Heuristics in Our Professional Life: Supporting Technical Communicators without Holding Them Back

*Technical Communication* celebrates its 60th anniversary this year. Our professional and academic field have become mature and respectable, and that is something to celebrate. In our heavily technologized society, technical communication is more important than ever before. Nowadays it comprises more than communication about technology alone, communication itself is also technologized, as are the production processes of communication means. What is more, technical communication is spreading its wings, and is evolving from a predominantly Anglo-Saxon field into a truly international discipline. Our journal, *Technical Communication*, will continue to play the role it has been playing in the past decades, connecting the professional practice to empirical and analytical research, providing thought-provoking theoretical contributions, exchanging practical experiences, and providing tutorials on specialized topics.

**Heuristics and Knowledge Transfer**

Heuristics remain an important vehicle in the knowledge transfer between academic and professional researchers and technical communication practitioners. In last year's volume of *Technical Communication*, for instance, two articles provided the readers with heuristics. In August, Swarts (2012) offered a list of do's and don'ts for instructional videos, based on an analysis of YouTube videos with high, medium and low ratings. In November, Jochmann-Mannak, Lentz, Huibers, and Sanders (2012) inventoried design conventions for children's informational Web sites, based on a content analysis of such Web sites. The first article in the current issue also emphasizes the role heuristics can play in technical communication, merging guidelines for different manifestations of technology-mediated communication (see below).

As obvious as heuristics may be as a relatively concise and user-friendly way of passing on relevant knowledge about effective communication, there are also potential drawbacks. First, they may be at odds with the notion of practical wisdom: building and using expert insights to do the right thing, such as make the right design decisions (Schwartz & Sharpe, 2010). Heuristics may be helpful as long as they do not try to rule out the professional judgment of technical communicators. It is impossible to replace a good technical communicator with an elaborate set of guidelines. We all know that, but we may easily forget when we are confronted with a set of seriously-looking heuristics. In particular an excessive use of low-level heuristics seems to be at odds with building practical wisdom: low-level heuristics are collections of many very specific guidelines that exactly tell us how to design our communication. They seem to be based on the assumption that good document design can be entirely rule-based. Patricia Wright (1985) already stated that “there are very few rules about writing text that are not legitimately broken” and “there is no universally correct way of presenting information” (pp. 424–425). Indeed, two basic assumptions of practical wisdom are that every situation may be unique, and that, as long as humans are involved, many solutions can be found for the same problem.

Another important aspect of heuristics involves the way they can be optimally used by professionals. Heuristics can take many forms, and several of those forms seem to imply an optimal way of using them, very often as checklists in design or (formative) evaluation processes. Heuristics are among the more popular tools used to safeguard the effectiveness of communication, but at the same time their actual and optimal use appears to be heavily under-researched. From a practical wisdom perspective, heuristics should be designed to supplement, inspire, and support professional expertise, not replace it. They must acknowledge that in most cases we are not talking about standard solutions for standard problems. They must connect to already internalized knowledge and enable practitioners to internalize the wisdom contained in them. Ideally, heuristics are no “shopping lists” for lay persons but gateways to...
more explicit and more fundamental insights for experts. They may draw experts’ attention to specific aspects they had neglected before. They may focus experts’ attention on certain characteristics and thereby affect the evaluation standards they use in specific situations. Heuristics may facilitate the discussion between technical communicators and commissioning companies, and at best may show them how hard it may be to design effective communication. In less fortunate circumstances, however, heuristics may suggest that we are actually working in a very shallow business and not contribute to usability and effectiveness at all. From a design and evaluation perspective, the use of heuristics should not unnecessarily complicate the already complex processes (yes, heuristics themselves must be user-friendly, too).

Don’t get me wrong. I have nothing against heuristics. Heuristics are probably among the best vehicles for knowledge creation and transfer in our field. I think heuristics are fascinating, both at the production side (the translation of practical wisdom and research findings in heuristics) and at the utilization side (the use of heuristics combined with practical wisdom in design and evaluation processes). There is a lot of room for fascinating research in these areas, which really may help our discipline (and others) develop further.

Of course, there appears to be a Droste effect here. In the Netherlands, the Droste effect refers to a repetitive visual effect in which a miniature image of the package is included on the package itself, which may go on until infinity. It refers to the classical package of a famous Dutch cocoa brand, but the principle of course goes back much further in the history of art. What I mean to say is that heuristics are a very interesting form of technical communication as well.

In This Issue

The first article in this issue, written by Roger Grice and an unprecedented number of coauthors (at least within the realm of technical communication), focuses on the development and use of heuristics for technology-mediated technical communication. The literature on heuristics of the past decade shows a tendency toward specification of genres that heuristics are assumed to apply to. Interestingly, this article develops a more generic set of heuristics for a wide range of technology-mediated types of communication. Indeed, it gets harder and harder to distinguish specific genres of technology-mediated communication. The authors connect the heuristics to a set of operationalized metrics, but these metrics are formulated as desired effects on the users, not as easily measurable characteristics of the artifact. In five specific cases, they show how the heuristics and metrics may inspire professionals working on the optimization of technology-mediated communication.

The second article, by Jessica Behles, focuses on the use of online collaborative writing tools by practitioners and students. Ever since the mid-1990s, design processes of functional documents have been drastically affected by the emergence of various types of tools, with collaboration and document management as important objectives. Examples of such tools are wikis, online word processors, and learning management systems. Using an online survey, Behles investigated the use of such collaborative writing tools, comparing technical communication practitioners and students. She concludes that online collaborative writing tools are widely used, and that there are differences in use between practitioners and students.

The third and last article in this issue was written by Lisa Meloncon and Sally Henschel. Using content analysis as their research method, they investigated the current state of the art of undergraduate programs in technical and professional communication in the United States. They compared their findings to the results of an earlier study in 2005, so that a development over time becomes visible. In their analyses, they focus on the names or programs, the requirements, their content, and their institutional embedding.

References


