Preliminary Documentation Plan

This plan describes the proposed content and work plan for
[insert your manual’s working title here]

Date: [the date]
Issued by: [your name(s)]

English 380: Intermediate Technical Writing
University of Massachusetts Amherst
I. Executive Summary

*Insert your executive summary here*

Notes:
An executive summary presents, in *compressed* form, the key points of a report or proposal (like a doc plan). This brief section should give the highlights of what’s covered in more detail in the rest of the plan. Your exec summary must include:
- purpose of the plan
- software application (version and platform)
- users/audience for this documentation
- deliverable formats
- key deadlines (particularly dates for reviews and the final draft)

II. Audience (or users)

*Insert your discussion here*

Notes:
Discussion of Users: distill and summarize the most salient information you’ve gathered through your research. Include concrete details or examples that support or help illustrate your findings—judicious use of such details usually results in a stronger and more persuasive description. I can tell you from past experience that the audience section is often one element that distinguishes plans that earn A’s from those that receive lower grades.

In this section, and/or your TOC section, you should connect your findings about users (and their tasks, motivations, etc.) to type of content/structure you’re proposing for your manual in the proposed TOC. One place that proposals sometimes fall short is by not including specific examples of these links.

For more information, see 380 readings: “What’s a doc plan?” (UDrive) and Barker’s comments on users on p. 208. You may also consult the 9 items listed under “Design plan” in Barker (p. 211) as you draft this section, but you are encouraged to combine these as you see fit (you don’t need to include a separate section or paragraph for each item), and some items may turn out to be more relevant than others.

III. Deliverables and Table of Contents (TOC)

*Insert information about your deliverables (format, style information)*

*Insert a draft of your TOC*

Notes:
Describe the documentation you will produce, listing or describing the type of document, the working title, and the deliverable format (or “media” – print or online).
Present your TOC, along with estimated page lengths, size and number of modules). The TOC should be formatted to look like a TOC, and titles should apply the principles we’ve discussed (task-oriented, action-oriented, specific).

You do not need to describe page layout/design at this time. If you would like to do so, however, you could include a draft module layout in the Appendix

III. Project Schedule

Notes:
In this section, explain how and where your group will complete the work (what tools you’ll use, where you’ll work) and how you’ll produce your manual on time. Use subheadings as needed.

Include a table that shows a timeline to completion—this should include key tasks and deadlines, as well as the names of persons responsible for the tasks listed. See Barker for a sample table (p. 192) and description of common types of events and deadlines.

Use the course schedule to identify key dates, events, and deadlines; supplement these with your group’s individual deadlines for drafting (e.g., assigned research tasks, exploration of the FM program, and # of pages or modules per day or week). You may also briefly indicate any logistics or plans your groups has made to communicate and share document drafts with one another.

IV. Tools and Resources

In this section describe the human, technological, and material resources needed. Include time/page estimates and estimated budget/costs. Consult the readings on doc plans for additional information.

V. Appendices (optional)

Include other relevant documents, as needed.