

CHAPTER

# 12

## Strategic Planning, Being Creative

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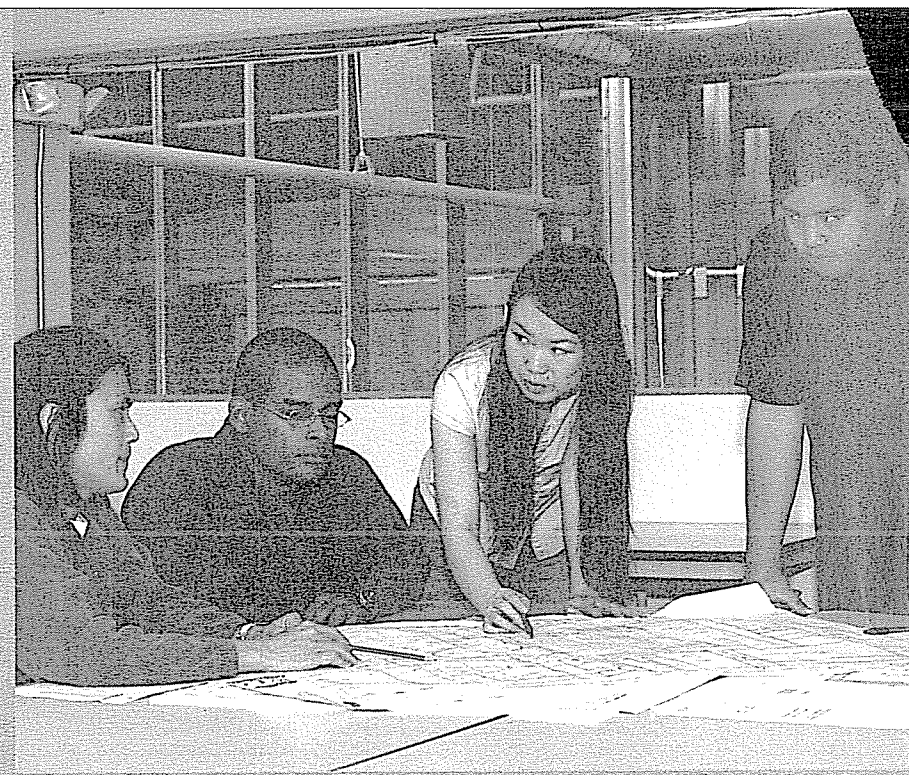
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### In this chapter, you will learn:

- To plan a project in an organized way.
- Strategies for identifying your objectives and “top-rank objective.”
- To develop a list of tasks and a timeline for your project.
- How to use the technical writing process as a planning tool.
- How to generate new ideas in the technical workplace.
- Strategies for being creative and trusting your instincts.
- Five techniques for generating new ideas.

The writing process for any technical document should begin with a “planning phase” in which you think about how you are going to best inform and persuade your readers. Good planning will save you time while helping you write more efficiently and effectively.

## Using Strategic Planning

Effective strategic planning will save you time, while helping you produce higher-quality documents and presentations that are informative and persuasive to your readers. A time-tested method for strategic planning includes three steps: (1) setting objectives, (2) creating a list of tasks or “task list,” and (3) setting a timeline (Figure 12.1).

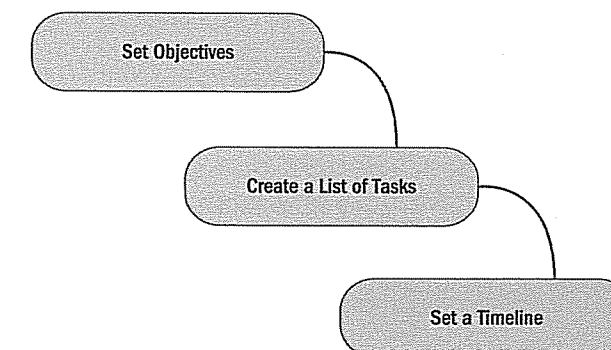
### Step 1: Set Your Objectives

To begin the planning process, you first need to figure out what you want your project to achieve.

**LIST PROJECT OBJECTIVES** On your computer or a sheet of paper, make a brainstorming list of the objectives of your project. For a smaller project, you may list only a few objectives. For a larger project, your list of objectives will probably include many items that vary in importance. At this point, as you brainstorm, you should list any objectives that come to mind. You can prioritize and condense the list later.

**IDENTIFY THE TOP-RANK OBJECTIVE** When your list is complete, rank your objectives from the most important to the least important. Identify your “top-rank

### Steps of Strategic Planning



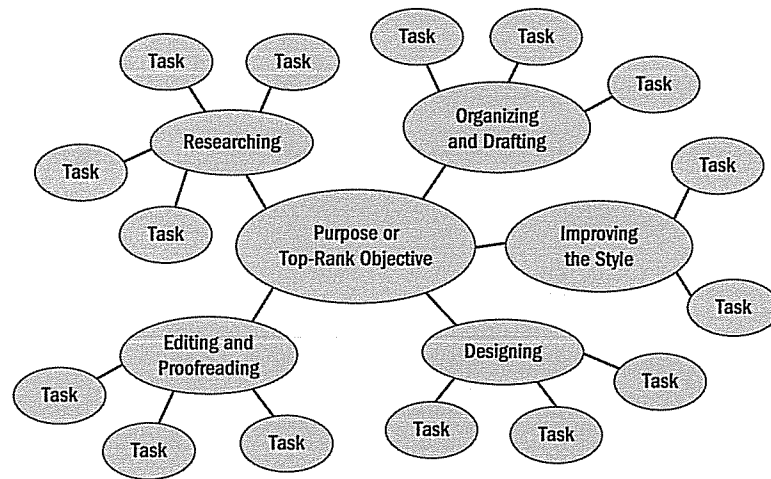
**Figure 12.1:** Good project planning involves identifying your objective and then breaking the project down into tasks that are set on a timeline.



For more project planning tips, go to  
[www.pearsonhighered.com/johnsonweb4/12.1](http://www.pearsonhighered.com/johnsonweb4/12.1)

Using Strategic  
Planning

## Mapping Out a Plan



Project Task List
Researching Task Task Task Task
Organizing and Drafting Task Task Task
Improving the Style Task Task
Designing Task Task Task
Editing and Proofreading Task Task Task

**Figure 12.2:** To create a project plan, map out the two to five major steps. Then, add two to five minor tasks for each major step. Your plan can then be converted into a task list.

**AT A GLANCE**

**Project Planning Steps**

- Step 1: Set your objectives.
- Step 2: Create a list of objectives.
- Step 3: Set a timeline.

**CREATE A TASK LIST** When your logical map is finished, you can transform it into a list of tasks, or a *task list* (Figure 12.2). The major steps in your map will become the larger stages of the project. Meanwhile, the minor steps will become individual tasks that you need to complete at each stage.

### Step 3: Set a Timeline

In technical workplaces, setting timelines is essential. A timeline allows you to keep track of your progress toward completing the project. If you are working alone, the timeline will help you avoid procrastination (and a mad rush to the finish). If you are working with a team, the timeline will help everyone work together to reach the same milestones and deadlines.

**ASSIGN A DATE TO EACH TASK** Working backward from your project's deadline, identify how much time each part of the project will require. Then, on your task list, write down specific dates when each part of the project should be completed. Online calendars and project planning software are available to help you fill out your timeline (see the Help box). These calendaring programs are widely used in technical workplaces, because they allow team members to check each other's calendars and the project calendar.

**Link**  
For more help with identifying your purpose, go to Chapter 1, page 6.

objective" (or what a marketing guru would call your "TRO"). That's the main goal that your project will strive to reach. More than likely, your top-rank objective is going to be almost identical to the *purpose* of your project.

Then, express your project's top-rank objective in one sentence:

Our main objective is to persuade the university's vice president of information technology to upgrade the wireless network on campus.

The primary goal of this project is to develop a solar car that will be competitive in the American Solar Challenge race.

If you are having trouble expressing your top-rank objective or purpose in one sentence, you probably need to narrow the scope of your project. A top-rank objective that requires more than one sentence is probably too complicated to guide your strategic planning.

## Step 2: Create a List of Tasks (or Task List)

Once you have identified your top-rank objective, you should then convert the remainder of your objectives into tasks that you will need to perform. Logical mapping and developing a "task list" are helpful ways to make this conversion from objectives to tasks.

**Link**  
For more tips on using logical maps, go to Chapter 14, page 388.

**MAP OUT THE PROJECT TASKS** Put your top-rank objective (purpose) in the middle of your screen or a piece of paper, and ask yourself, "What are the two to five major steps necessary to achieve this goal?" Once you have identified your major steps, then identify the two to five minor steps that will help you achieve each major step.

You shouldn't reinvent the wheel with every new project. For example, if your project involves writing a document, you can use the "technical writing process" described in Chapter 1 to help you figure out the major steps of your project (Figure 12.2). Here are the stages of the writing process again:

**Link**  
For more information about the technical writing process, go to Chapter 1, page 2.

- Planning and researching
- Organizing and drafting
- Improving the style
- Designing
- Revising and editing

Once you have identified the major and minor steps of your project, put each of these steps on your calendar along with the other tasks that you need to accomplish to finish the project.

**Link**  
For more information on creating a project calendar, go to Chapter 3, page 48.



For software that will help you create a "to do" or task list, go to [www.pearsonhighered.com/johnsonweb4/12.3](http://www.pearsonhighered.com/johnsonweb4/12.3)

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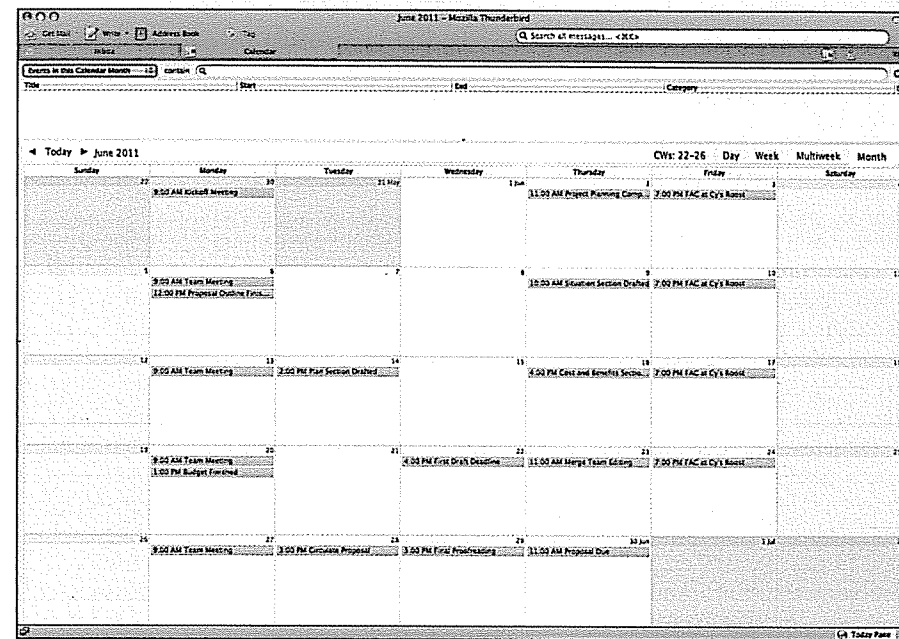
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Not sure how to set your objective? Go to [www.pearsonhighered.com/johnsonweb4/12.2](http://www.pearsonhighered.com/johnsonweb4/12.2)

## Scheduling with an Online Calendar



Source: Mozilla.

**Figure A:** Online calendars are widely used in technical workplaces. They are usually linked to e-mail programs. The screen shown here is Mozilla Thunderbird with the Lightning add-on for calendaring.

## Generating New Ideas

In today's technical workplace, it is difficult to overestimate the importance of innovation and creative thinking. The ability to "think outside the box" has become a tiresome cliché, but this overused phrase highlights the importance of being creative in the high-tech community. Your company's new products and services will only have a short lead time before competitors have answered with their own versions. So, the ability to generate new ideas and solutions is highly valued.

When you finish strategic planning, it's time to start being creative and "inventing" new ideas that will become the content of your technical documents.

### Tips for Being More Creative

Being creative is the ability to come up with new ideas or alternatives for solving problems. Everyone values creativity, but creativity can also be threatening. After all, when you develop something completely new or you do something differently, you're shifting the power balance (MacLoed, 2009). More often than not, the people around you will react with skepticism to new ideas or new ways of doing things. People rarely embrace new ideas right away.

**SCHEDULE MEETINGS OR CHECKPOINTS** At regular intervals on your timeline (each week, every two weeks, or each month), schedule meetings with your team. Meetings can be boring, but people tend to use them as deadlines to get their tasks completed. If you are working alone, you can use the major steps in your project as "checkpoints" to ensure that you are making steady progress toward finishing the project.

## Planning with Online Calendars

An online calendar is a helpful tool for planning your project and coordinating with team members. Until recently, the best online calendars have been tied to large software suites like Microsoft Outlook, Corel Office, and IBM Lotus. These calendar programs are closely linked to the e-mail services included with these software suites.

When search engines like Google and Yahoo! jumped into the e-mail game, online calendars took an interesting leap forward. Now, your calendar (like your e-mail) can be accessed through any computer, mobile phone, or PDA that gives you access to Google or Yahoo! portals (Figure A). So, your calendar is no longer tied to your personal computer. You can access it anywhere. That's a significant advantage.

Online calendars are helpful because you can easily schedule events, including any deadlines and meetings (and social activities). Then, you can set up your preferences, and the calendar will send you reminder messages through your e-mail. That way, you won't miss an important meeting, and you will be fully aware when you blow past the deadline for a project—even if there's nothing you can do about it.

You can set up your calendar to let others check your schedule to find times when they can meet with you. If you scheduled a meeting or an after-work gathering, your calendar program can remind people with e-mail messages ("Hey, don't forget we're meeting at Cy's Roost on Thursday at 5:30").

Online calendars are especially useful for project planning. Once you have created your list of project tasks, you should enter the items into your calendar. Work backward from the project deadline, as shown in Figure A. Put something like "Proposal Due" on the day of the deadline. From last to first, start entering the other tasks into the calendar. Once all the tasks are entered, you can move them around to create a project timeline.

Finally, set up your preferences so your online calendar sends you reminders about when parts of the project need to be completed. The reminders should keep you on schedule.

Online calendaring is easy, and it's a great way to stay organized. Give it a try.



Use a free online calendar program. Go to [www.pearsonhighered.com/johnsonweb4/12.5](http://www.pearsonhighered.com/johnsonweb4/12.5)

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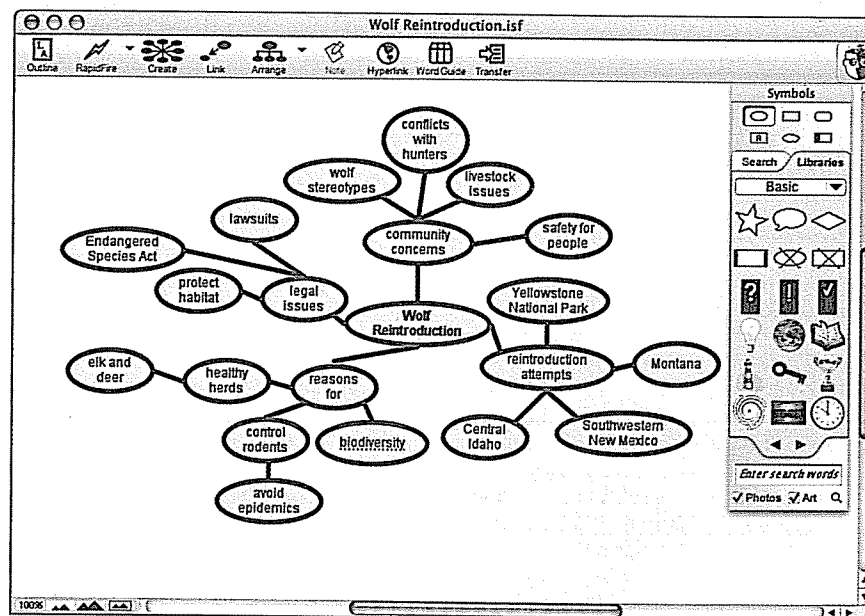
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Want to learn more about creating a schedule? Go to [www.pearsonhighered.com/johnsonweb4/12.4](http://www.pearsonhighered.com/johnsonweb4/12.4)

## Logical Mapping Software



**Figure 12.3:** A variety of software packages, some of them free, are available for doing logical mapping. The program shown here, Inspiration, will help you map out your ideas. Then, it will turn them into an outline.

Source: Diagram created in Inspiration® by Inspiration Software®, Inc.

**BRAINSTORMING OR LISTING** Some people like to make lists of their ideas rather than drawing concept maps. Make a quick list of everything you know or believe about your topic. One page or one screen is probably enough. Just write down any words or phrases that come to mind. You're brainstorming.

Then, pick out the best two or three ideas from your list. Make a second list in which you concentrate on these key ideas. Again, write down all the words and phrases that you can think up. Making two lists will force you to think more deeply about your subject while narrowing the scope of your project.

You can continue this brainstorming process indefinitely with a third or fourth list, but eventually you will find it difficult to come up with new ideas. At that point, you should be able to sort your lists into clusters of ideas. These clusters can then be mined for the major topics that will become the content of your text.

**FREEWRTING** Freewriting is easy. Simply put your fingers on the keyboard and start typing into a document file in your word processor. Type for 5 to 10 minutes before you stop to look over your work. Don't worry about the usual constraints of writing such as sentences, paragraphs, grammatical correctness, or citations. Just keep typing. Eventually, you will find that you have filled one or more screens with words, sentences, and fragments of sentences (Figure 12.4).

Here are a few guidelines to keep in mind as you begin inventing the content of your document.

**CREATIVITY IS HARD WORK.** Breakthrough ideas are usually the result of hard work and tough thinking. So, get to work and stop waiting for inspiration to arrive. You will usually figure out what you are doing *while you are working*, not while you are waiting to get to work.

**PAY ATTENTION TO CHANGE.** When you start a project, focus on the people, processes, and trends that are changing and evolving. Change is usually where you will find new opportunities. Be ready for failure, but don't fear being wrong. Any entrepreneur or business leader will tell you that failure is common and expected. If you fear being wrong, you won't create anything new.

**BE PASSIONATE ABOUT WHAT YOU ARE DOING.** Whether the task is interesting or boring, find a way to be passionate about doing it. A positive outlook will help you stay focused and find new ways to succeed. Above all, do it for yourself, not just for someone else.

**HEAR NAYSAYERS, BUT DON'T ALWAYS LISTEN TO THEM.** People are going to tell you "it won't work" or "it's been tried before." But if you think something will work, follow your instincts and try it out. You might be seeing the problem in a new way or maybe your good idea's time has arrived. Let your intuitions guide you.

## Inventing Ideas

All right, let's put that creativity to work. Sometimes the hardest part about starting a new project is just putting ideas and words on the screen. Fortunately, several *invention techniques* can help you get your ideas out there. Five of the best techniques for technical communication are logical mapping, brainstorming, freewriting, outlining/boxing, and using the journalist's questions. Try them all to see which one works best for you.

**LOGICAL MAPPING** Logical mapping is a visual way to invent your ideas, helping you to discover their logical relationships.

To map the content of your document, start by putting your subject in the middle of the screen or a piece of blank paper. Put a circle or box around it. Then, start typing or writing your other ideas around the subject, and put circles or boxes around them (Figure 12.3).

Now, fill the screen or page with words and phrases related to the subject. Start connecting related ideas by drawing lines among them. As you draw lines, you will begin to identify the major topics, concepts, or themes that will be important parts of the document you are writing. These major issues can be found in the clusters of your map.

Software programs such as Inspiration (shown in Figure 12.3), Visio, MindManager, and IHMC Concept Mapping Software can help you do logical mapping on screen. Otherwise, you can use the Draw function of your word processor to create "text boxes" and draw lines among them. With a little practice, you will find that you can create logical maps on the screen with little effort.



Having trouble with writer's block? For more help, go to [www.pearsonhighered.com/johnsonweb4/12.7](http://www.pearsonhighered.com/johnsonweb4/12.7)

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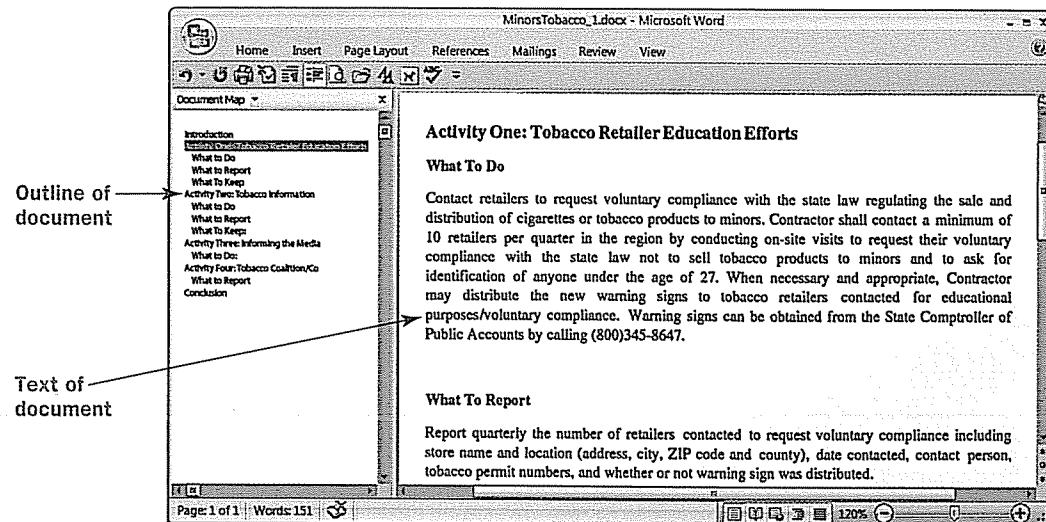
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To find links to logical mapping software, go to [www.pearsonhighered.com/johnsonweb4/12.6](http://www.pearsonhighered.com/johnsonweb4/12.6)

## Outlining or Document Mapping



Outline of document

Text of document

**Figure 12.5:** In Document Map mode, the computer automatically outlines your document on the left. This feature allows you to keep the whole structure of the document in mind as you work on individual parts.

Table function, start out with a few boxes. Then add cells to the table as you need more boxes.

**THE JOURNALIST'S QUESTIONS** The journalist's questions focus on the who, what, where, when, why, and how of an issue. They are also called the "Five-W and How questions." Separately, for each question, write down any words, phrases, and sentences that come to mind about your topic. These six questions will help you view your subject from a variety of viewpoints and perspectives.

Who was involved?

What happened?

Where did it happen?

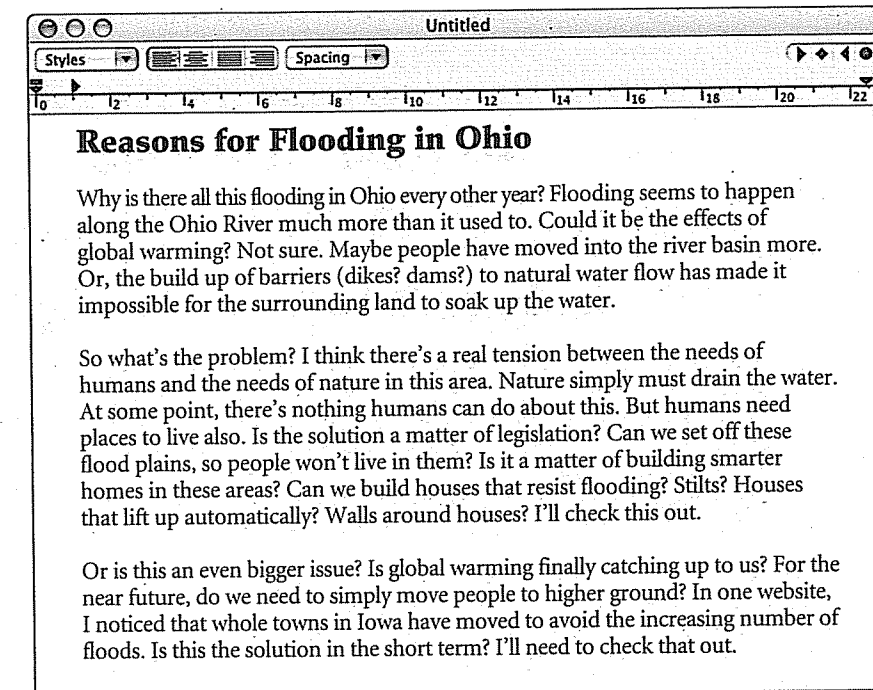
When did it happen?

Why did it happen?

How did it happen?

When using the journalist's questions, pay special attention to anything about your subject that is changing or has changed. If you ask what has changed recently about your subject, you will likely focus in on what is most important about it.

## Freewriting



**Figure 12.4:** While freewriting, just get your ideas on the screen. Simply writing down will help you locate important ideas and directions for research.

You may or may not end up using many of the words and sentences in your freewriting draft, but the purpose of freewriting is to put your ideas on the screen. It helps you fight through writer's block.

When you're done freewriting, identify the two to five major items in your text that seem most important. Then, spend 5 to 10 minutes freewriting about each of these items separately. Like magic, within half an hour to an hour, your freewriting will probably give you the material you need to write your text.

**OUTLINE OR BOXING** Outlines can be used throughout the drafting process. Most word-processing programs will allow you to draft in *Outline mode* or *Document Map mode* (Figure 12.5). Sometimes it helps to sketch an outline before you start drafting. That way, you can see how the document will be structured.

Boxing is less formal. As you plan your document, draw boxes on the screen or a piece of paper that show the major ideas or topics in your document (Figure 12.6). Then, type or write your ideas into the boxes. If you want to make multiple levels in your text, simply create boxes within boxes. You can use the Table function in your word-processing software to make boxes. When using the





- Developing a project plan is a process of identifying tasks and setting a timeline for completing them.
- Start out your project planning by listing your objectives and identifying your “top-rank objective.”
- Create a task list and then put those tasks on a timeline.
- Strategic planning will lead to the need to generate new ideas and be creative.
- Being creative is hard work, but you should pay attention to change and trust your instincts.
- Logical mapping, brainstorming, freewriting, outlining/boxing, and the journalist’s questions are good ways to generate new ideas.
- Creativity means change, so don’t be discouraged if your good ideas are not accepted immediately.



### Individual or Team Projects

1. For a project you are working on right now, go through the strategic planning process described in this chapter. First, list your objectives and identify a top-rank objective. Then, express that top-rank objective as a one-sentence purpose statement for the project. Second, create a task list of items that will need to be completed for the project. Third, put those tasks on a timeline or calendar and schedule any deadlines or meetings that will be part of the project. If you are working with a group, make sure everyone is following the same objectives, task list, and calendar.
2. In this chapter, you learned five different invention techniques to be creative and generate new ideas. Pick a technical subject. Then, use two different invention techniques to generate ideas about that subject. Compare and contrast the results. Which of the techniques worked better for this subject? Why? Which technique felt more comfortable to you? Is there something about the way you think that might make some kinds of invention techniques more effective than others?
3. On the Internet, use a search engine to find advice about being creative. Find five ways to be creative that aren’t mentioned in this chapter. Do you think these websites are offering good advice? What criticisms or skepticisms might you have about the advice they offer for being more creative? What are your criticisms and skepticisms about the advice offered in this chapter?

### Collaborative Project

Imagine that you and your group have been hired to write a travel book about Quebec, Canada, and you need to go there for four days this spring to do your

### Boxing

**Introduction: Report on Flooding in Ohio**

**Purpose Statement:** This report will provide strategies for managing flooding in the Ohio River Valley.

**Main Point:** Solving flooding means restoring wetlands and slowing development.

**Importance of Subject:** If we don’t do something now, it will only become worse as the effects of global warming are felt.

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**Section One: The Problem**

Development in Ohio River Valley  
Increased water due to global warming  
Additional dams and retaining walls

---

**Section Two: The Plan**

Restore wetlands  
Limit development along rivers  
Create holding reservoirs for water  
Remove some retaining walls

---

**Conclusions: We’re Running Out of Time**

We need to restore wetlands and lessen development on river  
Advantages of these recommendations  
The future

**Figure 12.6:** Boxing is like outlining. Each of the cells can be filled with your ideas. Then, you organize these ideas into a more structured document.

In the workplace, people use a variety of strategies to be creative. The five described here are especially useful for writing technical documents, but you may have your own ways of generating new ideas. Whatever you do, don’t be discouraged if your good ideas aren’t always accepted. Creativity usually means change, and change can be intimidating to others. Every once in a while, though, an idea catches fire. Those moments make the effort of being creative worth it.



research. More than likely, most of you have never been to Quebec. It's a historic city in eastern Canada that reminds many people of an older European city. Quebec has great food, a fun nightlife, music, and arts and culture. It is also not far from great hiking, whale watching, and other outdoor experiences.

With your group, use listing or brainstorming to come up with a list of "objectives" that you would like to achieve during your trip. Check out Quebec on the Internet to decide on some of the things you would like to explore while you are there. Then, narrow your list to one top-rank objective and a few other major objectives that you would like to reach while you are on the trip.

Now, create a task list of major activities that you will do when you arrive in Quebec. Remember, you only have four days, so you will need to prioritize what you can experience while you are there. Also, the members of your group don't need to do everything together. You can go your separate ways, giving you a chance to explore more of Quebec.

Finally, use an online calendaring program to schedule your visit. On a four-day timeline, assign a time to each activity (task). Identify who will be going where and doing what each hour of the day. Also, schedule daily meetings or checkpoints in which your group will meet to catch up and make adjustments to the plan.

When you are finished, give your plan to your boss (your instructor) for approval.

**Extra Challenge:** Try to do this collaborative exercise virtually, without meeting face to face.

For additional technical writing resources, including interactive sample documents, document design tutorials and guidelines, and more, go to [www.mytechcommmlab.com](http://www.mytechcommmlab.com).