**Project Shore Line:**

Documentation Plan

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# Introduction

My team is eager to begin producing documentation for Project Shore Line. Starting September 1, my team of three can begin crafting all required content to ensure an effective, on-time Q4 launch of Project Shore Line.

We are producing documentation with two goals:

**Goal #1:** To ensure employees understand how to use Project Shore Line and solve customer issues

**Goal #2:** To ensure customers can easily access online banking services

Effective documentation will ensure the successful launch of Project Shore Line. We want customers to use online banking. We want to impress them with how easy and convenient online banking can be. When comparing our credit union with competing banking options, we want them to choose us.

## Project Leaders

**Andrew Tufts (Project Manager):** Andrew Tufts is a documentation project management specialist with 5+ years of experience writing documentation for mobile apps and PC software.

**Ashley Gorman (Lead Designer):** Ashley Gorman has 7+ years of experience in graphic design and has developed branding, graphics, and advertisements for some of Canada’s leading banks.

**Chris McNeil (Lead Technical Communicator):** Chris McNeil is a content writer specializing in online sales copywriting. His 9+ years of online writing experience will be a valuable contribution to the project.

## Product Description

Our documentation product includes online help, a printed user guide, 30-second video tutorials, and app store pages.

**Online Help Database:** This searchable database includes frequently asked questions, brief tutorials, troubleshooting, tips and tricks, and more.

**Printed User Guide:** All banking customers receive a printed user guide. The guide has a QR code and a link explaining how to download the app. It has a step-by-step tutorial explaining how to setup the app and connect the app to a bank account. The guide contains the most frequently asked questions and support issues.

**30-Second Video Tutorials:** These tutorials explain how to perform basic features in the app. The short, information-packed videos highlight lesser-known features, app tips, troubleshooting, and more.

**App Store Pages:** A good app store description is crucial for a successful app. Our app store description is a keyword-rich, concise explanation of our app and its benefits. The app store page also includes screenshots of the best app features and services.

## Timeline

September 1 to October 14, 2020.

# Product Users

Our documentation is targeted towards three audience types, including older adults with basic tech skills, younger members with more advanced tech skills, and business owners seeking effective banking solutions.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Audience** | **Design Issue** | **Goal** | **Objective** | **Strategy** | **Tactic** |
| **Older Adults** | Intimidated by mobile apps, distrustful of online banking | Accessibility | Reassure safety of platform, highlight basic tasks | Plain English, authoritative and compassionate voice | Write to a grade 7 reading level; write assuming the person has limited mobile app experience |
| **Younger Members** | Unfamiliar with benefits of credit union and unlikely to read documentation | Usability | Advertise benefits of online banking, explain available systems and tools | Plain English, casual but authoritative tone | Write assuming basic familiarity with mobile apps |
| **Business Owners** | Want banking that fits around their busy schedule | Profitability | Highlight cost savings and explain online banking services for businesses | Authoritative and professional tone | Split test mobile app design among group of business owners |

## Information Design Issues

Some customers are hesitant to bank online. These customers tend to be less tech literate: they’re generally older adults who have banked in-person for their entire lives. Our target communities have a higher-than-average median age, including a significant number of retirees.

However, our target communities also have younger families, business owners, and tech-literate adults. We must write to all of these audiences without alienating, excluding, or losing trust. We must sound authoritative so customers trust us with their money, but we must also discuss app benefits and features in an approachable way.

## Collaborative Development

My team needs to communicate with Project Shore Line developers regularly to stay up-to-date on the latest features and to ensure an accurate timeline. I propose daily or weekly scrum meetings to ensure all Project Shore Line team members are on the same page.

## Writing Objectives

We want to convey the **benefits** of Project Shore Line to users. We want to explain the specific advantages they enjoy by using Project Shore Line.

We also want to emphasize the **security** of the platform. Many users understand online banking is more convenient, but they’re concerned about perceived security issues.

Additionally, we will cater our writing to a **7th grade audience level**. Specifically, we will write to a 7th grade audience that has **basic smartphone skills** but few other technical skills. Most of our customers can interact with a smartphone, download an app, tap the screen, and perform other basic functions.

By addressing benefits and security throughout our documentation, we can enhance adoption of Project Shore Line and ensure we onboard as many customers as possible. And, by writing to an appropriate audience, we can minimize support issues and maximize usability.

## Writing Strategies

To achieve the objects above, we implement strategies like:

* Creating step-by-step instructions for all major and minor processes within Project Shore Line
* Keeping step-by-step instructions to fewer than 6 steps
* Avoiding the use of jargon and other technical terms
* Using images and graphics wherever possible to indicate specific steps users must take, including one image for every 1-2 listed steps
* Adding information boxes on the importance of password security, including tips on maximizing account security

# Document Outline & Estimates

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Section** | **Topic** | **Description** | **Illus**. | **Pgs**. |
| 1.0 | Getting Started | Overview: Explanation of how to access Project Shore Line through the secure web interface on a smartphone, tablet, or computer. | 3 | 1 |
| 1.1 | Opening an Account | Procedure: Explains step-by-step instructions for opening a new account. | 3 | 1 |
| 1.2 | Logging In | Procedure: Explanation of how to login to a new account. | 3 | 1 |
| 1.2 | Closing an Account | Procedure: Step-by-step instructions for closing an existing account. | 3 | 1 |
| 2.0 | Managing an Account | Overview: Explanation of the importance of managing your account, checking the account regularly, and the convenience of online banking over in-person account management. | 3 | 1 |
| 2.1 | Displaying Transactions & Balances | Procedure: Step-by-step instructions for displaying transactions and balance statements for a specific account. | 2 | 1 |
| 2.1a | Customizing Searches | Procedure: Step-by-step instructions for selecting an account (checking, savings, or other); or checking the historical time period for transactions and balances. | 2 | 1 |
| 2.2 | Ordering Checks | Procedure: Step-by-step instructions for ordering checks. | 2 | 1 |
| 3.0 | Paying Bills | Overview: Explanation of the convenience of paying bills through online banking and explanation of added security (no paper checks, instant payments, etc.). | 1 | 1 |
| 3.1 | Bill Payments | Procedure: How to add a new bill payee to your account and setup automatic billing every month, using BC Hydro or Telus as an example. | 2 | 1 |
| 3.2 | Credit Card Payments | Procedure: How to make payments for your Great Pacific Credit Union Visa or MasterCard via online banking. | 2 | 1 |
| 4.0 | Online Mortgages & Loans | Overview: Explanation of the benefits of online mortgages and loans, including security, lower overhead costs for the bank (which means bigger savings for the customer), and easy, stress-free rate comparison. | 1 | 1 |
| 4.1 | Applying for a Mortgage | Procedure: How to apply for a mortgage via the online banking interface. | 3 | 1 |
| 4.2 | Mortgage Calculator | Procedure: How to use the mortgage rate calculator to view loan amount, interest rate, term, and payment frequency. | 2 | 3 |
| 4.2a | Mortgage Terms Glossary | Reference: Table of commonly used mortgage terms, including interest rate, term, amortization, etc. | 0 | 1 |
| 4.3 | Personal Loans | Procedure: How to apply for a personal loan, including how to review loan rates. | 2 | 1 |
| 4.4 | Rate Information | Reference: Table of available rates and what they mean for personal loans and mortgages. | 0 | 1 |
| 5.0 | Investing | Overview: Explanation of how the user can perform all the same investing tasks online in a faster, more convenient, and more secure way. | 1 | 1 |
| 5.1 | Investor Questionnaire | Procedure: How to fill out the investor questionnaire to create an investor profile. | 3 | 1 |
| 5.2 | Investor Education | Reference: Table of investor profile types (cautious, risky, etc.) and what they mean. | 0 | 1 |
| 5.3 | Opening an Investment Account | Procedure: Step-by-step guide on how to open different investment accounts, including an RRSP, TFSA, and RESP. | 3 | 1 |
| 5.4 | Investing | Procedure: Step-by-step guide on how to look up an investment and add it to a portfolio. | 3 | 1 |
| 6.0 | Security | Overview: Explain the importance of account security, creating a strong password, and protecting that password, including the steps our bank has taken to safeguard users. | 1 | 1 |
| 6.1 | Creating a Password | Procedure: How to create a strong password for your online bank account. | 2 | 1 |
| 6.2 | Forgot My Password | Procedure: The steps to take if you forgot your password. | 2 | 1 |
| 6.3 | Changing Account Info | Procedure: Explanation of how to change contact information, phone number, and email address. | 2 | 1 |
| 7.0 | Tech Support | Overview: Introduction to contents of tech support section. | 1 | 1 |
| 7.1 | FAQs | Reference: List of frequently asked questions about online banking. | 0 | 1 |
| 7.2 | Computer Requirements | Reference: Table listing computer requirements for online banking. | 0 | 1 |
| 7.3 | Troubleshooting | Reference: Table of common complaints and how to fix them with troubleshooting. | 3 | 3 |

# Resource Plan

We expect a straightforward documentation drafting process for Project Shore Line. Between Q3 and Q4 2020, we will produce all documentation, graphics, online tutorials, print manuals, and other required documentation to ensure a successful launch.

## Documentation Management Process

Our documentation process consists of five steps.

We will collaborate with Project Shore Line SMEs (developers, programmers, and executives) during stages 1, 3, and 4.

## Resource Plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Processes** | **Team Members** | **Timeframe** |
| **Planning** | * Planning online help database * Preparing layout for printed user guide * Interviewing SMEs | * Project Manager * Lead Designer * Lead Technical Communicator * SMEs | Q3 2020 |
| **Drafting** | * Writing FAQs, tutorials, and troubleshooting for online help database * Drafting content for printed user guide * Development of graphics for online and print manuals * Collecting screenshots and product images * Writing scripts for 30-second video tutorials * Writing app store page descriptions | * Project Manager * Lead Designer * Lead Technical Communicator | Q3 2020 |
| **Revising** | * Submitting content to Project Shore Line developers and programmers for accuracy * A/B split testing online guide with users for usability * Testing print manual with readers for accessibility | * Project Manager * SMEs | Q3/Q4 2020 |
| **Editing** | * Implementing revisions in print and visuals * Proofreading and copy editing * Final checks for consistency and clarity | * Project Manager * Lead Designer * Lead Technical Communicator * SMEs | Q4 2020 |
| **Delivery** | * Organizing print specifications * Uploading online guide and tutorial videos to Project Shore Line CMS * Uploading app store descriptions to Google Play and iOS App Stores | * Project Manager | Q4 2020 |

# Schedule

This estimate covers the drafting phase of our documentation project, including the production of all writing, graphics, screenshots, and pages required for Project Shore Line. It also covers the revising, editing, and final proofreading of the project.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Units** | **Hours Required** | **Days Required** | **Final Estimate with ~15% Fudge** |
| **Writing** | **34** pages | 5 hr / page  34 x 5 = **170 hours** | 170 / 8 = **21.25 days** | 24 days |
| **Graphics** | **55** graphics, screenshots, or illustrations | 2 hr / graphic  55 x 2 = **110 hours** | 110 / 8 = **13.75 days** | 16 days |
| **Revising** | **34** pages | 1 hr / page  34 x 1 = **34 hours** | 34 / 8 = **4.25 days** | 5 days |
| **Final Editing & Proofreading** | **34** pages | 0.25 hr / page  34 x 0.25 = **8.5 hours** | 8.5 / 8 = **1.06 days** | 1.5 days |
|  |  |  | **Total:** | **46.5 days** |

Because we have limited experience providing documentation for online platforms like Project Shore Line, we have given ourselves a roughly 15% fudge. Fortunately, most pages can be completely independently of one another – they have high float and can be moved around as needed. If there is a delay on one page or graphic, we can move to the next page or graphic. In terms of Critical Path Method planning, we must complete the writing and graphics phases before moving onto the first revision phase, and we must complete revision before the final editing and proofreading.

**Project Start Date:** September 1, 2020.

**Estimated End Date:** October 14, 2020

## Employees & Roles

|  |  |  |  |
| --- | --- | --- | --- |
| **Title** | **Employee Name** | **Responsibility** | **Abbreviation** |
| Project Manager | Andrew Tufts | Oversight | AT |
| Lead Technical Communicator | Chris McNeil | Writing | CM |
| Lead Designer | Ashley Gorman | Graphics / screenshots / illustrations | AG |

Each block represents one work week (5 days), with 8 hours per work day, excluding two holidays.

**September**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Task** | **Employees** | **Week 1 (Sept. 1 to 4)** | **Week 2 (Sept. 8 to 11)\*** | **Week 3 (Sept. 14 to 18)** | **Week 4 (Sept. 21 to 25)** |
| **Writing** | AT, CM | 24 days remaining | 20 days remaining | 15 days remaining | 10 days remaining |
| **Illustration** | AT, AG | 16 days remaining | 12 days remaining | 7 days remaining | 2 days remaining |

*\*Excludes Monday, September 7 for Labour Day.*

**October**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Task** | **Employees** | **Week 1 (Sept. 28 to Oct. 2)** | **Week 2 (Oct. 5 to 9)** | **Week 3 (Oct. 13 to 16)\*** | **Week 4 (Oct. 19 to 23)** | **Week 5 (Oct. 26 to 30)** |
| **Writing** | AT, CM | 5 days remaining | 0 days remaining |  |  |  |
| **Illustration** | AT, AG | 0 days remaining |  |  |  |  |
| **Revising** | AT, AG, CM |  | 5 days remaining | 0 days remaining |  |  |
| **Final Editing & Proofreading** | AT, AG, CM |  |  | 1.5 days remaining | 0 days remaining |  |

*\*Excludes Monday, October 12 for Thanksgiving*

# Budget

This budget covers the estimated cost of Project Shore Line’s documentation project. It lists the estimated cost of tools, the cost of employees, and the costs of publishing the project online and offline.

## Costs for Tools

Our project requires the use of enterprise-grade desktop publishing software (Adobe InDesign). We also require a license for enterprise content management software (MS SharePoint), which allows us to publish help files and videos online.

|  |  |  |
| --- | --- | --- |
| **Name** | **Cost Breakdown** | **Total Cost** |
| MS SharePoint | * $20 per user per month (included in Office 365 E3 subscription) * 3 users x $20 per user x 3 month project | $180 USD ($237.60 CAD) |
| Adobe InDesign | * $33.99 per month per license * 3 users x $33.99 per license per month | $305.91 USD ($403.80 CAD) |

**Total Cost for Tools: $641.40**

## Costs for People

|  |  |  |
| --- | --- | --- |
| **Name** | **Cost Breakdown** | **Total Cost** |
| **Andrew Tufts (Project Manager)** | * $75,000 per year salary * $36.06 hourly rate ($75,000/2080) * 40 hours of writing, 17 hours of revising, and 8.5 hours of final editing and proofreading (65.5 total hours) | $2,361.93 |
| **Ashley Gorman (Lead Designer)** | * $65,000 per year salary * $31.21 hourly rate ($65,000/2080) * 110 hours of graphic design work | $3,433.10 |
| **Chris McNeil (Lead Technical Communicator)** | * $60 per hour (hourly contracting rate) * 130 hours of writing and 17 hours of revising (147 hours total) | $8,820 |

**Total Cost for People:** **$14,615.03**

## Costs for Publishing

We will publish our documentation project online and offline.

We will publish Project Shore Line help files and tutorial videos online via MS SharePoint to our website hosted on Amazon Web Services (AWS).

We will print Project Shore Line help files into a 34-page color manual, producing 10,000 copies to distribute to clients across all branches. We have partnered with Printing Center USA to print the brochures. The quoted price includes free shipping within 7 to 10 days, allowing us to ship packages of brochures to each of our branches.

|  |  |  |
| --- | --- | --- |
| **Name** | **Cost Breakdown** | **Total Cost** |
| Amazon Web Services (AWS) enterprise web hosting | * $325 per month * Only required for final stage of the project starting October 19) * Pay-per-use pricing based on traffic and user volume * Supports online help file upload and video tutorial file upload | $325 |
| Color manual printing | * Color manual printing estimate via Printing Center USA * 34 page manual with gloss text cover and insides, full color cover, and full color insides * 10,000 color manuals * $0.734 per manual | $7,340.35 USD ($9689.26 CAD) |

**Total Cost for Publishing: $10,014.26**

*All prices in Canadian Dollars (CAD) unless otherwise indicated. United States Dollars (USD) were converted to CAD at rate of 1.32 CAD = 1 USD.*

## Total Estimated Costs

**Total estimated cost for Project Shore Line documentation project:** $25,270.69

**Optimistic budget (completed 15% faster with 15% cheaper employee costs):** $23,364.38

**Pessimistic budget (15% higher costs for tools, people, and publishing):** $29,061.29