x	
SME3	x	x	x	x	x	x		x		x
SME4	x	x	x	x		x				
SME5	x	x	x	x		x	x			
SME6	x	x	x	x	x	x	x	x	x	
SME7	x	x	x	x	x	x	x			
SME8	x	x	x		x		x			
TOTAL	8	8	8	7	6	6	5	3	2	1

Table 7: Roles of TCs as Defined by SMEs

As Table 7 shows, every one of the eight SMEs I surveyed selected information seeking as a role they considered the TC to fulfill. The most frequently selected roles the SMEs attributed to TCs include *obtaining information*, *learning from you*, and *asking questions*. Another frequently-selected information-seeking role SMEs indicated that TCs played was *asking for alternate sources of information*, which was selected by 6 of the eight SMEs. One SME articulated the role of the TC in the following description of what he saw as the typical TC/SME relationship.

My goal of working with technical writers is to explain to them the new features created for a new release of the product. The technical writer needs to understand how each feature works and the technology behind each feature in order to clearly document this in the product user guide

and to explain it in a way that makes it understandable to people with varying levels of knowledge about the product. –SME1

This description shows a clear delineation of roles in which the SME is depicted as the “owner” of information and the TC as “massager” of that information. In another clear delineation of roles, SME4 explained that his goal in working with TCs was to ensure technical accuracy. The remaining six SMEs did not include this delineation when they described their goal of working with the TC. All SMEs indicated that the goal of working with TCs was to create deliverables (documentation). Five of the eight specified that the goal included making these deliverables easy to use.

When it came to information seeking, a surprising distinction arose in the SMEs’ definitions of *asking questions* and *interviewing*. While all eight of the SMEs in this study considered the TCs’ role to include asking them (the SMEs) questions, only five of these SMEs considered the role of the TC to include interviewing the SMEs. This disparity between two seemingly identical roles indicates that at least some SMEs see a difference between asking questions and interviewing. A possible explanation for this discrepancy could be that SMEs considered “interview” a more formal designation that they interpreted as not allowing for the give and take of conversation, and “asking questions” as more casual exchanges that involved fuller discussions. From this viewpoint, some SMEs perhaps felt that they were not participating so much in formal interviews as they were in informal discussions. Perhaps there is something else at play

here. It does raise questions, however, about different approaches to information gathering and which ones seem to work best between TCs and SMEs and why.

Seven of the eight SMEs selected *educating you on their tasks* as a role that the TC fulfilled. The frequency with which participants selected this role was unexpected and suggests that TCs must be equipped to effectively articulate their role(s) in the workplace. One SME described an initial interaction with a TC as follows:

I had always written my own instruction manuals and hadn't gotten any complaints. I wasn't sure that the technical writer was going to be able to do much to improve my work. Amy was very interested in seeing what I had written in the past. She complimented my manual and asked how I made decisions about organization and how much detail to include. She asked about the audience of the manual and asked if they might benefit from some additional information like FAQs. She had some suggestions for organization and layout, and I said she could give it a try. I liked what she did, even agreed with some sections she cut, and I felt comfortable working with her. –SME8

In this story, the TC indirectly communicated her ability to construct a rhetorical analysis for the SME's material. By asking the SME about his organization and content decisions, the TC indicated an attention to audience, context, and purpose. This line of questioning would also serve her later when she came back to the SME and suggested cutting some of the denser (and likely unnecessary) content. By suggesting additional types of content (FAQs), she evidenced that she was again considering the needs of the audience. By offering alternative layouts, she proved herself to be aware of the importance of visual rhetoric. At the end of the story, the SME does not call out the specific skills sets or value of the TC, but it is clear that the result of her approach, which including suggesting

what she could do for the SME, resulted in a productive, mutually respectful partnership. The role of revising and editing the SMEs' work was selected by six of the eight SMEs, suggesting that administrative/proofreading remains a task that SMEs largely associate with the role of a TC. However, it is notable that not all SMEs in this study considered administrative/proofreading as a role necessarily carried out by the TC.

TCs Describe Their Roles as Information Gatherers, Translators, and Audience

Advocates

The TCs in this study largely defined their roles in terms of gathering information from SMEs and translating information into "user-friendly" content that takes into account the specific needs of their audiences. Several scholars (Murgatroyd and Calvert, 2013; Wenger, McDermott, and Snyder, 2002; and others) have noted that information gathering is a key area of concern in Community of Practice Theory. Murgatroyd and Calvert (2013) explain that communities of practice promote "collaboration, information exchange, and the sharing of best practices across boundaries of time, distance, and hierarchy (381)." One TC in my study described his role as information-gatherer in these terms:

In a nutshell, my job is to find out as much as I can about the product and then describe it to the user. This usually means talking to the SME quite regularly and reviewing any other existing documentation that I can get my hands on. Sometimes I can get the product specification sheets and sometimes I can get a look at the prototype. I see myself as a sort of detective. –TC7

This description closely resembles what Slack, Miller, and Doak (1993) refer to as the transmission view of technical communication. In the transmission view, meaning is fixed, and it moves from origin to destination. This harkens back to the linear models of communication (Berlo, 1960; Schramm, 1954), in which the sender or source transmits a message to a recipient through a particular channel. TC2 considers his job to find information not only from the SME, but also from any other available source. In this dialog, the TC does not indicate that his role includes any type of negotiation or even translation of meaning. However, I propose that the transmission view and the translation view are not mutually exclusive as they relate to the role of the TC. Of the seven TCs who discussed seeking information from SMEs, six also described translating complex or technical ideas into what TC4 describes as *“easy to understand and digest.”*

Despite calls by scholars to move away from the paradigm of translators (Dicks, 2010; Slack, Miller and Doak, 1993; and others) and toward that of creators of knowledge, TCs still largely describe their role in terms of translating technical jargon into layperson’s speak and do not describe themselves as creators of knowledge. Slack, Miller, and Doak (1993) suggest that the field still struggles against this translation view because the encoding/decoding model limits our understanding of the full contributions of the technical communicator. The articulation view, which Slack et al. (1993) describe as the process of articulating and rearticulating meaning and the power struggles inherent in these, was not specifically suggested by any of the TCs in this study. However, one SME did suggest this process when he described a frustrating partnership with a TC who pushed back on the information the SME provided.

I've had a couple of writers who would ask for a change of some specific text. That's not a problem. But in this case, after I'd change it, they would be unsatisfied and keep iterating changes on the same text – even to the point of asking it to be changed to its original value on the third plus iteration. When I pointed out that they changed the meaning, they would argue the point ad infinitum. Using proper terminology is important. It can be difficult to use “jargon” – but the jargon usually was invented to make it very clear what the distinctions are between similar items that may appear identical to an outsider. –SME7

This story illustrates one view of the negotiation of meaning and power. Unfortunately, we only have the SME's viewpoint on this particular situation, and this view is clearly a negative response to the process. If the TC in this story were available to interview, it would be interesting to ask the TC how she interpreted these rewrites and their implications for negotiations with the SME. The TC might have had similar feelings of discomfort or irritation at the process. It is also possible that the TC might have simply seen these exchanges with the SME as part of the process of creating meaning.

While the TCs in this study did not indicate participation in anything resembling this articulation view of technical communication, this omission cannot be interpreted as indicating that they, do not feel similarly to SME7, who is on some level aware of the “processes of disarticulation and rearticulation” of meaning and the power struggles involved in these (Slack, Miller, and Doak, 1993, 39).

The TCs in this study also considered themselves advocates for the audiences of their technical documentation. When TC3 described a “good” SME, he included the following:

This SME knows the importance of user documentation and will put in the time it takes to give you the information you need to write thorough and easy to understand help topics. They need to make sure that they provide to you all of the information that would be helpful to the user when using the product, including information that the writer would not think of adding unless prompted by the SME.

Twice in this quote, the TC refers to the audience: once mentioning the goal of easy-to-understand documentation and then noting the importance of helpful and complete information. The identity of being audience advocates was a constant throughout this study. In fact, adding value to end-user documentation was the primary value that TCs described when articulating their value.

THE VALUE OF TECHNICAL COMMUNICATORS

As the literature review indicated, TCs are in a somewhat unique position in that many others in the workplace do not understand the value the TC brings to the organization. In some cases, coworkers cannot even articulate the role of the TC. Brady and Schreiber (2013) suggest that TCs are challenged because to succeed in corporate environments, they must continuously explain their value to co-workers and bosses and must also begin to represent themselves and their work as dynamic. If TCs do not or cannot articulate their value, there is a likelihood they will be seen as a nuisance to the SMEs, unnecessary to the product development and implementation process, or simply expendable “overhead” to the department and organization.

To gain the cooperation and respect of their SMEs, the SMEs in my study suggest that TCs learn to articulate and use their value during collaborations. In response to a question asking SMEs what advice they would give to TCs, SME 2 responded, *“Provide your expertise and value to the process.”* SME3 added, *“consider how to add maximum value to project based on your expertise and be sure to emphasize those things.”*

TCs Report Adding Value to End-User Documentation and to The Organization and Department

The TCs in this study noted six areas where they provide value, and the majority (all but one) of these responses fall under the category of adding value to end-user documentation. Fewer participants responded to the question in terms of adding value to particular contexts: The second most cited response (n=3) by the TCs was that they add value to the organization for which they worked. Two TCs noted that they add value to the department for which they work. Only isolated participants mentioned adding value to particular efforts or types of employees at their organization: One TC mentioned adding value to product development; one to SMEs; and one to other TCs. Figure 1 shows the number of responses attributed to each of these categories. Table 8 further shows which TCs cited each of the areas where they indicated they add value.

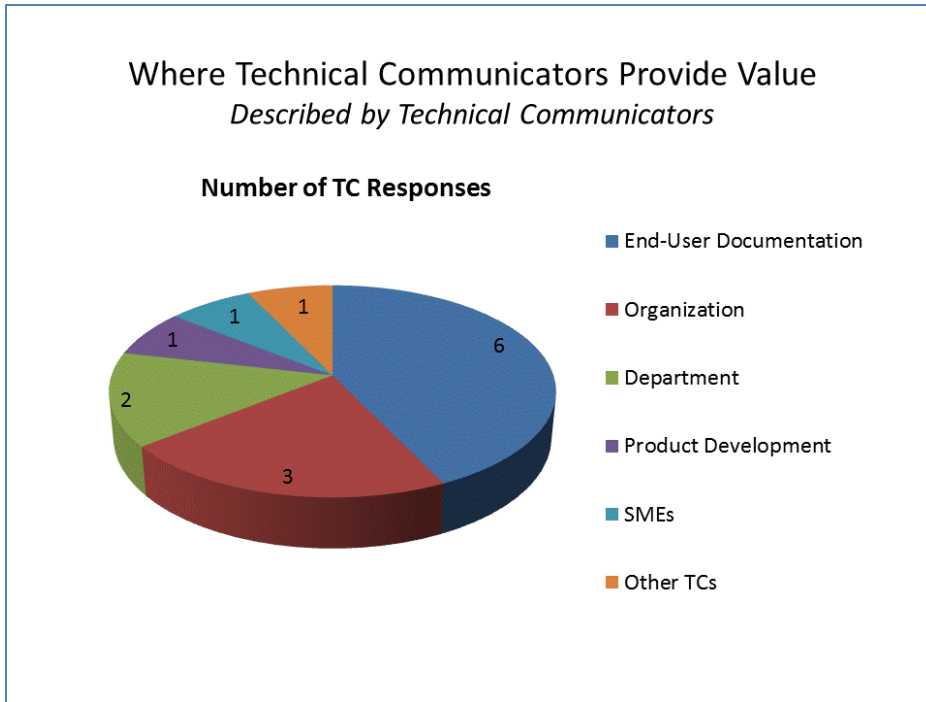


Figure 1: Places Technical Communicators Indicate They Add Value

Where TCs Indicate They Provide Value – by TC by Topic						
	End-User Documentation	Organization	Department	Product Development	SMEs	Other TCs
TC1						x
TC2	x	x	x			
TC3	x			x		
TC4	x					
TC5	x	x				
TC6	x				x	
TC7	x	x	x			
TOTAL	6	3	2	2	2	2

Table 8: Areas Technical Communicators Indicate They Provide Value

End-User Documentation. Six of the seven TCs indicated that they add value to documentation. This category is comprised of such skills as writing clear instructions, paying attention to detail, having and applying a user’s perspective, and providing high-quality deliverables. As TC4 explained, *“I communicate and teach complex or technical ideas so that they are easy to understand and digest.”* TC6 adds, *“I provide my expertise (writing, grammar, etc.) and see my value in my perspective -- I am the fresh set of eyes looking at the documentation .”*

Organization. Less than half —only three of the seven TCs— discussed adding value to the organization. These responses indicated having an impact on such outcomes as customer loyalty, brand equity, and protection from liability. As TC2 explained, “[We] build...customer loyalty leading to repeat business...allowing the company to sustain itself going forward.”

Department. Just two of the seven TCs discussed adding value to their Department. This category includes developing systems and processes for the department. For example, TC7 describes “having developed the technical documentation area from the ground up” and “putting workable systems in place.”

Other. The other places TCs noted adding value were in product development, SME relationships, and assisting less-experienced TCs. TC3, for instance, noted, “I can provide input in user interface design, providing both suggestions for improvement to existing designs and providing design input for new features.” TC6 cited her experience working with SMEs as a value. TC1 explained that he is able to assist other TCs because many of them “are either less experienced or not familiar with the tools and processes that we use.” These relationship skills, although not mentioned specifically as a value they add, were discussed by TCs in terms of being necessary in successful working relationships with SMEs. This confirms that at least a handful of the participants would agree with the finding of Hart and Conklin (2006) that TCs add value in the processes they manage, the relationships they create, and their diverse skill set (412).

These findings indicate a strong focus by TCs on the end product and end users and not much awareness or recognition that they also add value in other ways. In other words, TCs seem to consider their role primarily as one of contributing to the product/audience at the end of the process, and not so much as contributing to the process(es) and relationships that happen before the end point. This is significantly different from the focus the SMEs want the TCs to have in building relationships and becoming involved with the technology.

TCs' Discomfort Articulating Their Value

As Johnson-Eilola notes (2004), TCs often perceive their work as static, rather than dynamic and by doing so, they tend to promote their value in limited ways (187). My study confirms that this interpretation is still valid. When asked about the value they contribute, the TCs in my study provided answers that showed a limited understanding of their own value as it applies to organizational contexts or employees within these contexts.

When asked what value they see themselves bringing to their department or organization, four of the seven TCS in this study indicated uncertainty or discomfort with this question.² This is notable because no other question in my interviews or surveys with this group produced as much hesitation as this one. Table 9 shows the

² The exact wording of the question I posed to the TCs was "*What value do you bring to your organization or department? (What is it that you DO or CAN do to add value?)*"

phrases that accompanied four of the answers to the question of “What value do you bring to your organization or department? “

**Technical Communicators
Defining Their Value**

Phrases Indicating Uncertainty or Discomfort	
TC2	<i>Is that what you're looking for?</i>
TC3	<i>That is kind of a vague question, but I'll try.</i>
TC4	<i>I hate what I just wrote.</i>
TC5	<i>This is a tough question to answer.</i>

Table 9: TCs' Expressions of Uncertainty or Discomfort in Defining Their Value

These phrases are significant, because they not only suggest uncertainty or discomfort with the TCs' answers regarding the value they brought to their organizations or departments, but also indicate that the participants are looking for validation, hedging their responses with a caveat, or negatively judging their own answers. This data illustrates that even within the ranks of experienced TCs, there is a notable amount of anxiety around articulating the value of TCs. One reason this finding is significant is that the impact of such anxiety and insecurity could have direct ramifications for their working relationships with SMES and their ability to successfully complete their

documentation tasks. This finding suggests that TCs who cannot or do not express their value may adversely affect their relationships with their SMEs or other team members.

POWER AND RESPECT BETWEEN TCS AND SMES

One of the most common assumptions in TC literature is that TCs have little power in their relationships with SMEs. My study found that there is typically not a top-down power relationship between SMEs and TCs. Stated another way, SMEs do not have Legitimate Power, which is based on formal rank or position (French and Raven, 1959), over their TC counterparts. However, SMEs likely have what French and Raven refer to as Expert Power, which is based on the perception that they possess greater information, knowledge or expertise. SMEs also have Informational Power (Raven, 1990), which is described as the ability to limit or share information, over TCs.

Respect is another issue with which TCs sometimes struggle. In their research, Lee and Melenbacher (2000) found that many writers feel that some SMEs do not respect the TC's role in the documentation process, and some SMEs seem to be unaware of or disinterested in the documentation process altogether. My study similarly found that TCs sometimes feel as though their SMEs demonstrate a lack of respect for them.

SMEs Possess Expert Power and Informational Power/TCs Exert Reward Power

Cialdini (1984) explains that organizations are social, as they promote and reinforce the concept of obedience to authority. We are conditioned from a young age to comply with

our parents, who have more knowledge than we do and who control our rewards and punishments. This compliance thus benefits us, and we learn that the positions of authority figures “speak of superior access to information and power, [and] it makes great sense to comply with the wishes of properly constituted authority (211)”. Cialdini goes on to explain that titles also connote authority. He gives several examples in which titles such as doctor, security guard or professor suggest authority, and people become more accommodating to individuals with such titles or dress. Engineers, software developers, and operations directors are all titles that arguably hold some type of power. It is possible that TCs interacting with such people become more compliant and accommodating and less direct, less inquisitive, and less assertive.

Despite the implied power dynamics between TCs and SMEs, my study found that most SMEs (n=6) do not consider it their job to actively manage the TCs with whom they work. Only two of eight SMEs indicated it their role to manage the TC. Interestingly, these same two SMEs were among the three SMEs who considered it the TC’s role to manage them (the SMEs). Table 10 shows the SMEs who consider their role to include managing the TC, and Table 11 shows the SMEs who considered themselves to be at some point managed by TCs. This might suggest that the two SMEs who described their role as both managing and being managed by the TC considered their relationship with the TC as peer-to-peer rather than hierarchical (with SME as manager). Alternately, this could suggest that power can shift according to the project – in some situations, TCs might be managing projects; in others, SMEs might be managing projects. This potential

shifting of power suggests that the TC/SME relationship might be much more fluid and dynamic and contextual than the scholarship has suggested to date.

Roles of SMEs – as Defined by SMEs										
	Providing information	Directing TCs to other sources of information	Clarifying misconceptions	Training TCs	Revising or editing	Giving guidance	Giving Advice	Writing	Managing them	OTHER:
SME1	x	x	x	x	x	x	x			
SME2	x	x	x	x	x	x		x	x	
SME3	x	x	x	x	x			x	x	
SME4	x	x	x	x	x	x	x	x		
SME5	x	x	x	x	x	x	x	x		
SME6	x	x	x	x	x	x	x			
SME7	x	x	x	x		x	x			
SME8	x	x	x		x					
TOTAL	8	8	8	7	7	6	5	4	2	0

Table 10: Number of SMEs who Consider Their Role to Include Managing TCs

Roles of TCs – as Defined by SMEs										
	Obtaining information	Learning from you	Asking questions	Educating you on their tasks	Asking for alt sources of info	Revising/ editing your writing	Interviewing you	Managing You	Giving you direction	OTHER: Giving you advice
SME1	x	x	x	x	x					
SME2	x	x	x	x	x	x	x	x	x	
SME3	x	x	x	x	x	x		x		x
SME4	x	x	x	x		x				
SME5	x	x	x	x		x	x			
SME6	x	x	x	x	x	x	x	x	x	
SME7	x	x	x	x	x	x	x			
SME8	x	x	x		x		x			
TOTAL	8	8	8	7	6	6	5	3	2	1

Table 11: Number of SMEs Who Consider the TC's Role to Include Managing the SME

While TCs in this study did not indicate having power, per say, there was some indication that two of the TCs exerted Reward Power in their compliance gaining with SMES. Reward Power (French and Raven 1959) can consist of something as simple as a smile or a compliment, or they can involve more elaborate praises, such as those described by TC6, who explained that she has used flattery or “played dumb” (presumably resulting in the SME feeling “smarter”). Similarly, TC4 could be said to have used Reward Power with his strategy of “getting to know SMEs on a personal level (through use of humor or other means).”

TCs Report Some SMEs Lack Patience and Respect

Three of the seven TCs in my study indicated that one challenge they face in working with SMEs is a lack of respect. These TCs mentioned the following challenges:

- *Gaining respect and trust from SMEs - An SME needs to be able to trust the writer's instincts, abilities, and design/writing choices. –TC4*
- *Developing their respect for what I do in terms of adding value to the product. –TC5*
- *Fighting the occasional prejudice that comes with being a technical communicator whose degrees are in English and Composition rather than having a Bachelor of Science in whatever field the SME values most. –TC6*

While three of seven may not initially seem high, keep in mind that these participants are all experienced TCs who have probably earned a certain amount of respect by virtue of being in their field for ten, twenty, or more years. Future research could look at more mixed groups of TCs who have various levels of experience to determine if less-experiences TCs perceive an even greater lack of respect from their SMEs.

Lee and Melenbacher (2000) found that many writers feel that some SMEs do not respect the TC's role in the documentation process, and some SMEs seem to be unaware or disinterested in the documentation process altogether. One TC in their study noted, "[Some SMEs] think I'm stupid just because I'm not a programmer" (546). Another TC in their study noted SMEs who were condescending and used inflated language to explain easy concepts. Winsor (1993) explains that SMEs often don't value documentation because they feel that meaning is somehow "*encoded*" in the

technology itself, and they “*see their products as speaking for themselves*” (188). My study also found that TCs have experienced what they consider to be impatience and a lack of respect from their SMEs. One TC recounts the following story:

I have to write a manual documenting complex system/equipment that we are shipping this week to a major customer. One of the requirements for the system is the manual, which is to include information about troubleshooting, repair, and replacement parts. The project engineer had been ignoring my requests to meet with him for weeks. I finally cornered him last night with my questions. As I flipped from page to page, sticky note to sticky note, trying to make sure that I got to fill in all of the gaps in my document, he stood there glaring at me. He acted miffed that I was taking his precious time and gave me monosyllabic answers. Our equipment can literally chop someone’s hand off – and yet he doesn’t feel that the repair and troubleshooting is worth his time to verify what I’ve written. –TC6

Besides providing an example of an SME who is elusive and seemingly unwilling to share his time, this story illustrates a lack of respect for either the documentation process, the TC, or both. The TC’s attempt to get answers to her questions were warranted as the manual was a *requirement* of the system/equipment. However, both the SME’s non-verbal cues (*glaring* and *acting miffed*) and his discourse (giving monosyllabic answers) suggest a dismissive attitude toward the TC and her task. The importance of the precision of the documentation and the potential consequences of this documentation’s inaccuracy were particularly catastrophic (the equipment could chop someone’s hand off). Yet, the SME, who was also the product engineer and presumably had a stake in the success of this project did not express the same level of concern as the TC regarding documentation that could prevent end-user injury and potential company liability. Other explanations for the project engineer’s attitude may have been that the TC wasn’t

articulating her concern over the potential catastrophic consequences of erroneous or incomplete documentation or a lack of patience at the TC's process of moving from one sticky note to the next. However, these failings or processes on the part of the TC could easily be attributed to a "last-ditch effort" to acquire information from the SME.

SUMMARY

This chapter described that TCs consider their roles to largely consist of obtaining information and crafting that information into a form that is easy to comprehend for the end-user or audience. This chapter also considered the ways in which TCs conceive of and talk about their value. While half of the TCs in this study expressed some hesitation in discussing the value they brought to their departments or organizations, six of seven indicated that they brought value to the end-user documentation. Almost half also considered that they added value to their departments (n=3) and/or organizations (n=4). Most of the TCs seemed exclusively focused on the final deliverable: the end-user documentation. None of the TCs explicitly stated that they added value in terms of building relationships, and only one noted his value in creating processes. Additionally, this chapter looked at the limited positional power and inconsistent show of respect that TCs reported in describing their interactions with SMEs.

CHAPTER 4: THE COMPLEXITY OF THE TC/SME RELATIONSHIP

Common assumptions in the field are that workplace issues stem from SMEs not having the time to work with TCs, and TCs struggling from having little positional power within the organization. While my research confirms the relevance of these issues, it also uncovers a complexity in the TC/SME relationship that includes both benefits and difficulties. This chapter covers the workplace relationships of TCs and SMEs, and moves beyond the rudimentary and limited conclusion that these relationships are difficult and contentious. It expands upon the struggles and uncovers aspects of TC/SME partnership that each group appreciates. In this chapter, I explain the attitudes, skills, and behaviors that TCs and SMEs report as helpful in their counterparts and those that they consider detrimental. I also discuss the similarities and differences in how TCs and SMEs characterize such issues as:

- *productivity, autonomy and accessibility*
- *audiences and contexts*
- *technical knowledge*
- *professionalism, respect, and trust*
- *communication practices*

COMPETENCIES AND SHORTCOMINGS REPORTED BY TCS AND SMES

This section of the chapter presents the categories in existing TC literature of competencies SMEs find desirable in TCs, and those that TCs find desirable in SMEs. It

then introduces more detail for these categories and proposes additional categories as suggested by the results of my study.

Desirable TC Competencies from the SME Perspective

Since the tasks of TCs vary from context to context, we might assume that the particular skill sets they need might vary as well. However, my study found that SMEs in diverse industries (including software, retail, operations, medical, and mobile workforces) largely cited the same competencies they discovered in TCs. These competencies range from “soft” skills such as expressing an interest in learning and relating well with others to technical knowledge and project management skills. When asked to define a good TC, SME4 in my study noted, “*Curiosity—or at least a mild interest in the subject matter—can go a long way.*” Likewise, Lee and Melenbacher (2000) conclude from their research that there is a dramatic contrast in perspective between the enthusiastic and unenthusiastic learners, the latter of whom seemed more concerned with receiving verification from the SMEs that documents were accurate and complete than with learning about the product.

An initial taxonomy for attributes SMEs appreciate in TCs was provided in 1991, when Walkowski surveyed 16 software engineers and identified five categories of skills and knowledge that these SMEs consider critical for TCs to have: *Technical Knowledge, Writing and Language Skills, Communication, Attitude, and Professionalism.*

Initially, these categories appeared to provide a sufficient framework by which I could examine my own findings. But there were a few problems with this taxonomy, starting with how Walkowski defined the categories themselves. *Technical Knowledge*, as defined by Walkowski, included not only having a fundamental knowledge of the subject matter, but also asking questions of the SMEs. As Walkowski explained, “a startling frequent comment [of SMEs] was that writers don’t ask enough questions” (65).

Although there is a clear connection between asking questions and gaining technical knowledge, the act of asking questions would have been categorized more accurately in her taxonomy as a *Communication Ability*, rather than a technical skill. Her next two categories, *Writing and Language Skills* and *Communication Ability*, are faultily disconnected in that writing and language skills are, in fact, types of communication skills. In what could be a more comprehensive category, *Communication Ability* is limited by Walkowski to the ability to articulate problems and changes clearly to the SME and “communicating throughout the process” (66). At the same time, *Communication* is so all-encompassing that it does not provide much in the way of description. Walkowski’s category of *Professionalism* includes writers who take their work seriously, are dedicated to doing good work, work as team members, take responsibility, are flexible enough to work within constraints, and meet deadlines. This is a rich category with clear delineations from other categories. However, I would argue that the attributes Walkowski categorizes under *Attitude*: writers with condescending attitudes or writers who secretly wanted to be engineers themselves, should be included in the category of *Professionalism*.

Despite the limitations I’ve noted in Walkowski’s taxonomy, it is a helpful place to start in organizing data and analyses. My research confirms several, but not all of Walkowski’s initial findings. Additionally, my study provides more granularity around some of these existing categories and suggests the need for three additional categories. To better explain my specific findings, I am introducing a modified taxonomy for categorizing qualities that SMEs value in TCs.³ Figure 2 displays Walkowski’s and my modified taxonomies.

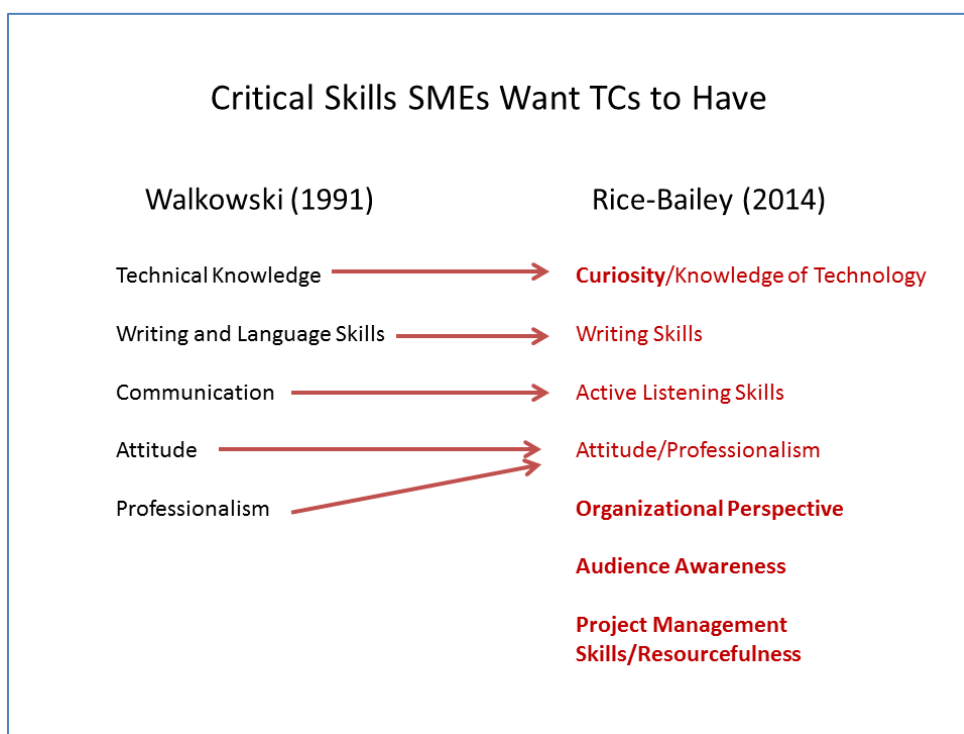


Figure 2: Original and Revised Taxonomies of Critical Skills SMEs Want TCs to Have

³ To comprise a category in my critical skills taxonomy, a skill had to be mentioned by more than SME, or if it was cited only once, it also must be cited as a category of collaborative concern in the following chapter. There were three “skills” that did not meet this criteria: *being intelligent* (SME3); *being creative* (SME6); and *being honest* (SME2).

Those categories that my study suggests be added to the taxonomy are *Organizational Perspective*, *Audience Awareness*, and *Project Management/Resourcefulness*. Table 12 shows the number of SMEs who indicate each of these skills in their descriptions of either or both of their most appreciated or least appreciated qualities of TCs.

I limited the parameters of and renamed Walkowski's *Communication Skills* category to *Active Listening Skills*. In addition, because she described her *Writing and Language Skills* category in a way that excluded oral discourse, I shortened this category to simply *Writing Skills*. Because a number of the SMEs in my study described technical knowledge in term of gaining technical knowledge and the curiosity involved in this discovery, I lengthened Walkowski's *Technical Knowledge* category to *Curiosity/Knowledge of Technology*.

As Table 12 shows, the most-cited critical skills for TCs to possess, according to the SMEs in my study, are *Project Management/Resourcefulness* and *Active Listening Skills*.

Critical Skills for TCs to Possess – by SME by Topic							
	PM Skills/ Resourceful	Active Listening	Curiosity & Knowledge (Technology)	Writing Skills	Attitude/ Professionalism	Org. Perspective	Audience Awareness
SME1		x	x		x		
SME2	x	x			x	x	x
SME3	x		x				
SME4	x	x	x	x			
SME5			x	x		x	
SME6	x	x		x		x	x
SME7	x	x		x	x		
SME8					x		
TOTAL	5	5	4	4	4	3	2

Table 12: Critical Skills for TCs to Possess by SME by Topic

Of the three new categories I introduced, *Organizational Perspective* and *Audience Awareness*, were cited by two and three of the eight SMEs respectively. A more compelling finding is that five of the eight SMEs indicated critical skills that were categorized under *Project Management/Resourcefulness*. What makes this notable is that while the majority of my participants suggest this as a critical TC skill, this category was not identified by previous work with SMEs. In fact, neither of the top two skills cited by the SMEs in my study were indicated in previous scholarship. In addition to the category of *Project Management/Resourcefulness*, *Active Listening Skills* was one of these top two skills, and it is a modified and restricted version of the more general *Communication Skills* introduced by Walkowski.

It is useful to examine these SME perspectives in terms of how they relate to the competencies TCs indicate are desirable in SMEs.

Desirable SME Competencies from the TC Perspective

To date, the closest we have come to answering the question: “What makes a good SME?” is Lee and Mehlenbacher’s (2000) listserv/corporate survey asking TCs how they felt about working with SMEs. One question Lee and Mehlenbacher asked their participants was, “What do you like about working with subject-matter experts?” (545). The researchers subsequently divided the answers into the following two categories: *Acquiring Information*, and *Interacting with People*. These categories are useful, but the details are somewhat problematic. Regarding TCs acquiring information, Lee and Mehlenbacher’s assessment was that “The majority of the writers seem to be enthusiastic learners” in that they enjoyed being introduced to new ideas, procedures, products and tools (545). Further, Lee and Mehlenbacher report that 17 of the writers indicated such enthusiasm, while seven did not. Because this comparison accounts for only 24 (of the 33) participants, it is unclear whether the remaining nine participants simply did not answer this question or answered it in a way that was unclear or off-topic. This is an important detail because if the question was simply unanswered by these remaining participants, the implication could be that the majority of TCs were actually *not* enthusiastic learners. What is a bit clearer is that some TCs enjoy the aspect of interacting with SMEs. However, what Lee and Mehlenbacher do *not* state is as interesting as what they do state. In their research, they found that “several writers also

reported that they enjoyed the personal interaction and teamwork involved in working with SMEs” (546). Here again, what of the participants who did NOT make mention of enjoying work with SMEs? Since the question posed to them was open-ended, we cannot assume that those TCs who did NOT mention enjoying the interpersonal interaction with SMEs did not enjoy their interactions. But it is noteworthy that simply “several” (not “the majority” or “all”) of the TCs mentioned enjoying personal interaction with SMEs. Still, the question remains: “Do TCs overwhelmingly enjoy or dislike working with SMEs?” Lee and Melenbacher also asked their participants, “What do you *dislike* about working with subject-matter experts?” (545). They divided these answers into the following three categories: *Time and Accessibility*, *Respect for the Documentation Process*, and *Communication Skills*. Some of my participants’ responses resonated with the responses Lee and Mehlenbacher’s participants gave to the question of what they liked about working with SMEs. Figure 3 shows the difference between Lee and Mehlenbacher’s implied taxonomy and my own.

However, several additional categories emerged from my data. While Lee and Mehlenbacher did not suggest a specific taxonomy of critical skills that TCs want SMEs to possess, their findings offer us some insight into a potential classification. Lee and Mehlenbacher found that *time and accessibility* was the category under which the majority of the TCs’ complaints fell. Some TCs in their study did note, however, that time constraints were often the result of conflicting deadlines. Lee and Mehlenbacher also include in this category SMEs “who did not inform [TCs] when changes to the product were made” (546). Because it involves the sharing of information, this point

would probably been better placed in their second category— *Communication Skills*.

The final category cited as an area of dislike for the TCs was SMEs’ lack of respect for the documentation process. Lee and Mehlenbacher’s implied and my modified taxonomies are pictured in Figure 3.

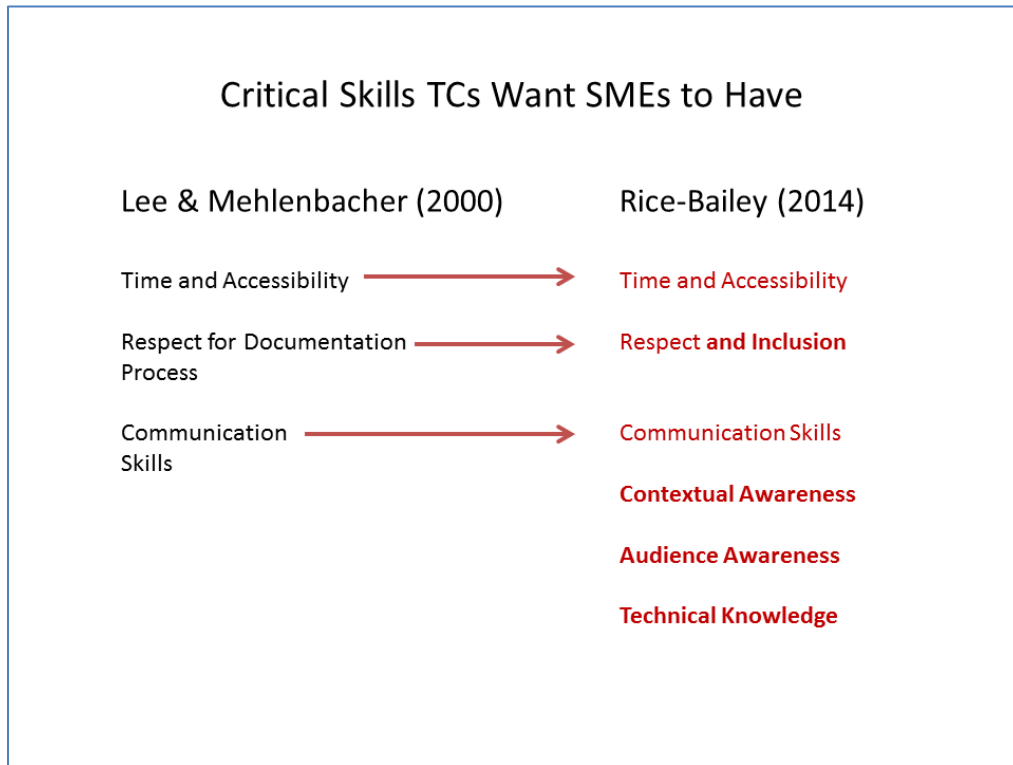


Figure 3: Comparison of Implied Original and Revised Taxonomies of Critical Skills TCs Want SMEs to Have

In addition to the initial categories of *Time and Accessibility*, *Respect for the Documentation Process*, and *Communication Skills*, my study found that TCs want SMEs to have *Contextual Awareness*, *Audience Awareness* and *Technical Knowledge*. *Contextual Awareness* includes familiarity with the subject at hand as well as the “knowledge of how that subject fits into the overall context of the product” (TC1) and “understand[ing] product lifecycle as well as product support” (TC2).

Table 13 shows the number of TCs who indicated each of these skills as factors in the descriptions of either or both of their most appreciated or least appreciated qualities of SMEs.

Critical Skills for SMEs to Possess – by TC by Topic						
	Time & Accessibility	Respect & Inclusion	Communication Skills	Contextual Awareness	Audience Awareness	Technical Knowledge
TC1	x		x	x		x
TC2				x	x	
TC3	x	x				
TC4	x				x	
TC5		x	x			
TC6			x			
TC7		x				
TOTAL	3	3	3	2	2	1

Table 13: Critical Skills for SMEs to Possess by TC

The first three categories on Table 11 were mentioned by three of the seven TCs in my study, which confirms the importance of the previously identified *Time and Accessibility*, *Respect and Inclusion*, and *Communication Skills*. New findings of my study are indicated by the final three categories: *Contextual Awareness*, *Audience Awareness*, and *Technical Knowledge*. *Contextual Awareness* and *Audience Awareness* were each noted by two of the seven TCs. *Technical Knowledge* was cited by one TC as a critical skill for SMEs to possess, which is noteworthy both because it was mentioned at all (the title Subject

Matter Expert implies technical expertise) and because it was not mentioned by all TCs (obviously, an SME without knowledge in his or her supposed area of expertise would definitely be a hindrance to TCs).

CHARACTERIZATIONS OF PARTNERING ISSUES

In the following sections, I will examine how the critical skills SMEs and TCs relate to and complicate each other.

Productivity/ Autonomy Versus Time/Accessibility

He...relied almost entirely on me for information.— SME3

I'm not invited to update meetings. Product documentation is always an afterthought.— TC7

According to my study, SMEs and TCs differ in their approaches to productivity and autonomy and to time and accessibility. One dichotomy that arose in my data is that SMEs espouse productivity and autonomy in TCs, but might not give TCs the time or information that allow them to be productive. This dichotomy is illustrated in the competing dialogs of the TCs and SMEs just above this paragraph. Project management skills (such as understanding time, resources and contingencies) and resourcefulness are the most frequently mentioned competencies that SMEs want TCs to possess to be productive. Five of the eight SMEs in this study noted the importance of these skills and their influence on the productivity or lack of productivity in the TC. For example, SMEs cited TCs, who, without much direction, were able to begin documenting new features of the product in the user guide (SME1); to minimize the amount of time the SME

needed to educate her (SME3); to produce initial documentation, so the SME did not have to start with a blank page (SME5); and to take the initiative to ask about the subject and end-user and to explain her process to the SME (SME6).

When describing TCs who were *not* as self-directed, SMEs detailed TCs who did not meet deadlines (SME2); who relied entirely on the SME for information (SME3); who asked the SME to write their own product documentation— which the TC explained she would then edit (SME5); who mistakenly thought they understood the information; and who didn't appear invested in the success of the project and had trouble understanding the business and technical concepts (SME7).

SME3 recalled a situation when she was working with an unproductive TC in a story that gives context to one of the quotes that began this section:

I hired Brian to write a report on a research study. He hadn't been involved in the project to date and I don't believe had much experience with reporting on similar studies. He also relied almost entirely on me for information. I had to spend so much time informing him and then dramatically editing his report draft that I questioned whether it would have been faster to do it myself.

In this story, the SME attributes failures in the collaboration to failed attributes of the TC. She notes that the TC lacked project background and background with the report genre; he did not seem to work independently (*relied almost entirely on me for information*); and his report draft required radical editing. This story is problematic in a few ways. To start, the SME notes that Brian was not previously “involved in the

project.” Whether he was new to the team or simply not invited to project meetings, clearly, Brian had a deficiency of knowledge. The SME does not mention bringing Brian “up-to-speed” on any project background information. Not having this background would immediately put Brian at a disadvantage. The second problem is that the SME noted that Brian relied “almost entirely” on her for information, and she had to spend “so much time informing him.” Since the role of the SME is to provide information, it is troubling that this SME expressed these attitudes toward providing information to the TC. In defense of the SME, she might have mentioned other sources that Brian could have used for reference, and he might have chosen still to go to the SME for this information. However, this detail is not included in the SME’s story, so it is difficult to say for sure that Brian’s lack of productivity was due to his lack of resourcefulness or due to a lack of knowledge. In addition, if Brian were new to the team or to the organization, he may not have been aware of any alternate resources (for information) that might have been available for him, and perhaps would have rendered him more “productive.”

TCs collaborating with SME’s have cited the situation of SMEs withholding time and information as a challenge, a finding that confirms what the scholarship has previously reported. In fact, Lee and Mehlenbacher found that TCs’ biggest complaint about SMEs was that they did not give them much time or did not inform them when changes were made to a product (546). The TCs in my study describe their specific time and accessibility needs as being given sufficient amounts of time to ask questions (whether through face-to-face conversation, text, e-mail, or instant chat); SMEs responding to the

TC's requests in a timely manner; and SMEs being thorough in answering the TC's questions. The need for SME time applies both to time spent giving TCs information and time spent reviewing the TCs' interpretations or drafts of that information. As TC3 explains, *"a good SME...will put in the time it takes to give you the information you need to write thorough and easy to understand help topics.* TC4 adds that, *"[A good SME is] one that takes the time to read the writing."*

My study also showed that TCs are quite aware of the time limitations of their SMEs, and many TCs find ways to mitigate this issue. TCs realize that SMEs have time constraints, are in high demand, and have conflicting priorities, and that these facts make SMEs sometimes seem elusive. As I covered in the previous chapter, not being available for the TC can sometimes be indicative of an SME who lacks understanding or respect for the documentation process. Representative comments in my data regarding the time and accessibility of SMEs include the following:

- *TC1— Subject Matter Experts are often in high demand which makes it difficult to schedule meeting times and gather information.*
- *TC3— If they are in a hurry, they may answer only some of your questions or may not understand what you are asking.*
- *TC6— SMEs are so busy with their "real work" and in meetings that it's difficult to get time with some of them.*

Time and information from SMEs allows TCs to be productive. Sometimes this information takes the form of discourse; other times it is shared in texts. SME4 recounts a situation in which he managed to be productive despite the unavailability of his SME.

I recently received a request to include a link to a PDF of the latest version of United States National CAD Standards codes manual on our intranet. The SME provided me with the license code that provided initial access to the NCS website registration process where I could view a Web version of the manual, but it was not downloadable. I e-mailed the SME about this problem and asked if she had a hard copy of the document that I could scan. I waited a few days and did not get a reply, so instead of bugging the SME again, I decided to complete a test registration of the process so that I could view the web version of the CAD Standards and take screenshots of the process as I completed the steps. It was a cumbersome process. Ideally, I would have been provided a clean PDF from my SME that I could post it on our intranet. Because I did not receive that PDF, the next best solution was to show staff how they could complete the registration process to view the web version of the manual. I did this by creating an HTML page on our intranet that showed the registration process using my screenshots.

In this situation, the TC was not given sufficient information (via discourse or text) from his SME to complete his task. When he encountered his first problem (the document was not downloadable), he decided to find a solution on his own. His initial idea was to scan an existing hard copy to create a pdf. But then he encountered a second problem - the SME did not answer his e-mail. In response to this problem, he had to come up with yet another solution. While he could have waited and been dependent on the SME, he instead acted proactively and creatively to obtain a copy of the CAD Standards by completing a registration process himself.

Certainly, not all SMEs withhold time or information from TCs. And it is likely that the act of withholding is quite often an omission of action rather than an active commission. Following are two examples of what were described as successful TC/SME collaborations— one told by an SME, the other by a TC. Both stories include the

willingness of each party to spend time with, provide detailed information to, and maintain regular interaction with the other. First, SME1 shares a success story that illustrates his own active involvement with the TC.

A successful collaborative experience I had was on a new release of my product. I prepared a Power Point presentation of all the new features in the release. I first went through this presentation with the technical writer and then after the presentation provided a live demonstration of the new features. From that presentation and live demo, the technical writer was able to begin the process of adding these new features to the product user guide. Some questions came up during the process of documenting these new features, but we worked through those. It was a very positive experience and very few edits were needed during the final review of the user guide. — SME1

This story illustrates the positive effects of an SME who is not only accessible, but also willing and able to provide a thorough presentation and demonstration to his TC. In my own experience, and in the experience of many of my peers in industry, the extent of background provided by this particular SME is atypical, but not entirely unique⁴.

The second story illustrates a bit of a reversal. This time, it is the TC who provides time and information to the SME. SME6 recounted the importance she placed on her TC spending time with and asking her questions.

The writer/designer spent about two hours up front with me asking me about the subject and the end user. She also explained to me the process she was using and scheduled time with me for the future check points. At each check point, she again asked clarifying questions to ensure she was on track and wasn't missing anything. She got feedback and completed

⁴ SME1 has a brother who worked as a TC for several years, and at one point in their careers, they worked for the same software company. It is quite possible that they discussed practices that would help make the task of the TC easier, and the result was an SME who had an unusual appreciation for the job of a TC.

testing of the project on end users. She was very open-minded not only to information but also to how to keep the learner engaged. — SME6

This story describes a successful collaboration as one that includes positive interactions between the TC and SME and proactive action on the part of the TC. The interaction includes the TC both asking questions of the SME and providing the SME with information about the TC's own process. This interaction also indicates a consistency of action on the part of the TC (At each check point, she again asked clarifying questions...) and a perceived openness and flexibility about how the TC managed and used information. The proactive action (She got feedback and completed testing of the project on end users) suggests a belief of the part of the SME that the TC was also thorough in the work she performed while working on her own.

Related to the issue of productivity is the issue of the TC's autonomy, or ability to work on her own with minimal input from the SME. My study finds that SMEs want TCs to be autonomous, but do not always give TCs the power to be autonomous. When withholding critical information or excluding TCs from the project or update meetings that would potentially give TCs the context and details to write or update their documentation, SMEs withhold the power of autonomy.

Slack, Miller, James and Doak (1993) have found that technical communicators need to learn more about the technology and be involved in the meetings early on in the process. My study confirms this finding and illustrates the business costs that can result

from this exclusion. TC6 gives a clear example of being excluded from meetings that would have helped her to perform her duties:

One of my job responsibilities is data management for our experimenters. Project management, the software team, and operations have met twice now without me to discuss the project's plan for data management, despite my repeated requests to be included in any discussions. I found out about it because one of the operations people asked me for my notes from the meeting and wanted to know how I documented our new process. I have since found out that several key decisions have been hashed out, without my inclusion to document the reasoning and process for our experimenters. I have asked the principal investigator (scientific, technical management) on several occasions now— in person, because I can't get any response to my emails— and he keeps saying "we need to talk about that." Then he'll ask, "Didn't we just talk about that?" I have to remind him that we actually just talked about needing to talk about data management, and that we haven't actually had the discussion. We have a group of experimenters arriving this week to use our system but have no documentation to give them for storing or accessing the data from their experiments.— TC6

Because TC6 was not invited to project planning meetings, she was not aware of decisions, reasoning, and processes that should have been included in the documentation she was writing. This TC was proactive and looking to be autonomous (*my repeated requests to be included; I have asked the principal investigator...on several occasions now; I have to remind him*), but when her efforts to join the conversation failed, her progress on her documentation came to a halt, and no documentation was subsequently available to the experimenters.

Technical Knowledge versus Technical Learning

I wouldn't try to write a cookbook without testing out some of the recipes. — SME4

I got into this field because I like to write. My interest in technology came much later— TC5

The importance of TCs possessing technical knowledge was cited by half (n=4) of the SMEs in my study. Technical knowledge, as defined by Walkowski, included having fundamental or baseline knowledge of the subject matter. As Walkowski explained, engineers do not expect TCs to be technical experts. My research contradicts the finding that TCs need only limited technical knowledge. Rather, my results indicate TCs need to acquire in-depth knowledge of whatever technology they are documenting. In addition, my data indicates that SMEs are as concerned with the TC's interest and curiosity about the technology as they are with existing technical knowledge.

Technical learning (as opposed to technical knowledge) is the term I am applying to an individual's maintaining an interest and curiosity in technology. SME comments on technical learning focused on understanding how a product works (SME1); willingness to "play" with technology (SME4); and getting as much experience as they can using the software (SME5). One clear benefit of having an aptitude for technical learning is that since technology changes so rapidly, technical learning allows the TC to continue to advance his or her knowledge and to subsequently continue to be able to tackle documentation issues armed with that knowledge. My study found that SMEs are sometimes wary of TCs who are hesitant or unwilling to work with the actual product or

software (even while it is still in the development phases). As SME5 stated, *“I don’t believe it is possible to write documentation that will help a user without ever having used the software and experiencing what a user will experience.”*

SME7 recounts a story of a TC who appeared to lack an interest in learning the technology:

Lucy had trouble understanding the technology and seemed disinterested in working in the test environment. Part of her job was to file [software] bug reports to help out the development team. In order to find bugs, you have to actually use [the software]. She regularly reported [erroneous] bugs when she didn’t understand how the processes worked. These reports were often vaguely worded, and often we could not recreate the problem she found. Whenever I or another developer rejected these reports, she became defensive and would escalate these supposed bugs to the Project Manager. Furthermore— in the testing— actual bugs were found— bugs that would have been caught by her if she was thoroughly reviewing the application. At least one of these turned out to be an actual defect that made it into production. If she had spent more time in the application, trying to figure out how the bug occurred, and filing a more detailed report, it would have prevented the bug from going into production.

In this story, the SME attributes some failures in the software to the TC who did not perform well at her job. This SME explains that the TC did not grasp the technical concepts, lacked understanding of the processes, and wrote in a way that was unclear and not detailed. There is also mention of interpersonal conflict (*she became defensive*) and not following protocol (escalating issues to the Project Manager). If we look a bit deeper at this SME’s analysis, we also see the story of a TC who might not have been as disinterested as she was uncomfortable with the technical aspects of her job. What the SME interpreted as choosing actively not to use the software could also have been the

case of the TC not knowing how to use the software. This doesn't entirely excuse the TC, but it does provide an alternate explanation for her errors. It also supports the importance of the TC to have a level of comfort with and aptitude for technical learning.

Interestingly, one area that is commonly omitted from the literature is the technical knowledge of the SME. This makes sense because by their definition, SMEs are expected to be experts, or at least proficient at the subject matter they are sharing. In fact, the subject matter knowledge of the SMEs was unquestioned by four of the TCs in my study. However, the remaining three TCs in my study suggest that information provided from SME is sometimes not thorough, not correct, or overly complicated. For further discussion on information that is overly complicated, see the *Writing and Language Skills* section of this Chapter.

Another challenge for TCs is finding an SME when one has not been assigned to them. SMEs are specialized and limited in their expertise. For this reason, it may sometimes be difficult to find an SME who has the specific knowledge the TC needs. TC1 explained that the challenge of finding an SME with the right expertise is especially true for older products where the development team has changed over time and new developers are brought in. As he explained, the new developers don't have the overall knowledge of the product or its history, and tend to specialize in other areas. In his words, *"To find the right SME that has the knowledge and experience that you need to write effectively can sometimes require a bit of detective work."* — TC1

Professionalism, Respect, and Trust: Partners and Adversaries

They tend to be pompous, SOBs. Just kidding.— TC4

I don't appreciate TCs who think they know more than me.— SME2

Walkowski describes professionalism of TCs largely as being able to work effectively as a member of a team and conducting oneself as a professional. I would argue that her definition of what constitutes a bad attitude, namely, writers who are condescending, difficult to work with, and behave as if they are technical consultants, is still describing an aspect of professionalism (or, in these cases, unprofessionalism). For this reason, I combined these two categories in my taxonomy. Four of eight of the SMEs in my study were concerned with TCs who lack professionalism. Specifically, they are off-put by TCs who think they know more than the SME; exhibit behavior or language that is belittling, defensive, or impatient; or show a lack of commitment. SMEs appreciated TCs who are *friendly and take ownership of the documentation they are producing (SME1); are able to make points quickly and with tact (SME3); and exhibit patience and perseverance (SME7).*

My study also confirms that TCs feel they do not receive consistent respect or trust from their SMEs. Participants found SMEs to sometimes be arrogant and dismissive. The TCs felt this lack of respect was for both their role as Technical Communicator and for the documentation process in general. This concern is similar to that of a participant in Wilson and Ford's (2003) study who wrote that an engineer told him no one ever reads the manuals; they only write them to minimize liability (151). One comment made by

TC4 looks, on first reading, to concern availability. He writes, *“Getting SMEs to spend adequate time reading the material and providing meaningful feedback.”* After further dialog with this TC, I came to understand that this was actually an issue of an SME who was indifferent to the documentation process and cycling (McKinnon, 1993) that the TC had explained to him. Other comments made by TCs regarding lack of SME respect and trust include the following:

- *TC4— Experts in any field can be dismissive and also not particularly trusting in your ability or the importance of your role as a writer.*
- *TC5— [It is a challenge] developing their trust that I can learn and write about their product effectively.*
- *TC6— [I fight] the occasional prejudice that comes with being a technical communicator whose degrees are in English and Composition rather than having a Bachelor of Science in whatever field the SME values most.*

For their part, five of the eight SMEs recognized that some SMEs lack respect for TCS.

These five indicated the SME’s impact on collaboration problems with the following comments:

- *SME1—[SMEs] sometimes have a big ego and they tend to think that dealing with technical writers are not part of their job*
- *SME5—A software engineer that doesn’t recognize the importance of good documentation*
- *SME6—Quickly building mutual trust and respect is important for writers/designers and SMEs to be able to collaborate on projects effectively*
- *SME7—SME’s not giving accurate time to the writers can cause a lack of understanding. Lack of patience certainly can cut both ways.*
- *SME8—Fear of the other side. Not knowing what the other knows.*

These comments indicate that some SMEs recognize their own limitations (ego, lack of knowledge about documentation, lack of time, lack of patience) and recognize skills (understanding roles, building respect and trust, understanding strengths and weaknesses, sensitivity to time and demands) needed for successful collaboration with TCs. My data on SMEs who failed to recognize themselves as possible contributors to failed collaboration attempts also suggests that while some SMEs see successful collaboration with TCs as a dual responsibility; other SMEs do not consider their own lack of knowledge or skills, inability to build relationships, or understanding of roles as possible barriers to successful collaboration. That this omission occurs in more than one or two SME responses is notable.

Audiences and Contexts

It's difficult making the SME understand that the audience does not know what he knows.— TC7

He had a narrow interpretation of the writer's role in the overall process.—SME4

My study found that both TCs and SMEs are concerned with the audiences of their work. At the same time, each group has expressed specific concern with the other's lack of audience awareness. TCs in my study pointed out the challenge of "getting SMEs to understand the audience" (TC4) and the need for SMEs to "provide all of the information that would be helpful to the user when using the product" (TC3). In a similar manner, SMEs expressed the need for TCs to "understand the customer and their needs and be able to make recommendations" (SME2), and charged some TC's with "not understanding the end user" (SME6).

What makes this particular finding unique is that previous studies of collaborations between TCs and SMEs did not expose the SME's concerns with audience. Walkowski's study did not indicate a desire on the part of the SMEs to have TCs understand the audience. It is possible that the SMEs in Walkowski's study simply assumed the TCs with whom they worked were competent in this area. Equally possible is that the topic of audience awareness was not on the radar of Walkowski's SMEs. Although we are more accustomed to hearing about the TC's concern with audience, my study suggests that we should reexamine the unstated assumption that our field has a monopoly on audience considerations.

Context is a second area in which both TCs and SMEs see limitations in the other's level of understanding. Walkowski's taxonomy did not include the category of organizational perspective, which I use to describe an understanding of roles, processes, and relationships, not only with each other, but also within the larger context of the department or the organization. However, one of the top critical skills that SMEs want TCs to possess is an organizational perspective. "Understanding the big picture" (SME6) was a topic of concern for three of the eight SMEs in my study. As SME6 explains, *"It can be frustrating to have to explain how everything fits together and the impact one subject has on others."* When discussing the importance of understanding budget guidelines related to both development and production, SME2 expressed frustration with TCs who *"show no concern with cost."*⁵ Another aspect of organizational perspective that SMEs

⁵ SME2's concerns with cost may be atypical of other SMEs, in that her career has spanned 30 years, and she has spent much of this time in the dual role of project manager and SME.

said their TCs lacked was an accurate understanding of roles. The topic of role expectations is covered in the previous chapter, but role expectations is also an important aspect of organizational perspective, because, as *SME4 states, “A narrow interpretation of the writer’s role in the overall process, specifically that the subject matter is too difficult for the writer to understand” is problematic.*

Meanwhile, TCs are concerned with the SMEs’ lack of contextual awareness involving product and documentation. Understanding of the context of the documentation (predicting gaps in knowledge/how topic fits into overall product/product lifecycle/product support) has been cited by two of the most senior TCs of my study to be a critical skill needed by SMEs. My study also found that TCs want SMEs to understand how documentation fits into the “big picture.” Notable comments about the importance of the SME’s understanding of the context of documentation include the following:

- *TC1— A person who knows the subject, and is also familiar with how the subjects fits into the overall context of the product.*
- *TC2— A good SME is someone who understands product lifecycle as well as product support. Someone who can predict where gaps will form between what we know about the product and how we support it, and how reality plays out.*

Communication: Considerations and Deliberations

Few would argue that communication skills are necessary in a TC, and scholars (Hart, 2000; Kim and Tolley, 2004; Winsberg, 2000; Walkowski, 1999; and others) have pointed to the importance of TCs having solid communication skills, which has variously included

gathering information, communicating knowledge to customers, articulating problems, and using language to shape the world. My study found that SMEs expect much more specific communication skills in the TCs with whom they work. Communication skills are also an important attribute of SMEs, as Lee and Mehlenbacher discovered. Their work largely defined the communication skills of SMEs as the ability to talk on the user's level. My study confirmed and expounded upon this definition. In addition, my study found that remote and global communication is becoming an increasing concern in TC/SME collaborations.

Listening Actively and Speaking Clearly. Contrary to what Walkowski found — that SMEs define communication skills largely in terms of oral communication (specifically the ability to articulate when something was wrong with a document) — my study found that SMEs are primarily interested in the active listening skill of TCs. SMEs were frustrated by TCs who did not take notes; asked the same questions multiple times; and interrupted them during explanations. The active listening skill (along with project management skills) was one of the two most frequently mentioned competencies that SMEs wanted in TCs. Five of the eight SMEs noted the importance of a TC exhibiting active listening, which, in addition to the aforementioned practices of taking notes and not interrupting, included the advice of SMEs 1, 4, and 6, to ask open-ended questions. Active listening ties back to the issue of technical learning, which, as we have seen, is a top area of concern for SMEs.

Writing and Language Skills. Since the job of the technical communication relies heavily on the writing and language skills of the TC, these skills often fall under the scrutiny of the SMEs with whom they work. My study confirms Walkowski's finding that SMEs are concerned that "some writers can't write" (65). In fact, Walkowski cited this category as the one with which her SMEs were the most concerned and the one mentioned most frequently. My study similarly found that SMEs were concerned with the lack of precision and lack of attention to detail in some TCs' writing. SME4 explained the problem this way: *"Since technology tends to require precision, this quality causes distracting concern that the writing will require more than a review for technical details, but also for spelling, grammar, punctuation, etc."* SME5 was not as forgiving. In his words, *"If I am better at writing things simply and clearly and have to correct your spelling and grammar, then you're in the wrong profession."*

While poor writing skills may plague some TCs, it is also true that the source materials they have received (from the SME or an alternate source) are sometimes difficult to comprehend or to interpret. Lee and Mehlenbacher found that in addition to not talking on the level of a user, SMEs were sometimes indicted by TCs as being, "just plain hard to understand" (547). The TCs in my study report that terseness and technical gobbledygook are the communications practices of some SMEs. TC6 noted that *"Translating their super technical very difficult information into general public-ready material [is challenging]. They truly do sometimes speak another language— code, satellite communication terminology, etc."* In this sense, writing and language skills are also important attributes for the SMEs to possess. Lee and Mehlenbacher's study found that

communication skills included the ability to talk on the user's level. My study confirms that an SME who is "good at" communicating is one who can be articulate and talk in layperson terms. Additionally, my study found that communication skills include having people skills and knowing the art of dialogue. TC6 defined a good communicator as "*one that isn't so wrapped up in technical or in his brain that he can't have a conversation or respond to general give and take communication.*" One could argue that because the SME's job requires him to rise to a higher level of precision, his language will necessarily reflect that precision. And "gobblygook" or no, it is not the SME's responsibility to translate for the TC. As University of Chicago, Booth School of Business graduate Brandon Bailey explains, in the hyper-specialized world in which we live, "SMEs who have been able to succeed in their fields have done so because they have changed their manner of thinking to align with the needs of that field"(personal communication, March 1, 2014). If we follow this line of reasoning, we might argue that it is not the role of the SME to step out of their paradigm. It is the role of the TC to step in.

Global Communication. Although it has not been revealed in previous studies of collaborations between TCs and SMEs, remote and global communication was the third most-mentioned concern that six TCs in my study expressed in working with SMEs. Four of the seven participants noted that working on remote or global teams or both contribute to the challenges they encounter collaborating with their SMEs. My study revealed that the TC's role becomes exponentially more difficult when in-person methods for building ethos and credibility with co-workers are not an option. As TC4

noted, “*Working with someone that is not in the same location can be tricky despite the technology of the times.*”

TC1 added specific observations about the challenges of working on remote and global teams.

The teams that I work with are spread across the globe in 5 different time zones. Scheduling meeting times and getting quick responses to questions can be difficult. [There are also] language barriers. While we use English as the primary language for communication, it is often not the native language for members of our development and Q/A groups. When gathering information and asking questions, it sometimes requires multiple conversations to clarify and resolve issues.

TC3 echoed challenges of time zones and language barriers in her narratives.

Additionally, she noted that communication was limited to e-mail, which made for delays and the need to be extra-careful in writing

Sometimes the SMEs are working in a different location than you, often in a different time zone (such as being in India), which makes them unavailable for telephone meetings. Therefore all communication has to be via email, with a 24-hour delay before receiving a response. Sometimes language barriers arise when working with people for whom English is not their first language. In these cases, you need to be extra clear in your writing and provide all of the background information that they need in order to understand your question.

As the two previous narratives describe, two of the most difficult aspects involved in working with globally located SMEs are related to time zone differences and language barriers.

Time zone differences can prohibit telephone conversations or they can require that conversations take place at extremely early or late hours. One TC with whom I spoke talked about 5:30 AM conference calls with New Delhi (where the local time would be 4:00 PM). Another discussed the seven-hour time difference with his SMEs in Berlin; and a third discussed the six-hour time difference with her SMEs in Dublin. This time zone difference also affected the response time of e-mail questions. Often, mid-day e-mails from TCs in Chicago requesting a quick turn-around would reach the SME at 4:00 AM local time, meaning it would be at least four hours for a response.

The language barriers also posed a few challenges for TCs working on global teams. Because some global SMEs' first language was not English, TCs who were native speakers of English had varying levels of success understanding the SMEs' enunciations, tones, and diction, issues took more time to discuss and often took several return calls or e-mails to receive full answers to the TCs' questions. In addition, TCs noted they had to be much more clear and provide more background in their requests from their counterparts who are non-native speakers of English.

A previous study I conducted on remote TCs also pointed to problems of the TCs to build credibility and ethos over time and distance. While this topic did not initially arise in my current study, follow-up questions I had with some participants suggest that this is another area ripe with data.

SUMMARY

This chapter moved beyond the rudimentary and limited conclusion that workplace relationships between TCs and SMEs are difficult and contentious. It uncovered a complexity in the TC/SME relationship that had not previously been examined. Contrary to existing knowledge in the field, this study found that the most-cited critical skills for TCs to possess, according to SMEs, are Project Management/Resourcefulness and Active Listening Skills. One unexpected finding was that SMEs are more concerned with the TC's interest and curiosity about the technicality than they are with a basic level of technological knowledge. On the TC side of the equation, my study found that in addition to the previous issues of time and accessibility, respect for the documentation process, and communication skills, TCs want SMEs to have contextual awareness, audience awareness and technical knowledge. The Global Communication concerns involved in their interactions with SMEs was another new area with which the TCs in my study indicated having distinct challenges.

CHAPTER 5: DISCUSSION AND CONCLUSIONS

The impetus for this study was a series of conversations I had both with colleagues who are practitioners and with those who are scholars of the rhetorical, organizational, and interpersonal nature of the working relationship between Technical Communicators and Subject Matter Experts. These conversations and further scholarly research focused the research design and methodology of my study and assisted me in the formulation of my research goal, which has been to explore and elucidate the nature and impact of the TC/SME relationship. I arrived at the following secondary questions to help me in answering my primary question:

1. How do TCs and SMEs define the role, value, and power of the TC?
2. What behaviors do TCs and SMEs report as helpful in their counterparts?
3. What behaviors do TCs and SMEs consider damaging in their counterparts?

This chapter summarizes my research findings regarding these questions, and how these findings contribute a broader understanding of the nature and impact of the TC/SME relationship. My research finds that the TC/SME relationship is as much about the dynamic process of identity formation (as described by CoP Theory), and the alignment of interests (as described by ANT) as it is about sites of struggle (ANT). While ANT offers a way to examine the TC/SME network, CoP Theory and Compliance Gaining Theory allow me to examine preexisting perceived power structures such as the SME's expert power and the methods by which TCs learn or acquire information from SMEs Following

is a discussion of how my study findings address my research question and sub-questions.

HOW DO TCS AND SMES DEFINE THE ROLE, VALUE, AND POWER OF THE TC?

Numerous scholars (Dobrin, 2004; Faber, 2002; Miller, 2003, 2004; Tebeaux, 1996, 2003; and others) have examined the unique role and value of the TC, but none has looked at how this uniqueness manifests itself in the relationship between the TC and SME. My research confirms the sometimes elusive and complicated description of this role and its impacts on the TC/SME relationship. Although rhetorical tasks such as proofreading and editing were considered by both TCs and SMEs in my study as a significant part of the TC's role, my research likewise confirms earlier findings (Dicks, 2010; Johnson-Eilola, 1996, 2004) that performing symbolic-analytic tasks is an essential aspect in affording TCs value and legitimacy in the workplace. My study finds that activities such as advocating for the audience or end-users, asking questions of the SME, and educating the SME on the role of the TC are of particular importance in the TC's interactions with SMEs.

The TCs in my study see their value as including contributions to a deeper recognition of end-user and co-worker needs, and to significant progress in organization, departmental, and product development. While the SMEs were not specifically asked about the value of TCs, those SMEs who discussed the TC's value link this value primarily to proving writing skills and bringing new ideas to documentation and training materials.

That TCs typically do not earn an equivalent salary to SMEs suggests that society values SME skill sets over TC skill sets. However, my study provides no explicit evidence that SMEs have legitimate (or positional) power over TCs. What it *does* show is that because TCs often view SMEs as a type of authority, TCs attribute SMEs with expert (French and Raven, 1959) and informational (Raven, 1990) power. TCs' reaction to the perceived authority of SMEs might be described by Cialdini (1984), who explains that from a young age to comply with our parents, who have more knowledge than we do and who control our rewards and punishments. This compliance thus benefits us, and we learn that the positions of authority figures to "speak of superior access to information and power, [and] it makes great sense to comply with the wishes of properly constituted authority (211)." TCs, however, are not entirely without power in their relationships with SMEs. The type of power that some TCs in my study use with SMEs is reward power (French and Raven), which primarily manifests itself as compliments.

WHAT BEHAVIORS DO TCS AND SMES REPORT AS HELPFUL IN THEIR COUNTERPARTS?

My research broadens our current understanding of the alliances between TCs and SMEs and how both groups use these alliances to complete the documentation and training work they are tasked with producing. As ANT suggests, TCs and SMEs need to form alliances to achieve their individual aims and are subsequently defined by their connections to others (Latour, 1996) in the networks. CoP and Compliance Gaining Theory also provide models for how TCs and SMEs share information and the interpersonal and the power dynamics that shape the ways in which they work

together. In this section, I report on helpful behaviors and skills for TCs as perceived by SMEs; advice SMEs have for TCs; and helpful behaviors and skills for SMEs as perceived by TCs.

Helpful Behaviors and Skills for TCs as Perceived by SMEs

My study found that SMEs cite several competencies TCs need for workplace success. As we might expect, these competencies include writing, knowledge of technology, and general interpersonal skills. This study identifies additional skills needed that could be described by CoP as behaviors that are learned through practice and participation within the TC/SME community or the organizational context. SMEs see expressing an interest in technology and having the confidence to play with new products, tools and technologies as critical TC competencies. Other competencies, such as obtaining information about the project team, department, and organization were described as helpful in giving TCs context for how their roles and deliverables fit into the bigger picture. For instance, organizational context could give the TC insight as to why certain materials might be delayed in getting to them or the impact their own delays can have on other workers downstream. Another benefit of organizational knowledge is that this understanding allows TCs to be proactive (resourceful) in taking steps to mitigate potential issues that could impact the completion and delivery of products, processes, or services with which they are involved. My research also found that resourcefulness is key in avoiding many of the potential challenges that TCs have identified in working with SMEs, including procuring time, access, respect, and trust from SMEs. Many SMEs have

indicated their preference for TCs who seek out other sources of information before approaching them and asking for their time and expertise. As one SME stated during a phone call, “It is frustrating when they come to us for basic information that they could have gotten from Google!” SMEs also find it helpful when TCs exhibit active listening. It’s not enough to just listen; TCs must also *show* SMEs that they are listening. My study finds that one way to do this is by taking notes; another is by asking follow-up questions to the answers SMEs provide; a third is to restate what they have just heard the SME say, particularly if it seemed overly-complicated or overly-vague. Again, these methods may also stave off the need for the TC to return to the SMEs, to ask the same questions at a later time.

Advice SMEs Have for TCs

When I asked SMEs what advice they would to a new technical writer or instructional designer who would be collaborating with them or other SMEs, they framed their answers (as ANT would suggest), in terms of how the TCs can best recognize and display the qualities that the SMEs value. A slight majority (7 of 13) of suggestions SMEs have for TCs relate to research and learning. This suggests, that for SMEs, TCs need to follow best practices for researching and learning. These seven suggestions are:

- *SME1 – read the existing product user guide or other sources of information to become familiar with the product*
- *SME1 – request a live product demonstration to show how the product works*
- *SME1 – take notes or record the interview with the SME*
- *SME2 – ask [what is] the best way to work with a person*

- *SME3 – find multiple sources of information to learn...your topic*
- *SME5 – learn to use the [products they are documenting]*
- *SME6 – be patient, listen, ask lots of open-ended questions*

Of the remaining suggestions, only one deals with a measureable action: *set clear, mutual expectations*. The other suggestions are less concrete. SME6 and SME8 indicated that they would advise TCs to *have patience* with the SME and with the process. Equally as intangible are suggestions for what the TCs *need to understand*. Among the SMEs' suggestions for what the TCs need to *understand* are the following:

- *SME2 - the importance of time and budget*
- *SME8 - that you are in this together*
- *SME8 - that the SME is likely thinking that this is keeping them from 'real work' and deal with that appropriately*

Because these are non-observable, non-measureable behaviors, it is not immediately clear how TCs can demonstrate this understanding. Despite its imprecision, this advice might be helpful for TCs to consider. As Walkowski (1991) aptly noted, technical communicators should not base their conduct solely on the expectations of the SMEs; however, "it is safe to assume that writers who heed this advice are more likely to succeed in dealing with [SMEs] than those who do not" (67).

Both the measurable and non-measurable advice offered to TCs from SMEs imply that SMEs do not see TCs as approaching them as partners/collaborations. This viewpoint

suggests the larger need for TC to have a stronger understanding of collaboration and partnerships.

Helpful Behaviors and Skills for SMEs as Perceived by TCs

The TCs in my study named several behaviors that make SMEs supportive workplace partners. Consistent with Lee and Mehlenbacher's (2000) findings, my study confirmed the importance of SMEs' willingness to share their time, show respect for the documentation process, and practice solid communication skills. In the vernacular of Compliance-Gaining Theory, TCs are looking for SMEs to be more accessible, interested, and involved in the documentation process. In addition to the competencies previously identified by Lee & Mehlenbacher, my study found that TCs want SMEs to have contextual awareness, audience awareness and technical knowledge. Finally, TCs pointed out the need for SMEs to have not only respect for the documentation process, but also for the TCs *themselves*.

BEHAVIORS TCS AND SMES CONSIDER DAMAGING IN THEIR COUNTERPARTS

My research expands the field's awareness of which behaviors and attitudes negatively affect the TC/SME partnership.

Negative Behaviors in TCs and SMEs

As might be expected, the behaviors that TCs and SMEs consider unhelpful or even damaging in their counterparts are contrary to those that each group considers most

helpful to their partnerships. Chief among these is the lack of respect or professionalism each group sometimes exhibits toward the other. Other behaviors that yield significant distress to TCs are SMEs being condescending to them, avoiding them, or excluding them. Similarly, SMEs are concerned with TCs who are afraid of or unwilling to work with the technology, are not proactive, and do not show initiative.

TCs' Strategies for Avoiding Potential Damaging Behaviors When Working with SMEs

One way of approaching potential damaging behaviors in the TC/SME relationship is to prepare strategies to preempt these behaviors. The strategies that TCs in my study use to work successfully with and gain compliance from their SMEs are varied and often creative. Based on the responses of the TCs in my study, I propose the following categorization for the most-cited strategies of working successfully with SMEs:

- Affiliation
- Accommodation
- Coercion
- Resourcefulness

Affiliation. This category is based largely on the Liking Rule (Cialdini, 1984); building common ground; giving positive reinforcement; and expressing gratitude. Cialdini tells us there is power in getting to know someone. As he explains, "As a rule, we most prefer to say yes to the requests of someone we know and like" (163). Affiliation is illustrated in the advice of TC4:

If you lose an SME over a petty squabble, it can go a long way to losing that SME's feedback forever. You must always stay even-keeled and upbeat, even in situations where you feel that the feedback is inappropriate or can even make the documentation worse (in your eyes). Find common ground during differences so that the documentation does not suffer.

Accommodation. CoP Theory offers a way to look at an individual's development, learning, and cognition within a group. I use a combination of CoP and Compliance Gaining Theory to inform the category of Accommodation. This category incorporates such considerate and supportive strategies as minimizing time and questions; creating shortcuts for SMEs; and reading technical documents or reviewing online documentation before asking questions of SMEs. An example of Accommodation is expressed by TC5:

[A strategy I use with SMEs is] making the review process as painless as possible. For each piece of documentation, I provide a pdf that highlights changed content, provides labels identifying the feature/enhancement/bug being addressed by the highlighted content, and shows my questions and comments in red. Basically, individual reviewers can scan a review document to locate changes in which they are interested in reviewing.

Coercion. Not all TC strategies for collaborating with SMEs are direct and genuine. The category of Coercion includes such tactics as "using psychology"; providing quid pro quo; giving false deadlines; and using flattery. Flattery proved to be an especially helpful compliance-gaining tactic for more than the one TC in my study. Cialdini (1984) explains, "Although there are limits to our gullibility...we tend, as a rule, to believe praise and like those who provide it" (172). Providing quid pro quo means that if someone does

something for us, we feel obliged to do them a favor in return. This phenomenon is explained by Cialdini as the rule of reciprocity, and he considers it “one of the most potent weapons of influence.” This tactic was illustrated in my study, when TC6 mentioned the following:

Sometimes I use flattery and say things like, “I don’t understand this but I know you do” or “please help me to get your message across so that we can make (the website, these charts, this document) better.” And I admit it, (cringe), I sometimes play a bit dumb. . . just so they don’t think I think I know it all!

Resourcefulness. This category is largely based on the network-building aspect of ANT. Resourcefulness in my taxonomy describes how TCs use both human and non-human actants (sources other than the SMEs) in their networks to obtain knowledge. Some examples of resourcefulness cited by TCs in my study include consulting existing documentation and demos; seeking information from others in the organization; and gaining access to design docs, screenshots, and various works-in-progress. Figure 4 shows the most-often used strategies TCs in my study used for dealing with challenges in their collaborations with SMEs.

Strategies for Collaborating with SMEs

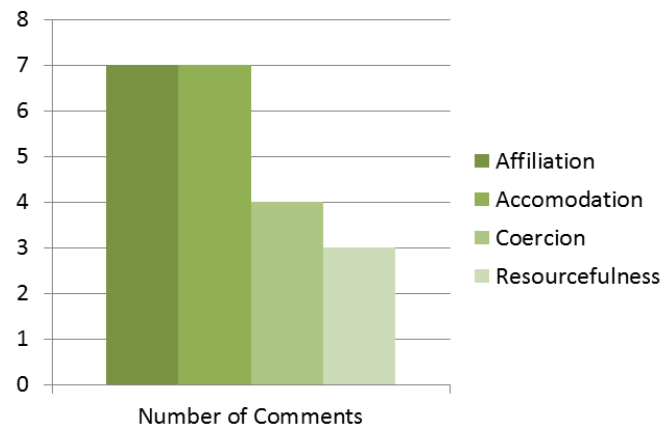


Figure 4: TCs' most often used strategies for dealing with challenges in their collaborations with SMEs

The majority of (14/21) TC comments described using Affiliation and Accommodation strategies. This is noteworthy in that these two strategies both rely to a large extent on building goodwill with the SMEs. A lesser mentioned (4/21) category, Coercion, is indirect and relies on dishonesty. This category, like all others was used by both men and women. That resourcefulness was the least mentioned (3/21) strategy suggests that TCs do not always have the knowledge, opportunity, or proclivity to locate alternative sources of information.

These four categories are by no means exhaustive, and future research will likely uncover additional strategies TCs use to work successfully with SMEs. Future studies could look at defining effective collaborations and then evaluate collaborations in terms of their effectiveness and/or frequency of use.

THE NATURE AND IMPACT OF THE TC/SM RELATIONSHIP

My study reveals key information about the nature and impact of the TC/SME relationship. Not only does the relationship affect the ability of the TC to complete documentation tasks, but the relationship also impacts both TC and SME perceptions of the TC; problematizes the connection between knowledge and power for TCs and SMEs; and introduces new ways to discuss the dynamic nature of power between TCs and SMEs.

Impact on Identity

The TC/SME relationships impacts the way that SMEs perceive the roles and value of the TC and the way in which TCs construct their own identity. Interactions with SMEs contribute to the TC viewpoint that TCs are helpers. TCs talk about themselves as facilitating understanding of the audience, other TCs, and SMEs. ANT would describe the SMEs contribution to the TC's identity formation as resulting from the ability of the TCs and SMEs to align their interests. CoP helps describes the identity formation as a negotiation within the community. Although ANT and CoP help describe the identity formation of TCs in this relationship, they do not appear to account for the identity formation in SMEs. In fact, there was no indication from my study that TCs had a direct impact on the SME's perception of themselves. One possible explanation for this is the identity of the SME is more closely tied to their primary job (as engineer, programmer, technician) than it is to their relationship with the TC.

Knowledge Construction and Power

The findings of my study both confirm and problematize the field's understanding of the relationship between knowledge and power. This relationship is a central tenant in the field, with scholars (Dias et al, 1999; Lyotard, 1984; Pare', 1993; Winsor, 1990, 1996, 2003; and others) concluding that those who decide what constitutes knowledge are necessarily those who hold the power. This assessment certainly hold true for the TCs and SMEs in my study. Because SMEs are typically considered the primary source of knowledge for many TCs, TCs have attributed importance and power to SMEs. Additionally, the negotiation of meaning is evidenced in the practice of TCs and SMEs constructing, deconstructing, and reconstructing meaning via various iterations of documents until both groups are satisfied that the documentation is "correct."

One place my research deviates from current TC scholarship involves the field's emphasis on the articulation view of knowledge (Slack, Miller, James & Doak, 1993), which holds that "the relations of meaning and power operating in the entire context within which messages move" (37). Beyond changes to the content of the documentation, the TCs and SMEs in my study did not discuss their collaborations in terms of creating or negotiating knowledge. In fact, several of the TCs used the vernacular of the (outdated) translation view of communication when they discuss, "gathering information" from SMEs. In the translation view, power is negotiated between the sender and the receiver. The SMEs in my study generally (but not always) privileged the encoding (as opposed to the decoding) process and blamed

misunderstandings on the faulty decoding of the TC. In my study, faulty decoding looked like, “the TC changed the meaning.” Conversely, as evidenced by complaints that SMEs sometimes used language that was either too technical or confusing, TCs privileged the decoding process. Neither group gave any indication that “meaning is fluid and elusive” (Slack, Miller, James, & Doak, 1993, 34).

Fluidity of Power

Anecdotally, we are aware of the power differentiation between TCs and SMEs. In fact, it is common in the field to hear about TCs who have limited or no power with their SMEs. However, my study finds that the power dynamic between TCs and SMEs is not that simple. Rather, it is complex and not easily explained by any existing model. My research confirms ANT’s description of networks as continual sites of struggle over meaning. Compliance Gaining Theory also provides a sound explanation for how TCs were able to gain compliance from SMEs in ways that were sometimes beneficial to both sides. TCs reported using compliance gaining tactics of reciprocity, likability, and the consequences of non-compliance. The power dynamics between TCs and SMEs were rarely related to any formal, positional power.

One place my research diverges from existing scholarship on power is that aside from discussing the fluidity of power, the TC field does not identify various types of power. This is where Compliance Gaining Theory and the Five Bases of Power helped describe the various type of power that were involved in the relationships between TCS and SME.

My research was easily described in terms of expert power, informational power, and reward power. However, I had to combine this model with concepts from CoP to construct categories of compliance gaining strategies TCs used with SMEs.

IMPLICATIONS FOR PRACTICE, PEDAGOGY, AND RESEARCH IN TC

This section looks at the implications my research results have for TC practice, pedagogy, and future research.

Implications for Technical Communication Practice

Scholars (Faber 2002; Hart & Conklin, 2006; Savage 2003; Spilka 2002; and others) have discussed the critical need to build the professional status of TCs. My research suggests that one way TCs can continue making positive strides in elevating their professional status in the workplace is through their interactions with SMEs. They can do this by articulating their value, refining their business and interpersonal skills, and expanding their network.

Articulating Their Value. As Brady and Schreiber (2013) point out, TCs need to learn to “self-assess their work in an effort to make these skills meaningful and visible” (355). My research confirms that this is true, but that it is equally important for TCs to be able to articulate their role clearly. Redish (2003) points to the importance of TCs communicating their value to management. My research confirms this and suggests that TCs need to promote the TC discipline by educating SMEs and other coworkers on the

value TCs can bring to a project. In marketing, this evangelizing of value is often called “building the brand.” A brand is more than the company’s mission, values, logo. As Goodson (2012) explains, “Brands convey a uniform quality, credibility and experience.” One way to assist in building the “TC brand” is to create and use an elevator speech, which is described in the Pedagogy section of this chapter.

Refine Business and Interpersonal Skills. Scholars (Dicks, 2010; Doheny-Farina, 2004; Kim and Tolley, 2004; Wilson and Ford, 2003; and others) have identified the need for TCs to have business and interpersonal skills. My study established that interpersonal skills are necessary for both TCs and SMEs in their workplace partnerships. It found that lacking or not exhibiting these skills, particularly via lack of respect, resulted in TC and SME resentment toward the other. Project management knowledge would make the TC cognizant of issue such as project timelines and contingencies and organizational contexts and processes. Project management skills would equip the TC to talk about, investigate, and gather information and resources about the project team, department, and organization.

Expanding Their Network. If any individual or department wants to earn decision-making power or increase their salary or departmental budget, they must have the support of authority figures in the organization. They must network and build trust among others outside of their department. Unfortunately for TCs, they are rarely called to the kickoff meeting of the big project they will later document, nor are they invited to the celebratory dinner after the project has been successfully completed. It is also rare

for a member of a documentation team to be asked to be the keynote speaker at a corporate “town hall” meeting. Little exposure equals little chance to network equals little perceived value. One way to counter the effects is for TCs to expand their network by looking for opportunities to interact on cross-functional teams and introducing themselves to others. The increased network will allow the TC other sources of information, which will help in their quest to demonstrate their proactivity to SMEs.

Implications for Technical Communication Pedagogy

My research indicates that TC pedagogy would benefit from additional focus on comfort with technology, self-promotion, collaboration and interpersonal skills, and writing.

Comfort with Technology. The importance of acquiring technology knowledge has been cited by scholars (e.g. Kim & Tolley, 2004; Savage 2003) as important for the TC student. My research supports the assertion that the TC curriculum must include opportunities for students to be exposed to and work with new technologies. While previous research has recommended exposure to specific types of technology (e.g. a participant in Kim and Tolley’s study noted that learning HTML-XML would have been helpful), my research does not suggest there is any particular application or type of technology that is of greater value, and in fact, the popularity and usefulness of tools waxes and wanes. What *is* important is helping students gain and express an interest in technology and encouraging them to work with unfamiliar, new, or incomplete products and processes. And the limited life-span of various technologies is precisely why we should introduce

technology in the classroom. Technology changes so quickly that our students have to be comfortable and confident teaching themselves new applications and systems.

Students who are proficient in teaching themselves are more likely to be comfortable enough to embrace and experiment with technology in the workplace. This comfort will put them in a much better position to exhibit the interest and curiosity that SMEs expect TCs to have and will ultimately be a big step in building the TC's credibility with the SME.

Self-Promotion. My research confirms what scholars (Anschultz & Rosenberg, 2002; Clark, 2006; Dicks, 2010; Faber & Johnson-Eilola, 2003; Kim and Tolley, 2004; Redish, 2003; Savage, 2004; and others) have previously noted about the importance of TCs showing the relevance of their work. Kim & Tolley (2004) describe the need to promote our discipline, particularly within the schools. In their words, "Promoting the discipline could mean something as simple as developing better program materials that are updated regularly, or informing academic advisors and other faculty [about our programs]" (384). As my research shows, SMEs appreciate TCs who can explain the specific tasks with which they can assist the SME. My research finds that TC students would benefit from learning to talk about what TCs do and the value they can add to a project. One method of self-promotion is to create an elevator speech that the TC can use with his or her SMEs. An elevator speech is meant to be a short "sales" pitch, that can, as the name implies, be delivered in the time it takes to complete an elevator ride (typically 30 seconds to one minute). Teaching TC students to write elevator speeches that explain who they are, what they do, and the value they are adding to particular projects will heighten awareness of who they are, both individually and collectively.

Without this capability to self-promote, (even if it's in the form of a scripted "elevator speech"), TCs puts themselves at a real disadvantage with SMEs, particularly if the SME does not have experience working with TCs and/or is not convinced the TC can add value to a project. If TCs cannot articulate what it is they do and what value they can bring to a project, SMEs will also be unable to discuss the contributions of the TC and may even wonder if this job is expendable.

Collaboration and Interpersonal Skills. As Pare' (1993) warns, we need to prepare students for the reality that writing in industry is often socially difficult; it can have serious consequences, particularly when there is tension between the individual vision and community expectations. One area that can involve such tensions is teaming and collaborations with SMEs, who may have different expectations of the role and competencies of the TC. As my research indicates, TCs aren't always treated as equal partners in workplace teams, nor are they always credited with having the ability to contribute to more than writing documentation. TC pedagogy would benefit from continued emphasis on classroom collaboration, but perhaps with more focus on group dynamics, negotiation, and influencing without "power." As Johnson-Eilola, (1996) explains, teaching about group dynamics is one way to teach TC students to negotiate difficult situations and avoid the subordination of their roles. Learning interpersonal skills, such as active listening skills will assist future TCs to better collaborate and gain the goodwill of their SME and other team members.

Writing. Writing is another communication skill that should not be minimized in the TC curriculum. While contemporary composition courses often reject the practice and doubt the effectiveness of providing students with feedback on grammar, business and technical writing classes need to look at these skills as essential. That the TC's deficiencies in such areas of spelling, punctuation, and sentence structure were cited by more than one participant in my small group of SMEs indicates the possible need to make such program changes as requiring TC students to complete a technical editing course. As several SMEs in my study indicated, a TC is expected to have highly polished writing skills. This means that TC students should be held accountable for high standards of written English.

Implications for Technical Communication Research

In this section, I will suggest future research designs and methodology that can help the field understand further the complexities of the TC/SME relationship.

Future Research Designs. In 2004, Mike Keppel researched Instructional Designers (ID) working with SMEs. He likened the work of the ID in an unfamiliar content area to an anthropologist working in a foreign culture, explaining that TCs enter new communities of practice and attempt to both understand the context and achieve legitimate participation within the sub-culture. This is a powerful analogy that could be applied effectively to future studies looking to understand the perceptions power dynamics, and evaluations of the TC/SME communities or networks. One way to apply this analogy to future studies would be to design one or more longitudinal qualitative studies that

follow the TC/SME relationships at particular work sites, which would enable researchers to detect more nuances and details about the TC/SME relationship. Research methods could include observations of social interactions and a series of interviews and focus groups with TCs, SMEs and other stakeholders such as managers within the same company. Analyzing data from TCs and SMEs who are working together would allow the researcher to compare multiple perceptions and explanations of the same events, potentially giving even more insight into similarities and differences in perceptions of these workplace relationships.

Future Applications of Methodology. In this study, I used a combination of three theoretical perspectives —Actor Network Theory (ANT), Communities of Practice (CoP) Theory, and Compliance Gaining Theory—to examine the nature and impact of the TC/SME relationship. The combination of these frameworks allowed me to answer my research questions by investigating my data in terms of negotiations and rhetorical alliances between TCs and their SMEs; interactions that shape their individual and collective identities; compliance gained through reciprocity, likability, and the consequences of non-compliance; and types of power that come into play in their working relationships. This same combination of theoretical viewpoints could be beneficial in future studies that examine the relationships of TCs and SMEs. In addition, it could be used to examine relationships between TCs and other project members. A third possibility is that it could be used in any collaboration or network in which power structures are ambiguous and in which learning and knowledge-seeking are key parts of that relationship.

ANT was especially helpful in explaining the challenges and fluidity of social order between TCs and SMEs. Law (1992) notes that the process-focus of ANT means “...that no version of the social order, no organization, and no agent is ever complete, autonomous, and final” (386). The nature of continual change that accompanies technology and the resulting need for TCs to be comfortable with such change is key in understanding potential points of conflict in the TC/SME relationship.

However, Cresswell et al (2010) note that one of the limitations of ANT is that it is too descriptive of the network itself and does not account for individuals or social structures outside the network. Nor does ANT allow us to explain how individual actants learn or acquire information (Reijo, 1999; Spinuzzi 2008) or to explain pre-existing structures, such as power (Reijo, 1999). Instead, it sees these structures as emerging from the actions of actors within the network and their ability to align their interests (Whittle and Spicer, 2008). CoP and Compliance Gaining Theory filled in this gap.

CoP offered a critical way to examine the dynamic process of identity formation for TCs working with SMEs. It also gave me a way to talk about negotiations of power. CoP treats issues of power “in terms of the negotiation of meaning and the formation of identities – that is, as a property of social communities” (Wenger, 2008, 189). In addition, CoP views learning as social participation (Wenger, et al, 2002) and focuses on how individuals construct their identities by actively participating in social communities. This allowed me to examine and discuss how the interactions between TCs and SMEs shape their individual and collective identities. CoP and Compliance Gaining Theory

allowed me to describe the contextual, communal nature of learning that takes place between TCs and SMEs. Compliance Gaining Theory further helped me examine the types of power SMEs can have over TCs and the type of power TCs used to get SMEs to do what they need or want them to do. The combination of these three theories allowed me to create categories of strategies TCs use in dealing with challenges in their collaborations with SMEs.

CONCLUSIONS

My study aimed to analyze the nature and complexities of the TC/SME relationship by exploring how TCs and SMEs define the role, value, and power of the TC and by identifying the behaviors TCs and SMEs report as helpful and damaging in their counterparts. This study has by no means fully exhausted this analysis, and there are several additional aspects to this relationship that could be examined. Some of these aspects include the following:

- *correlations between the amount (both frequency and duration) of contact and the success of the TC/SME relationship*
- *differences between how experienced and novice TCs and SMEs interact with each other*
- *impacts of organizational structure to the TC/SME relationship*
- *impacts of managerial involvement in TC/SME relationship*

There are still several questions remaining on the topic of the nature and impact of the TC/SME relationship. Chief among these is, “How are the workplace relationships

between TCs and SMEs unique from relationships between TCs and other project members?" Future research could examine other specific partnerships, for instance between the TC and Project Manager or between the TC and end users. The data from these studies could then be analyzed to determine what makes each pairing distinctive.

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Tammy Rice-Bailey

CURRICULUM VITAE

SUMMARY OF QUALIFICATIONS

- Over ten years' experience teaching English and Communication courses
 - 20 years' industry experience as a technical writer, course developer, and project manager
 - Experience teaching face-to-face, online, graduate, undergraduate, and Adult Fast Track
 - Research focuses on overlaps between academy & industry and theory & practice
 - Research presented at five major technical communication conferences
 - Experience conducting both quantitative and qualitative research
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EDUCATION

Ph.D. Professional Writing, *anticipated May 2014*

Department of English, University of Wisconsin-Milwaukee

Dissertation Title: Knowledge Retrieval, Collaboration, Quality, and Value: A Qualitative Study

of the Working Relationship of Technical Communicators and Subject Matter Experts

Dissertation Committee: Rachel Spilka (Chair), Dave Clark, Bill Keith, R. Stanley Dicks, Sarah Freeman

M.A. English Literature, 1995

Department of English, DePaul University, Chicago, IL

Graduated cum laude

B.A. Communication, 1988

Department of Communication, University of Wisconsin-Parkside, Kenosha, WI

Graduated cum laude

PUBLICATIONS AND RESEARCH IN PROGRESS

- "Remote Technical Communicators: Accessing Audiences and Working on Project Teams." ***Technical Communication* (Forthcoming in May issue 2014).**
- "Teaching Audience and Tone to Business Writing Students." My Favorite Assignment. *Business Communication Quarterly* **(Forthcoming in December issue 2014).**
- "Questions, Challenges, and Strategies: Technical Communication Interns Working with Subject Matter Experts." **Submitted to *Technical Communication Quarterly* (Revise and Resubmit February, 2014).**
- "What We Have Learned: Rhetorical Strategies of Experienced Technical Communicators." Target Journal: *Journal of Business and Technical Communication*
- "Quality from Three Perspectives: Experienced TCs, TC Interns, and Technical Experts." Target Journal: *Technical Communication Quarterly*.

CONFERENCE PRESENTATIONS

- "Collaboration and Quality: Technical Communication Interns Reveal What They Are Learning" at Annual Association for Business Communication International Conference (ABC), New Orleans, 10/25/2013
- "My Favorite Assignment: Introducing Business Writing Students to Audience and Tone" at Annual Association for Business Communication International Conference (ABC), New Orleans, 10/25/2013
- "Subject Matter Experts to Technical Communicators: Here's What I Like About You" at CPTSC Conference, Cincinnati, 10/11/2013
- "Veteran Technical Communicators Confront Our Assumptions about Subject Matter Experts (SMEs)" at Association of Teachers of Technical Writing (ATTW), Las Vegas, 03/13/2013
- "Virtual Teams, Real Meetings: How We Compensate" at STC Technical Communication Summit Chicago, 5/21/2012
- "Instructional Designers Constructing, Interpreting, and Communicating with Remote, Networked Audiences" at Conference on College Composition and Communication (CCCC), St. Louis, 03/22/2012
- "Teaching Our Student to Navigate Complex Workplace Contexts" at Southwest Texas Popular Culture and American Culture Association, Albuquerque, 02/09/2012

INVITED PRESENTATIONS

- "Designing, Developing and Facilitating Focus Groups" for English 713-Qualitative Research in Writing and Literature, University of Wisconsin-Milwaukee, fall 2010 and fall 2012
- "Managing Difficult Audiences" for Speech 150-Intro to Communication, College of DuPage, spring 2004

GRANTS

Recipient, Association of Business Communication (ABC) *Margaret Baker Graham Research Grant*, 2013

Recipient, Council for Programs in Technical and Scientific Communication (CPTSC) Research Grant, 2012

AWARDS AND APPOINTMENTS

- Appointed Graduate Student Representative, UWM Professional Writing Program, 2012-2014
 - Chancellor's Graduate Student Award, University of Wisconsin-Milwaukee, 2012
 - Graduate Student Travel Award, University of Wisconsin-Milwaukee, 2012, 2013
 - Training Documentation Award from Havi Global Solutions, 2010
 - "Circle of Excellence" award from McDonald's Corporation, 2005
-

INSTRUCTIONAL POSITIONS

Graduate Teaching Assistant (Instructor of Record)

University of Wisconsin-Milwaukee, Department of English, 2010-2014

Responsibilities include textbook selection, syllabus design, assignment design, instructional delivery, classroom management, and assessment.

Adjunct Instructor

College of DuPage, Glen Ellyn, IL, Department of English, 1997-2008

Responsibilities included topic and assignment coordination with instructors from various disciplines, textbook selection, syllabus design, assignment design, instructional delivery, classroom management, assessment rubric design, and assessment.

Adjunct Instructor

International Academy of Design and Technology (*formerly the International Academy of Merchandising and Design*), Department of Communication, Chicago, IL, 1996-1998

Responsibilities included course development, syllabus design, assignment design, instructional delivery, classroom management, assessment rubric design, and assessment.

Writing Center Tutor

University of Wisconsin-Parkside, University Writing Center, 1986-1988

Assisted students from various disciplines and at all levels of writing proficiency by analyzing assignments, listening and responding to students' drafts, and introducing students to various writing strategies.

COURSES TAUGHT

Communication

Interpersonal Communication (Comm 101). Introduces students to the principles of effective speech communication; emphasizes elements of effective audience research, organization, writing, and delivery; students are given the opportunity to write and deliver informational, persuasive, and demonstrative speeches.

Business and Technical Communication

Business Writing (Eng 205). Introduces students to various rhetorical situations in business environments; allows them to analyze audience, purpose, and context and to produce effective workplace communication based on this analysis; gives students experience producing and analyzing common genres of written and oral business communication including memos, reports, proposals, resumes, cover letters, and presentations; introduces them to collaboration strategies.

Technical Writing (Eng 206). Allows students to analyze audience, purpose, and context and to produce effective technical communication based on this analysis; gives them experience producing and analyzing common genres of written and oral technical communication including extended descriptions, fact sheets, instructions, proposals, reports, and technical presentations; provides them with experience collaborating in teams.

Writing Across the Curriculum (Interdisciplinary)

Oral and Written Communication for Mechanical Engineers (Mech Engin 110). Written and oral communication is introduced in the lab sections of this freshman-level engineering course. Gives mechanical engineering students experience in critically analyzing and presenting data, creating basic workplace documents, and making technical presentations in their field.

Critical and Analytical Thinking in Business Management (Bus Mgmt 738). This graduate-level course provides students with training, practice, and feedback in the construction, presentation, and evaluation of clear, well-reasoned arguments; stresses the business relevance and applications of critical and analytical thinking.

Composition

English Composition 1 (Eng 101). Introduces students to writing as a process of developing and supporting a thesis in an organized essay; requires students to read and think critically; emphasizes using appropriate style and voice as well as the conventions of Standard English.

English Composition 2 (Eng 102). Develops students' ability to critically analyze and evaluate the ideas of others and integrate them into their own writing; develops students' ability to carry out research.

Preparatory Writing Skills (no course number). Focuses on reading comprehension and fundamental writing skills, with an emphasis on writing as a process; special attention is given to the conventions of Standard English.

Literature

Introduction to Literature (Eng 130). Develops students' understanding of such elements of literature as character, theme, point of view, symbol, imagery, tone and rhythm; introduces the genres of short fiction, poetry and drama.

COURSES AND WORKSHOPS DEVELOPED

Freelancing and Consulting for Professional Writers

This course is designed specifically for undergraduate students who will be pursuing work as freelance writers or consultants upon graduation. It is intended to prepare students for the multiple contexts in which they will participate as communicators and employees. This course will help students acquire the skills to navigate various aspects of corporate cultures including assimilating into their work groups, collaborating with different types (local, remote, and cross-functional) of work teams, developing the ability to manage projects, and applying problem-solving techniques to workplace issues. *Course developed for the University of Wisconsin-Milwaukee, 2013*

Preparatory Writing Skills

This course focuses on reading comprehension and fundamental writing skills, with an emphasis on writing as a process; special attention is given to the conventions of Standard English. *Course developed and taught for the International Academy of Design and Technology, Chicago, IL, fall 1998*

Designing, Developing and Facilitating Focus Groups

This workshop gives students the opportunity to observe, discuss, and ask questions about a mock-focus group, then participate in an actual focus group, and finally, be debriefed on their experience. *Workshop developed and taught for the University of Wisconsin-Milwaukee, fall 2010*

RELATED INDUSTRY EXPERIENCE

Instructional Design Consultant, Rice-Bailey Consulting, LLC., Jun 2008 – June 2013

- Designed and executed training needs assessment project including consultation with corporate staff, creation of field surveys, analysis of both quantitative and qualitative data, and recommendations for curriculum development for a multi-state financial organization.
- Designed and developed facilitator/user guide on proprietary software product for an international logistics company (*This training received corporate training documentation award*).
- Managed the design and development of self-study (e-learning) courses and Centra (virtual classroom) sessions for a Big-Four Accounting firm.

Instructional Design Manager, McDonald's Corporation, Feb 2004 – Jun 2008

- Developed training and deployment strategy for roll-out of new POS software; assembled team (instructional designer, graphic designer, and writers) to develop instructor scripts and online training; evaluated efficacy of training materials in field tests.
- Managed two large needs assessment projects for technology training in the restaurants; developed surveys, conducted interviews and led focus groups; analyzed both quantitative and qualitative data; managed the development of new courses and tools.
- Created and managed international implementation training program for new operating platform; hired and managed six instructional designers; managed \$500,000 budget for a four-country project, which included design, development, delivery, translation and production costs (*I received the "Circle of Excellence Award" for my work on this project*).

Documentation and Training Consultant, Install Shield Software, *May 2003 – Feb 2004*

- Wrote/edited online help system for multi-platform software application.
- Wrote/edited technical training manuals and texts.

IT Training Consultant, Sears, Roebuck & Co., *Sep 2001 – Mar 2003*

- Consulted with IT management to design technical and business skills curriculum.
- Developed and delivered customized workshops, training materials, and job aides.

Training Specialist, Mobile Data Solutions, *Sept 1999 – Sept 2001*

- Managed external client training projects and customized training materials.
- Trained executive-level management, system administrators, corporate trainers and end-users on proprietary software that included a Global Positioning System (GPS), Automatic Vehicle Locator (AVL) technology, and a System Administrator application.

Instructional Designer, Creative Automation, Inc., *Mar 1998 – Sept 1999*

- Designed and developed more than 20 programming and customer service courses complete with online demonstrations, instructor guides, participant materials, homework assignments, and level one (students' reactions) and level two (students' learning) evaluations.
- Managed and coached technical trainers who had limited facilitation skills.

Senior Technical Writer, Platinum Technology, Inc., *Oct 1994 – Mar 1998*

- Created and maintained external user documentation and online help for proprietary mainframe and client-server software applications.
- Contributed to the creation and maintenance of style guides.

Senior Technical Writer, Kemper Financial Services, *Feb 1990 – Oct 1994*

- Designed and developed financial software user guides and reference guides for internal clients.
- Designed presentations and correspondences for executive team.

ADMINISTRATIVE EXPERIENCE**Graduate Student Representative**, UWM Professional Writing Program, *2012-2014*

Acted as liaison between graduate students and Director of Graduate Studies

Project Assistant to Dave Clark, University of Wisconsin-Milwaukee, *spring 2011*

Created measurable course learning objectives for Oral and Written Communication for Mechanical Engineers course; designed and administered pre- and post-tests to Mechanical Engineering students for research on Writing across the Curriculum (WAC)

President and Board Member (unpaid), Park Avenue Condominium Association, Lombard, IL, *2005-2006*

Managed \$500,000 annual operating budget for 215-unit condominium complex; hired and oversaw management company; conducted monthly board meetings and quarterly homeowners meeting; addressed owner and sub-contractor concerns

PROFESSIONAL ASSOCIATIONS

- Association for Business Communication
- Association of Teachers of Technical Writing
- Council for Programs in Technical and Scientific Communication
- International Association for Performance Improvement
- National Communication Association
- Society for Technical Communication