

# When No One's Home: Being a Remote Writer on Distributed Teams

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*Technology has permanently shifted communication, making remote interaction commonplace. Lack of face-to-face contact can be a disorienting experience for any communicator. Project teams that are spread across multiple time zones have no guarantee of successful teamwork. Are the rules different for remote teams? Integrating as technical writers on remotely distributed teams requires special behaviors. How should remote writers avoid misunderstandings? How can they produce quality documentation under these circumstances? How can they prepare to cope the next time they are thrown into a remote team situation? How would a possible best practice function?*

## BACKGROUND

SAS is a world leader in business-intelligence software and services, enabling customers to turn raw data into usable knowledge. Headquartered in Cary, North Carolina, SAS is the largest privately held software company in the world. It has offices, distributors, and subsidiaries in 118 countries. SAS North America (US and Canada) comprises 60 of the 143 offices worldwide. Writers are located in SAS regional offices across North America.

SAS Client Services support customer-facing projects in presales and implementation phases across the Americas. Seen as field writers, SAS remote writers typically document customized solutions that solve the customer's unique business challenges, not the SAS software products themselves. Project-oriented writers across SAS are in a unique position because they stand between the business users and the SAS technology implementers. As fully integrated remote implementation team members, from their individual offices, they write and edit, maintain quality standards, and establish and evolve processes and best practices.

## COMMUNICATING ON A REMOTELY DISTRIBUTED TEAM

### *Functioning in Changing Team Environments*

Traditionally technical writers have worked in teams where all the members are physically located in close proximity. The writer worked in an office with the other members of the team, e.g., developers and project managers, nearby. This simplified the creation and

building of personal relationships necessary to work effectively together. But more and more these functional relationships and work environments are changing. In the global industrial/technological business arena, these arrangements are giving way to environments that are at once isolating and more accessible. It is isolating because this new arena has the remote writer working in an office or at home, without physical or visual contact with those developers and project managers. But at the same time it is more accessible because neither time nor distance impedes someone's accessibility. The developers may work in other offices in other cities or states or even countries. How does a writer function within this kind of changing team environment?

A number of studies describe the qualities that individuals possess who are most likely to be successful remote workers. The following checklist includes the most desirable attributes: <sup>1</sup>

- perceives expectations quickly
- focuses on shared goals, not on personalities
- plays on the team uncomplainingly
- shares team leadership roles
- is direct and honest
- does not need to be micro-managed
- plans in detail
- facilitates communication
- disciplines team on deadlines and deliverables
- possesses a contagious sense of humor.

### **Geography Matters**

In the haste to abandon office walls, many assumed electronic relationships would be as meaningful as or even richer than the ones physically next door. In the thirst for a higher level of communication with colleagues, they underestimated the impact and necessity of physical reality.

Normally, self-definition is confined within the physical body. A lack of physical boundaries, such as found in the electronic world, distorts this definition. "The inhabitants of the electronic space are diffuse and free from the body's unifying anchor. One can have as many electronic personas as one has time and energy to create." <sup>2</sup>

Research shows that the ability to feel safe and to trust in electronic exchanges is poor. Physical reality, including the use of all the senses, is necessary to adequately interpret behaviors. Body language, tone, and other visual or nonverbal messages, which fade in the electronic transfer, count significantly. Without them, a

remote writer can quickly make inappropriate assumptions.<sup>3</sup>

Remote communication can lead to paranoia. Words and ideas cannot be shared in easy banter. Vocal challenges and consistent spontaneous feedback can be compromised. “Geography still matters, physical space and place are still fundamentally important to us at all levels of society and the economy, even in the information age.”<sup>4</sup>

How can a remote writer compensate for these communication differences that physical distance creates? How can a remote writer prevent physical distance from becoming a detriment to a project and instead use this distance to the project’s advantage?

## BEST PRACTICES

The best practices discussed in this paper were developed and are used successfully at SAS.

### *Distributed Teams at SAS*

SAS does not refer to its own project documentation work style as “virtual,” but uses the term “distributed” as distributed work is the only way we function in delivering services to customers. SAS produces its software in Cary, North Carolina, where the research and development is centralized. Once customers buy these products, services are distributed to maximize the usage of the product and to support customers. Client Services are needed to install, teach, and design so that customers can receive the best benefit from the products. SAS distributed teams are created from the best available expertise in order to implement quickly. Client Services personnel teams are engaged for the short haul (10 months or less per project).

Remote writers at SAS serve as core members of remotely distributed project teams. They contribute to project and user documentation on customized applications during all phases of project development: presales, project definition, requirements gathering, design, build, testing, and delivery, which include knowledge transfer and training. They prepare, as needed, online help, users’ guides, and system administrators’ manuals.

They are usually the lone writer collaborating with 5-8 people who team up remotely from across North America. Although the writer’s primary task is to write, each team member contributes to the documentation effort. The writer works alone although there is collaboration on the final product.

Application developers, system architects, and project managers write much of the documentation. Most are 150-page Microsoft Word documents. Few are more

than 300 pages. Online help documents or systems are integrated with, for example, Web-based applications, and are therefore written with compatible tools.

Most of the remote teams at SAS are project-specific and ad hoc. Documentation is project documentation driven by specific customer or internal needs. Face-to-face team meetings sometimes occur, usually within the context of a customer site visit. Writers at SAS contribute to assessing and defining projects by scribing and facilitating at customer-facing interviews. They need to have strong meeting facilitation skills to keep the communication from going off on tangents, and they frequently exercise the right to ask for clarifications during these meetings. They should report to the SAS team not only everything that was heard selectively, but all of what was said verbatim. Ultimately, the remote writers are responsible for the documentation that comes out of their notes.

### *Project Implementation*

**Onboard and Prepared.** What does a SAS remote writer need to think about in the preliminary stage of project implementation? There are four items to consider.

(1) Has the writer ever worked with these team members before? If so, can the writer confidently anticipate their working styles? If the writer has not worked with these people before, it is useful to find out something about them. If the team members are new, the remote writer will need to guide them through the project process. The aim is that the team should gel as quickly as possible.

(2) Find out for which industry the solution is being designed and the type of methodology being employed. This will give clues about what general business practices are being followed and what documentation deliverables are expected. Time spent doing research into other solutions that SAS has created for this industry is useful in order to understand industry-specific terminology.

(3) What is in the Project Plan? Deadlines will indicate how fast a turn around may be needed. How much detail will there be time for in the document? Who is responsible for what part of the document? Best estimates on documentation delivery are required. How long will it take and at what point in the different methodology phases should the documentation preparation begin?

(4) Getting involved early as a team player in managing the documentation component helps the remote writer keep everyone focused on the results, when the work is distributed to people in remote locations.

**Managing from Your Office.** Once the services sale is signed and project implementation kicks off, the writer, alone in the office, has to take charge of delivering the documentation. These are a few points to consider.

(1) Internal documentation standards govern where documents are stored and how they are named. The SAS knowledge server is a structured database of all projects and their documentation. A DirectoryBuilder tool creates on the knowledge server, a set of folders that are populated with the appropriate annotated outlines or standard quality documents that the project may need to deliver the solution. The writer can use these annotated outlines in the methodology being followed to implement the project. At SAS we have a number of development methodologies that provide guidelines for any team delivering software solutions to customers. An example is the Solution Development Methodology, which is designed to develop custom decision-support systems in a wide range of business problems. It provides guidance on what tasks should be done, when the tasks should be performed, how the development should be done (tools and techniques), and who should do that development (roles and responsibilities).

(2) Assignments with milestones are distributed to the team members. The remote writer's role is to receive contributions and to combine and edit them in the master document. The writer's task is to spot inconsistencies, verify trademarks, and conform to corporate standards using a style guide that provides guidelines for reducing wordiness, readability, capitalization and terminology, spelling and usage of common terms, and punctuation. Or, individuals send their documents using tracked changes and they are merged into the master document. The remote writer controls the master document at all times unless specifically agreed beforehand. Review meetings by way of conference calls are organized with the team to discuss the documents before delivery to the customer.

**Documenting the Application.** Once the development team begins building the application, the remote writer also has to monitor the application's usability for the customer. Here are a few points to consider.

(1) While the application is being built, the remote writer has access to it either on his or her hard drive or on the company network server. When writing about the application, the writer can benefit from more frequent interaction with developers to discuss the application and how it accomplishes the tasks in the way the customer required.

(2) To make this collaboration successful, the writer can, for example, write the User's Guide concurrently with application development and contribute early to the high-

level user interface design, instead of being handed the document to simply edit at the end of development. The writer can inject the perspective that advocates for the user. The documentation is then focused on the user and can win the customers' appreciation. By making the documents valuable to new users, the writer has participated fully in knowledge transfer activities for the customer. Other members of the team, such as trainers and testers, also find this documentation useful.

## **A Best Practice**

**Getting Grounded.** How can physical proximity be relevant or not, when relocation is no longer necessary and the writer can be based in a different time zone and a different place?

Lack of face-to-face contact can lead to a sense of isolation and to an outpost mentality.<sup>5</sup> We have worked on teams where the entire team never congregated because of conflicting schedules. The project still turned out to be highly successful. We think one reason teamwork prevailed in this instance is that at the beginning of the project, the majority of the team met and set clear ground rules for behavior. Throughout the project, some of the team members were able to work face-to-face on components of the project. We could have held full team face-to-face sessions as often as needed but we did not see the value. At project closeout, we delighted in seeing the whole team together, although, in this case, there were a few extra grey hairs. The customer never realized that we had not seen each other, in some cases, since our first meeting at the customer site.

**Spelling Things Out.** It is vital to set ground rules about communication at the beginning of a project. Be direct, honest, and do not let problems fester. Never assume anything--spell it out.

**Managing the Media.** Technology may facilitate the sharing of resources, but feelings of detachment can arise. Recognize abilities of communication channels and their limitations. Video and teleconferencing are formal and best managed by an agenda for information exchange. To be effective they also require formal follow up. For example, a set of meeting notes with actions are distributed to all participants and interested parties within a day or so. Electronic mail, because of its instantaneous nature, can lend itself to loose exchanges that can be misinterpreted, which can possibly escalate to attacks. From this perspective, problem solving may best be suited to face-to-face team settings, and electronic mail for information dissemination. Not only does the writer have to focus on the verbal communication aspects but on managing the actual work product. The documentation is stored on a knowledge server to which

all team members have access. This knowledge management process eliminates confusion.

**Sharing Leadership.** To mitigate the risk of poor interaction, incorporate the roles of facilitator, note taker, timekeeper, and project or discussion leader in this remote interaction. These roles can facilitate remote teamwork.<sup>6</sup>

Are remote teams leader-based, peer-related, or self-imposed? Is it really collaborating creatively or working in parallel engaging in a back-and-forth effort, since team members are not together in the same room at the same time?<sup>7</sup>

Remotely distributed project teams at SAS are leader-based. The leadership ability of the project manager is tantamount. This person pulls the team together and develops cohesion, positive attitudes, such as team pride, and trust. Team members feel comfortable taking risks during subsequent remote encounters because relationships have been founded on trust at team formation.

The SAS team has face-to-face contact at the customer site, which occurs at project start-up. Some preparatory conference calls and e-mails occur before the team meets. From the introductions that the team members hear and the expectations and roles set come a sense of each other's background and the creation of a team spirit. For example, the remote writer is introduced as the person who is involved in all documentation efforts, takes meeting notes, and facilitates the gathering of information at meetings. Team roles can then be clearly defined in front of the customer. A remote writer may have to deal with people who have never participated in a customer-facing assessment or may not understand the role the writer plays on the team. The participants must be educated as to what they are expected to contribute to the documentation effort and meeting notes.

When the team does not cohere, usually it is because there is a lack of clarity about roles and responsibilities and about what the customer expected. It also makes a difference if the customer is ready for an outside team to intervene or if the idea was imposed on the participants. Was the customer forced to accept the meeting, and, thus is perceived as a waste of time? Make sure the customer is ready for a remote team to pursue the project. An efficient remotely distributed team requires a high level of energy sustained over a fairly short period of time to be able to function.

**Hearing Everything Being Said.** Ascertain that the team has addressed everything that was said in a customer meeting and that new ideas are not being introduced. The writer should be able to pick up on everything important that transpires in meetings. They can share a unique perspective that offers strategic

advantage to the team. Other team members may have their own agendas, affording them only a partial view of what is being said. The writer can reformulate what is stated during meetings to make sure that information is being heard among all players.

In a presales debriefing meeting that occurred among sales and consulting members, reformulation served to advance the team's efforts to make the sale. Critical information needed to be reiterated to involved parties. The voice of the remote writer enabled the neutral hearing of the critical information.

At a presales assessment, the customer voiced an appreciation of the questioning and discussion of more details initiated by the writer. This customer was impressed that someone paid attention to the way information was being communicated at the meeting.

**Focusing on Results.** The team must focus on shared goals, which means being detached from the personalities involved. Project teams and task forces are more successful when they are mission- or task-specific. Project teams can be short-term or ongoing for the life of a project. Ongoing work groups are often functionally customer-centered or process-driven based on value streams.<sup>8</sup>

When a writer is part of a local centralized team, then the writer can focus on more than the results—for example, on functional aspects such as developing long-term relationships with team members. In a remote situation, the writer cannot afford to focus on personalities for the long term; if they are dysfunctional, then these relationships can be detrimental to the results.

Instead, the remote team must stay focused on results. Marie Scotto of the Scotto Group, a project management training organization, says that the project manager has to manage by deliverable.<sup>9</sup> Personalities cannot dictate the operation of the team. The role of the project manager is not a functional one but a project-oriented one. Therefore, keep focusing on results to better ignore personality issues. There is no time to indulge others. In managing ad hoc projects that involve distributed teams, Scotto says time is much shorter; therefore, one cannot afford to build relationships. The focus is on the work, not on the personalities involved. The purpose of a project is to create something for a customer, not how that team is organized, if they never see each other, or how the team interacts. The point is to produce a product. Thus Scotto says stay focused on the outcome, not on each other.

An example was a SAS multimillion-dollar data warehousing project that was so large that outside consultants were hired to help. In order to keep the project moving forward with such a variety of work

staff, the project manager and three technical leads focused on deliverables rather than on personalities. There were personnel problems and conflicting personalities, but the leadership of both the SAS team and the customer team stayed centered on the project goals, and thus they were able to overcome these relationship issues.

**Planning the Details.** Good project planning is vital. Details about deliverables, who is responsible for content, when contributions are received, and when reviews are to take place are needed. Knowledge management and a good version control system are requisite because the team, which cannot always be together, needs to stay on the same track.

An example of not staying on track by setting milestones occurred with a multimillion-dollar data-warehousing project for a global telecom company. The 25-page project plan had one line for documentation—a solid yellow line without individual documents listed. There were no milestones, no deadlines, nothing. The writer never knew what was due, when it was due, and so on. This project eventually went over budget and past several deadlines. The customer was pleased with the outcome, but not pleased with the amount it eventually cost that company.

## HOLISTIC COLLABORATION

SAS has developed several methodologies that are used as frameworks for these remote teams. These methodologies involve documentation standards and a number of processes that guide remote teams to successful deliveries of their projects. This has evolved into consistent communities of practice.

### **Communities of Practice (CoP)**

Communities of Practice are entities that are held together by a common purpose and a need to share knowledge. They span different physical and electronic space combinations.<sup>10</sup> These arrangements or forums can enable effective remote teamwork. SAS created a COP for all of its writers across the entire company. It provides useful exchange and insight into the differences between field writers and SAS software product writers and editors, and enforces company-wide standards.

The thread can be a process or a coherent methodology, which can be defined as a series of rules and standards that are followed by all project consultants. SAS methodologies have been researched, written, rewritten, fine tuned, and, most importantly, agreed upon. With these methodologies, remote teams know what documents are expected during which part of a project. These methodologies form the baseline for remote teams.

## **Documentation Standards**

There needs to be a standard for a baseline. Methodology is that baseline; it dictates the quality of documentation deliverables. Besides the actual solution itself, the software application, methodology structures the team's focus on results. It threads and glues together remote project teams. Assuring its practice involves training everyone in the company to use the methodology.

Because the SAS methodology is flexible and sufficiently disseminated and enforced, it can accommodate changes to documentation standards. So far, there have been some small changes. Certain documents have been split out into smaller nuggets. A new document template has filled a gap in the methodology to reflect evolving technology standards.

Does remote writing influence documentation standards? Has, or will, the mechanism of working remotely evolve documentation standards? We pose this question because this is something that we may want to monitor over time. If we can track this, we may see a new standard emerging. We may need to feedback to the methodology the new specific emerging trends to keep documentation standards in sync with remote writing challenges.

## CONCLUSION

On a remote team, the writer, although not physically with the team, is not confined in the office working alone either. If the teamwork is successful, the writer may have more opportunity for communication than in a traditional office situation.

Within this nebulous reality, the writer must pay particular attention to communication. In the quiet of a remote office, by focusing on results and not on personality differences, the writer will be successful and secure a trusted and equal place on the team.

Because of this unique but becoming more commonplace way of working, the writer will need to develop, in addition to traditional skills, non-tangible abilities that are acquired through experience and discipline such as, sharing team leadership, facilitating communication, self management, and focusing on results. Equipped with these soft skills, the remote writer will become a productive player on distributed teams and even on teams that are physically nearby.

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