



Enhancing your communications

What is an IDP?

We have produced these guidelines to give you some information about how we will interact with your company on documentation projects that 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.

Our full terms and conditions provide more information on specific areas and are covered in a separate document. If you wish to review these, please ask us to supply you with a copy.

What happens after the briefing?

- During the initial project brief, we will take notes so that we can compile the details we need to create high level outlines of the documents or text you require.
- 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 *Documentation Set Plan*, (*DSP*) which will list all the individual documents relating to your project.
- For each of the documents, we will then produce an *Individual Document Plan (IDP)*. This will go into more detail and include such things as the proposed number of drafts, project deadlines etc.

Why is the IDP important?

- 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.
- Its purpose is to ensure that everyone understands what to expect from any work Microfold might do for you. It is also important to understand that the plan’s content does have an impact on our fees and so should be studied carefully, as changes at a later date could result in extra charges.
- Whilst 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. We therefore ask that you check this document very carefully.

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 you are happy with the *IDP*, please sign and return a copy to us, or confirm by email - whichever has been agreed.

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Please note: The *IDP* will also indicate what rights you will have to the final text. In most cases, this will be on a licence-to-use basis for the specified output only. If you wish to have wider rights or obtain full proprietary rights to the text, the work will usually be charged at a higher rate or incur a specific transfer fee. *Please refer to our full terms and conditions for more information.*

- 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.

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

How much will my project 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 initial *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.

- Usually, 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 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 and late payment could affect the project schedule and result in additional charges.)

Please note: The overall price may change if, at any of the completed phases, it is established that changes have arisen from the original source material that result in an unforeseen impact on the documentation.



What is the Scoping Exercise?

- 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. This will usually take the form of a more detailed *IDP* with a full table of contents.

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.

As per our usual terms and conditions, if applicable, proprietary rights to the written material will be transferred to you only when Microfold has received payment of the final invoice. (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.)