Large energy firm increases operational performance through **documentation overhaul**

Addressing end-user and creator documentation challenges, a national energy firm realizes savings of $3.2 million annually.

EXECUTIVE SUMMARY

A large national energy firm was undergoing an operational improvement initiative to address challenges for end users with creating, finding, or applying "how to" information from an expansive 300+ document content library. Taking a user-centric, fit-for-purpose design approach, we scaled the documentation down by 35% and improved findability, searchability, and usability for end users in multiple locations across the U.S.

THE BUSINESS PROBLEM
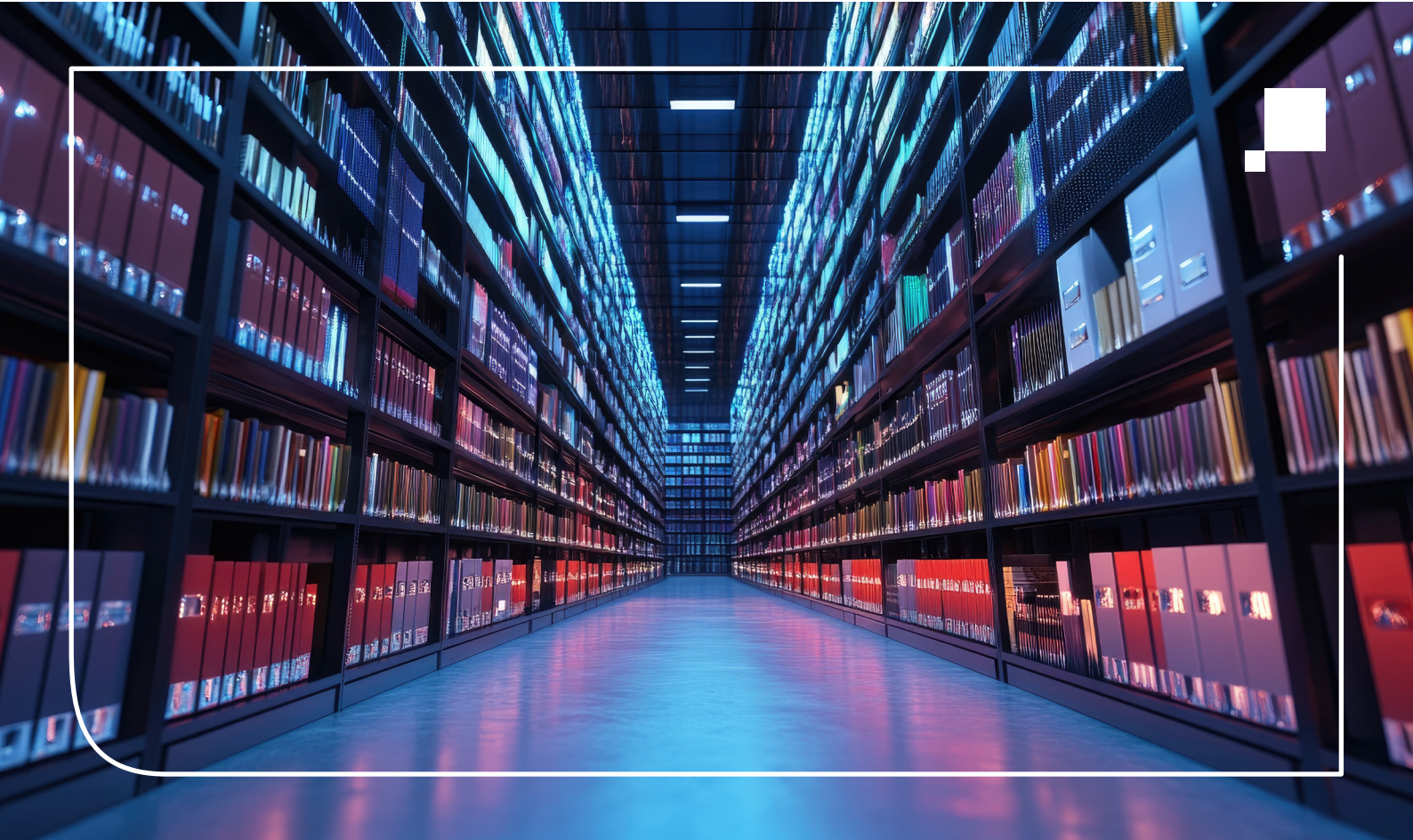
A large national energy firm with different sites all over the U.S. found end users struggled to perform within the workflow due to a dependency on an extensive documentation library that continuously expanded with little consideration for its functionality.

Given the nature of the industry, many documents were typically created by engineers or subject matter experts, and not necessarily technical writers. This authorship style translated into documentation that blended conceptual information with how-to information. The documents were not structured on user-centric principles, resulting in a bloated library of documents that were hard to use, maintain, and update.

Consequently, the associated cost of generating content, the loss of productivity as end users spent time looking for documentation, and the risks associated with the application of conflicting or outdated documentation were a concern.

CHALLENGES

Some of the critical challenges within the client's extensive library of documentation included:

Findability

End users found how-to information difficult to find because it was embedded in more conceptual information.

Predictability

The blended information made it difficult to navigate quickly and intuitively.

Searchability

The documentation was difficult to search through due to its complexity and volume, resulting in time unnecessarily spent sifting through large documents.

Usability

With end users in the field across multiple locations, accessing and using the information in the field with documents being multiple pages of irrelevant information was difficult.

Ultimately, the client needed an information design solution that would concisely provide how-to information in a single document that was more findable and predictable for the end user.

OUR SOLUTION

Working through the document library, we applied **a user-centric approach and fit-for-purpose design**. By doing so, legacy content revealed opportunities to reduce the overall volume of content. Leaving internal compliance and authorship requirements intact, we provided suggestions on improving and refining the content model. Templates were created to address end-user requirements based on information types and flows based on the existing content model.

We standardized the content process with best practices, templates, and authoring requirements to improve usability and fit-for-purpose design **targeted to end-user needs, separating the "what" from the "how."**

Efficiencies were realized where:

1. Duplication was eliminated by combining procedures with the same type of details.
2. New sections in related documents allowed redundant documentation to be retired.
3. Templates focused on the "how-to" with the steps laid out in one or two-page documents.

RESULTS AND IMPACT

Within 18 months of reviewing and merging legacy content, we reduced the 300+ content library documentation by 35%. By using templates to extract and deliver the how-to information in a concise and easy-to-use manner, search times by the end user were reduced by 80%, from approximately 10 minutes per document to 2 minutes.

Additionally, the burden on subject matter experts was reduced for document creation and maintenance, allowing them to spend more time on their primary tasks.

Ultimately, our information content design solution and documentation review and refinement process resulted in annual savings to the client of $3.2 million, an improved end-user experience, and increased operational performance.