



...Enhancing your communications

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## How We Work on an IT Project

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We have produced these guidelines to give you some information about how we will interact with your company on any project we may undertake for your business. They should also assist you in preparing the information we will need from you, so that the project can run as smoothly as possible.

In the very first instance, we will request a short meeting with you to show you some examples of our previous projects and discuss our services in relation to your potential requirements.

### When should we have this meeting?

- Well firstly, the sooner you know of a potential project and the sooner you can call in Microfold for your free consultation, the better we will be able to help you.
- Plan ahead, if you can. Call us in when things are quiet, so that you can see what we can do for you. Once you have a better idea of the different aspects to our services, you might discover areas where we can help in advance of a crisis.
- When we visit you, we will ask you the purpose of your project and will need some information about the readership, together with any other relevant details and documents that you may have collected.
- This is where we start to help you. Drawing on our breadth of experience, we may be able to offer suggestions that are a little different to your own ideas. Be open to them!

### What will happen at the meeting?

- During the initial project brief, we will take notes so that we can complete an *Individual Document Plan*. This will include such things as the proposed number of drafts, project deadlines etc.

The completed *IDP* will essentially form an agreement between Microfold and you, the client, for the detail of what a particular item will contain and will form the basis for our quotation.

**Please note:** This is not a commitment to using our services. It is just a tool for ensuring that everyone understands what to expect from any work Microfold might do for you. So whilst there is no financial commitment at this stage, the plan's content will have an impact on our fees and so should be studied carefully, as changes at a later date could result in extra charges.



- It may be that your requirement calls for several different types of “document”, for example: a manual and accompanying on-line help. In that case, we will look at completing a full *Documentation Set Plan*, which will then be broken down into several individual plans.

This may entail further, chargeable consultations but we will explain what’s involved beforehand and you will not be committed to anything unless you agree to it.

If you’d like more details of our planning services and how these apply to your business, please ask to see our *Products and Services* information.

### What happens next?

- After the initial meeting, Microfold will finalise the *Individual Document Plan (IDP)* and send it to you.
- Please check this document very carefully, as it will form the basis for our quotation. If you are happy with it, please sign and return a copy to us, or confirm by email - whichever has been agreed.
- If you feel any points have been omitted, incorrectly documented or there is something that you wish to change, please let us know as soon as possible and we will issue a revised plan. Once this is agreed finally, we will ask you to sign it and send it back to us.
- Again, there is no financial commitment at this point. We will provide an estimate or quotation as appropriate, based on the information agreed in the plan.

If you are happy with the proposed costs, we will usually ask you to pay us a deposit and then we will start work on your project. (*Further details on our charging process are given below.*)

- Once we have started work, if you wish to make changes that were not specified in the *IDP*, Microfold will have to review the situation and if necessary, issue a further version of the *IDP* and possibly an amended quotation.

### How much will it cost?! How long will it take?

Inevitably these two key questions are likely to crop up early. Because they are so closely linked, we will try to answer both together.

- The simplest answer to the first is that our charges will be based on the type and amount of work required and may be quoted as a fixed amount or a daily rate, depending on the project.

That leaves us with the piece of string.



- As part of completing the *IDP*, in most cases we will be able to provide a rough estimate of timescales and thereby, cost. However, generally we will need to undertake some detailed work before we can give you a precise evaluation of the project's cost and duration.

On larger projects this usually takes the form of a short scoping exercise, which enables us to produce an outline structure of the manual, training course, help system etc.

- Depending on the size and complexity of the project, the scoping exercise could take several days. In order for us to be able to quote an accurate and fair price, we operate the scoping phase as chargeable at a daily rate.

At the end of the scoping phase, we will promise to deliver the bones of your project. This will give you the opportunity to examine the details of the proposed structure and content and to request any changes before writing starts.

Also at the end of the scoping exercise, we will produce a more detailed project plan. This enables all parties to have a more accurate assessment of the time and resources needed to undertake the work.

- Usually as part of the *IDP*, we will divide the overall project into phases which will have deliverables, such as a first draft.

Whilst we will endeavour to provide a fixed price for the overall project, we generally use these deliverables as the basis for staged payments. The exact timings of these payments will therefore be agreed at the outset, as part of the *IDP* sign-off. (Our normal payment terms are 14 days.)

**Please note:** The overall price may change if, at any of the completed phases, it is established that software changes have been made which result in unforeseen impact on the documentation.

*If you think that your company would benefit from a longer-term relationship with Microfold, so that you can access our services on a regular basis, we are happy to talk to you about a retainer arrangement.*

### Who owns the final text?

*This is an area where there is often misunderstanding and hopefully the information we provide here will clarify the situation. However, if you have any questions, please feel free to discuss these with us.*

- As per our terms and conditions, proprietary rights to the written material will remain with Microfold and will only be transferred to you by separate agreement, in writing. *(This will usually be subject to a fee.)* This is standard industry practice for most creative works.
- What this means for you (and which is more fully explained in our terms and conditions), is that you will be granted a licence to use the material we produce for you, for the designated purposes only.



Full proprietary rights to the written material will remain with Microfold and will only be transferred to you if agreed separately, in writing. (*This may be subject to a fee.*) For example:

- If you commission us to write a user guide, you will be entitled to use the text for that purpose only. So unless you have an explicit agreement with us, you will not have the right to take the text and use it in other forms, for example, as on-line help.
- If you specifically wish to own the text outright, you must clearly state this during the initial negotiations and an agreement will be put in place to accommodate this. This will usually have an impact on our fees, as we generally charge a higher rate for material that is to be transferred.
- If you have commissioned us to write for you on a licence-to-use basis but decide further down the line that you wish to own the text fully (for example, in order to be able to edit it yourself or pass it to an alternative supplier), we will be happy to negotiate a separate fee for transference of these rights.

**Please note:** In all cases, the right to use the materials commercially will be granted only when Microfold has received payment of the final invoice.

*This information is subject to change without notice and our full terms and conditions are covered in a separate document. If you wish to review these, please ask us to supply you with a copy.*

### **What are the benefits of the way you work?**

We are happy to adapt to your preferred method for working, but our experience has shown that the most efficient and cost-effective way for you is to allow us to work from our own premises for most of the project, with visits to your site only to obtain information about your products or talk to key people as required. That has the following benefits for you:

- Lower costs:
  - Minimised travel costs - obviously if your premises are located some distance from ours, we will have to recover the costs in fuel and time.
  - We charge a higher consultancy rate for working on client sites, as this means we are unable to fit in other business around your project where there might be natural downtime.
  - By working from our own premises, that means you don't have to scabble around to find a spare PC or desk for us in an established office.
- You get 100% output from us:
  - By using our own office, we can jump straight in because everything is set up exactly to our style of working and we don't have to waste time for example, finding out where the printer is located (or indeed walking to it!)



- If we can't get hold of key people on your project we don't sit around twiddling our thumbs with the meter running - we work on other Microfold business (for which you aren't charged) until they can get back to us. Our time is honestly assigned to each job so you will not be charged for activities that don't relate to your project, such as phone calls to our other clients, checking email, making tea etc.

We usually find that processing text electronically (via email and the Internet), and talking to people on the telephone wherever possible is the most cost-effective method of working — especially on a small project.

*Whether your project is a long one, or perhaps commercially very sensitive, you may have some concerns about this method of working. We hope the following will address these concerns, but if not, please contact us to discuss any issues you may have. We aim to be as cooperative as possible!*

### **Our product is commercially sensitive, so we have some concerns about it leaving our premises.**

We can appreciate that you may be worried about releasing confidential material, where you would have little control.

- Firstly, we would like to assure you that we have worked on many sensitive applications and documents and always been completely aware of respecting our client's confidence and protecting the information. We are always happy to sign confidentiality agreements, as an extra guarantee.
- We would also refer you to our client testimonials for reassurance and point out that our past clients are willing to be contacted should you have any questions about the quality or confidentiality of our services.
- However, if you are still uncomfortable with our processes, we will discuss working on your site on a more regular basis, providing you are situated locally to our base. However, you should be aware that this has a cost implication.

### **Our project is likely to run for several months and we are worried about losing track of progress.**

If you have used contract staff in the past, you are likely to have supervised them with your own employees, so this can be a natural concern.

- Firstly, may we assure you that we have significant experience of managing documentation projects. Our initial project plan, which we agree with you before we start work, will outline all milestones and key deliverables. This will be contractually binding and will only change if mutually agreed.

**Please note:** Some of the agreed dates will require commitment from your own staff and Microfold cannot be held responsible if these dates are not set or are missed outside of our control. If dates are missed by your team, the project schedule will need to be renegotiated.



- We are happy to liaise with a key member of your staff to ensure continuity of information exchange. So that you can monitor progress, we can build in regular project status meetings and will supply regular update reports, as per your requirements.

### **Why do we need the full authorship service - we just need some advice?**

- Our brand “Complete Authorship” is a reflection of the breadth of our skills and what we offer, so you can choose to use as much or as little of our services as you wish.
- We offer a range of editorial services and will discuss these with you during the project briefing meeting. We will suggest the level that we feel is most appropriate for your needs and your budget.

*For example:*

- You may be confident that you have the appropriate resources in-house to produce the content for your documents but you need some advice on the best format. In that case, perhaps our *Bronze* editorial service would be the most appropriate, where we would check that it is written and structured appropriately for your intended audience and that the text does not contain any grammatical or typing errors.
- Alternatively, your staff may be too technical to produce a user-friendly help system for your product. In which case, we might propose our *Platinum* service, where we would write all the text from scratch.

*A more thorough description of our consultancy services is provided in our Products and Services catalogue; please ask for a copy.*

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