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April 2013

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publisher
tcworld GmbH
in collaboration with tekom, Europe's largest association for technical communication
CEO
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tcworld

magazine for international information management

From the editor

Scientists have long wondered how language influences our thinking. The British-Austrian philosopher Ludwig Wittgenstein once wrote: "The limits of my language mean the limits of my world". Although you might not entirely agree with this statement, it can't be denied that words have a genuine impact on the way our minds work. For example, researchers have found compelling evidence that our language impacts our sense of direction. There are languages, such as the Australian indigenous tongue Guugu Yimithirr or the Mexican Tzeltal language, which do not have any words for "left" or "right". To describe the position of an object in relation to another object, they use cardinal directions. One might say for example: "The child sits northeast of its mother." Or: "There is a spider on your southern foot".

Considering the fact that most of us couldn't comfortably say, which of our feet is currently the "southern" one, we can't help but wonder: Do users of these languages think differently than us? And, in fact, the answer is yes. Studies have revealed that speakers of Guugu Yimithirr and Tzeltal carry a mental compass with them at all times: They have a different understanding of the position of objects.

And, it is not just language that impacts the way we think and the way we see the world. Our upbringing, religion, culture and social experiences all have a deep influence on how we look at a situation – or how we perceive a product, website or app.

Fortunately, most companies don't face quite as herculean a task as localizing into Guugu Yimithirr or Tzeltal. Still, the ever-expanding range of locales and languages to adapt products and information for, has many organizations rethinking their globalization practices – looking for easier, more efficient ways to serve more markets.

In this issue we focus on website and user interface globalization. Alberto Ferreiro takes a close look at how we can incorporate internationalization already during the design stage (page 13). Don DePalma introduces localization proxy servers, a software that allows the automation of website globalization (page 11).

Joe Gollner writes about the advantages of intelligent content – content that is not limited to one media output or one purpose, but rather helps companies automate their documentation activities (page 17).

Kyle Wiens introduces iFixit, an online repair community, which has experienced staggering growth since its launch in 2003 (page 21).

Bernard Aschwanden summarizes his experience of working together with a diverse globally distributed team (page 24).

Establishing a presence on the Japanese market might well be one of the most challenging moves of any organizations. Elena Groznaya takes a look at successful international companies in Japan (page 27).

A recently conducted tekom-survey sheds light on the quality that translation buyers expect from their translation providers. Daniela Straub has the details (page 32).

Finally, we'd like to draw your attention to the upcoming tcworld Roadshow, a one-day mobile conference, which will travel through six European cities and connect technical writers from across Europe (pages 31 and 36).

We hope you enjoy our magazine!

Corinna Melville

Building your global website

Captivating text and eye-catching visuals are the two magic ingredients that turn a website into an esteemed, highly frequented platform and a powerful business asset. But how can we speak to users from different cultural and linguistic backgrounds? Of course, localization is the answer. Find out how you can achieve great localized websites and user interfaces.

page 10

The power of free manuals

An online community changes the way we look at our devices - and at technical communication. How iFixit creates user manuals that help to fix the world.

page 21

The issue of cultural balance in foreign firms in Japan

Establishing a presence in Japan is not simply a matter of "...do as the Japanese do", but rather a tricky balancing act between an established corporate culture and a strong traditional value system.

page 27

LANGUAGE IMPACTS BEHAVIOR AND HEALTH

According to recent research by Yale University behavioral economist Keith Chen, the language you speak plays an important role in how you approach saving money. This might seem absurd, but his research has shown a strong correlation between language and future decision-making.

"Languages force you to pay attention to time," Chen explains. Languages such as English, French, Italian and Tamil are what he calls "strong future-time reference languages" -- languages that have a different tense for the future. "Weak future-time reference languages," such as Mandarin and German, don't make as much of a distinction between the present and the future; in German, for example, "Morgen regnet es" translates as "it rains tomorrow."

The greater the linguistic distinction between present and future, Chen says, the less likely you are to plan ahead. That may be why speakers of future-less languages are likely to have 39 percent more wealth than their future-speaking counterparts by the time they retire. They are also 31 percent more likely to have saved more.

The study also found that future-language speakers tend to be unhealthier: They get less exercise, practice unsafe sex, and smoke more than their future-less language counterparts. According to Chen, they choose "current pleasure in exchange for future pain." He realizes that the whole premise sounds far-fetched, but his research has yielded statistical evidence showing that future-less language speakers are 24 percent less likely to smoke, 29 percent more likely to exercise, and 13 percent less likely to be obese.

http://faculty.som.yale.edu/keithchen

Technology trends impacting information infrastructure today

Research firm Gartner, Inc. has identified the top technology trends that will play key roles in modernizing information management (IM) in 2013 and beyond, making the role of information governance increasingly important.

"Information is one of the four powerful forces changing the way business is done," said Regina Casonato, managing vice president at Gartner.

The top technology trends impacting information infrastructure in 2013 include:

Big data

Gartner defines big data as high-volume, high-velocity and high-variety information assets that demand cost-effective, innovative forms of information processing for enhanced insight and decision-making. New forms of processing are not necessarily required to process big data. The most important aspects of big data are the benefits that can be realized by an organization.

Modern information infrastructure

IM is a discipline that requires action in many different areas, most of which are not technology specific. Central to success is an enabling technology infrastructure that helps information producers and information consumers organize, share and exchange any type of data and content, anytime, anywhere. This enabling technology infrastructure is what Gartner calls a modern information infrastructure. Because it must support a wide range of information use cases and information types, it is essential that information infrastructure be viewed as strategic, so that a vision to develop it in a cohesive and aligned way over time is possible.

Semantic technologies

Semantic technologies extract meaning from data, ranging from quantitative data and text, to video, voice and images. Many of these techniques have existed for years and are based on advanced statistics, data mining, machine learning and knowledge management. One reason they are garnering more interest is the renewed business requirement for monetizing information as a strategic asset.

The logical data warehouse

Data warehouse (DW) architecture is undergoing an important evolution. The DW is evolving from competing repository concepts, to include fully enabled data management and information processing platforms. These new warehouses force a complete rethink of how data is manipulated, and where in the architecture each type of processing occurs that supports transformation and integration. It also introduces a governance model that is only loosely coupled with data models and file structures, as opposed to the very tight, physical orientation used before.

NoSQL DBMSs

NoSQL DBMSs — key-value stores, document-style stores, and table-style and graph databases — are designed to support new transaction, interaction and observation use cases involving Web scale, mobile, cloud and clustered environments. Increasing adoption and growing customer demands have opened up a significant gap between commercially supported NoSQL DBMSs

and open-source projects that have only community support. The latter remain immature and are used by Web developers for applications that are not mainstream. Commercial products are using their added funding not only to build sales, support and marketing, but also to add enterprise-class features intended to widen adoption and win new business. The growth of the ecosystem will have an impact on broadening adoption.

In-memory computing

In-memory computing is an emerging paradigm, enabling user organizations to develop applications that run advanced queries on very large datasets, or perform complex transactions at least one order of magnitude faster (and in a more scalable way) than when using conventional architectures. In-memory computing opens unprecedented and partially unexplored opportunities for business innovation (for example, via real-time analysis of big data in motion) and cost reduction (for example, through database or mainframe off-loading).

Information-centric roles

Specific roles, such as chief data officer, information manager, information architect and data steward, will be critical for meeting the goals of an EIM program. The fundamental objectives of the roles remain constant: to structure and manage information throughout its life cycle, and to better exploit it for risk reduction, efficiency and competitive advantage.

Information stewardship applications

Governance of data is a people- and process-oriented discipline that forms a key part of any EIM program. The decision rights and authority model that form governance have to be enforced and operationalized. This means that this technology is needed to help formalize and combine the day-to-day stewardship processes of (business) data stewards into part of their normal work routines.

Information valuation/infonomics

Information valuation is the process by which relative value or risk is assigned to a given information asset or set of information assets. When considering how to put information to work for the organization, it is important to not only think about information being like an asset, but also to actually value and treat it as if it were an asset. Any number of established methods for valuing intangibles (for example, market approach, cost approach or income approach) can be used, or organizations can select valuation methods that map to non-financial key performance indicators.

The full report is available at www.gartner.com/resld=2340315.

Image: © Watchara Rojjanasain/ 123rf.com

Image: © Dan Kosmayer/ 123rf.com

Lingo24 warns brand name disasters can cost millions

In the wake of the recent Kia brand name issue, business localization expert Christian Arno of translation provider Lingo24 warns companies run the risk of wasting millions and damaging their brand's reputation by overlooking basic localization checks.

The South Korean manufacturer agreed not to sell their Provo model in the UK this week, after realizing the name was associated with the Provisional IRA during the Northern Ireland troubles. This had prompted Gregory Campbell MP, of the Democratic Unionist Party (DUP), to table a parliamentary motion stating it could be offensive to many of their victims.

Christian Arno, founder and managing director of Lingo24, warned too many companies fall into similar traps by failing to do basic research.

He said: "Getting the name right is one of the most important aspects of launching a new product. Companies pour millions into marketing campaigns, but this is all wasted if the brand name fails to translate for a foreign audience.

"In some cases, a silly sounding name just causes amusement, such as Ikea's 'Fartfull' workbench. But this case shows the wrong name can be highly offensive, and could potentially damage a company's reputation. It can be extremely difficult to localize a brand name for all markets, and companies need to do rigorous negative checking before investing in marketing campaigns. Still it is surprising to see mistakes happen at this level, with major global companies failing to do basic research."

Kia was praised for its swift action, but this isn't always the case. Some famous misnomers include Chevy's launch of the Nova in Latin America, which translates as "doesn't go", and the Ford Caliente in Mexico, where the name is slang for streetwalker.

Ikea is well known for its distinctive Swedish product names. But researchers scrutinized these carefully before launching in Thailand in 2011, changing names such as the Redalen bed, which translates roughly as "getting to third base" and the Jättebra plant pot, which sounds like a crude term for a sexual act.

Of course a little research and effort can pay off, when a brand name is a perfect fit in the target language. Nike is known as Nai Ke in China, with the characters meaning "Endurance Conquer". Nestle's KitKat sounds like the Japanese term for "good luck" - Kitto Katsu - meaning the chocolate biscuits are popular gifts for students taking exams.

Coca-Cola's name in China first read as "Kekoukela", meaning "bite the wax tadpole" in some dialects. After researching 40,000 characters, the company chose "kokoukole", which translates as "happiness in the mouth."

Image source: www.coca-colacompany.com

Image: © Maxim Kazmin/ 123rf.com

An automated approach to website globalization

Localization proxy servers:

Multilingual websites are – by nature – very complex entities. The sheer volume of content that needs to be translated causes many companies to refrain from localizing their websites into more languages. Is there a simpler solution?

By Donald A. DePalma

In Common Sense Advisory's most recent study of 2,409 of the world's most visited websites, we found that the top 50 firms from the Forbes Global 2000 typically provide content in 15 languages. However, those in the bottom 1,000 averaged just four languages per site, and some sites in that cohort supported just one or two. Why don't more companies support more languages on their websites to attract global visitors, increase international sales, and expand brand awareness? How can they go global faster and more simply? This article reviews traditional approaches to website globalization and a less complex alternative, localization proxy servers.

Our research has found a lot of reasons companies choose not to globalize a website. First, advocates need to convince executives of the opportunities. If they're successful, they then have to decide which languages or countries have the greatest ROI for their business. Finally, they must deal with translating the huge and growing volume of content into an increasing number of languages.

It's this last step that causes some companies to abstain. In their typical implementation multilingual websites are very complex entities. To offer a great customer experience, global sites must duplicate folders, templates, and application structures across tens of languages. With the infrastructure in place, they have to then translate their corporate content and any interactive components into all those tongues. Finally, they face a big struggle to keep those structures and the content that populates them current and consistent across all languages.

Companies often bring in complex workflow systems or a translation management system (TMS) to manage all the dependencies that a multilingual corporate site demands. This includes making sure that, once product descriptions have been updated in the source English or German, they are rapidly and correctly modified for the other 27 or 30 languages sites. The translation, processes, and infrastructure to manage it all require a major commitment in budget, process, staff, and technology.

How do they do that? Companies that have successfully globalized their websites have chosen from a broad palette of approaches to meeting this challenge.

Let's look at solutions at two ends of the spectrum.

Traditional website globalization

At one end of the spectrum, companies grow their global presence organically, letting each country build its own page and then clustering all of them behind a "global gateway," a single entry point with navigation to each country site. This approach allows all the country units of an enterprise to manage the translation of corporate content into their languages. This comes at a cost – typically each country has to duplicate translation, process, and technology, and must be responsible for tracking and reflecting every change at the corporate site.

In this laissez faire model, the resulting sites expend a lot of energy to offer the same content and customer experience from country to country. Built separately or even on the same basic templates, the sites are different. For example, we studied one high-tech company's global site that grew organically across more than 30 countries. Our spider search identified tens of thousands of variances in folders, content, translation, and interactivity. Such variations limit the ability of a company to provide a consistent brand message and customer experience.

At the other end of the spectrum, companies take a formal, architected approach. They create mirror images of the corporate site for each country or language they support. They often run this regimented model from a central corporate localization, use a TMS to manage the translation into all those languages, and define business rules to determine when to update the translations.

A mirrored architecture has great potential for providing the same experience in every market. Each site duplicates the corporate URL's structure and content. When such sites are first rolled out, the sites match up page to page, sub-page to sub-page, source text to translated target text. For example, German marketing pages are identical to their French and Chinese equivalents. However, that state doesn't last long. For example, on the second day the sites are live, the U.S. business unit adds new pages and folders to the site hierarchy. Over time, the various country sites resemble each other less and less as the website teams fail to match changes in structure and content.

Of course, in between these two poles, there are many variations. Regardless of where they fall on that spectrum, companies are always racing to keep the site designs and content current and consistent among all those countries and languages.

Automating globalization: The localization proxy server

There's a way to offer multiple languages on a website with much less design, development, and management work. In this model, companies install a specialized software that sits in front of their websites. This software – called a "localization proxy server" – intercepts web requests from a browser or other client app. It reviews each call to see whether it or the website itself should fulfill the request. If it decides that it's a foreign-language request, the proxy server turns to a database of stored or dynamically generated translations. Let's review in more detail how it works.

- A browser makes a request to www.wiesbadenterprises.com, the corporate website of a German company, Wiesbaden Enterprises GmbH. The proxy server intercepts the call and figures out what to do with it based on a variety of algorithms. As with any good web server, it uses geolocation to identify the country of origin and content negotiation to determine the preferred language.
- Wiesbaden Enterprises may also register domains such as wiesbadenterprises.de, .fr, and .cz for Germany, France, and the Czech Republic. However, when it activates those URLs, the company points its internet Domain Name System (DNS) addresses to wiesbadenterprises.com where a translation proxy server intercepts them.
- Once it has determined the browser's country, language, or intended destination, the proxy server decides whether the request should be fulfilled by wiesbadenterprises.com or by itself. For example, it sends German- and English-language queries straight through to the .com site, where visitors can personally decide whether they want to look at the German or English content. Some servers let the customer associate a particular domain with a language so that it always displays that language. For example, any request to the .cz domain always returns Czech. The proxy server supports other options, such as allowing visitors to select which languages they want to see.
- Where simplicity enters the picture, is when the proxy server fulfills the request. If it chooses to do the work itself, it turns to a database that maps all the pages in wiesbadenterprises.com to corresponding foreign-language content. For example, if a Czech- or Chinese-language browser asks for a particular product description or "about us" information, the server looks up that URL and delivers the Czech or Chinese translation for that page. More sophisticated proxy servers can localize web applications and personalized experiences, not just static websites that deliver the same content to everyone. Some proxy servers dynamically generate each page so that it contains not only a localized experience but a personalized one as well – shopping carts are one example.
- More sophisticated proxy servers can tailor experiences based on how a company operates. For example, proxy server administrators can specify content delivery conditions based on cross-border currency usage, privacy laws, content licensing, and products that are available in some, but not all, countries.
- These proxy servers often include systems that manage the translations. For example, Czech or Chinese text might be dynamically generated by machine translation (MT), or it could already be there, having been produced or edited by a human. These systems typically also monitor changes in the source content so that they can initiate a workflow request for all dependent content to be updated. For example, when English-language product descriptions are modified, business rules initiate translation workflows for all the supported languages – for fulfillment by language service companies, freelancers, or crowdsourcers.
- Through all of this, the web developers at wiesbadenterprises.com continue their regular work on the site. They change the source site as needed but never have to touch the country sites. Instead, they rely on the proxy server to automatically map the folders and other structures. The server continues to manage translations for each of the pages in the target languages, and monitors the source content for changes. The proxy server vendors typically provide hosting services for the mapping database and the translations, the workflow to connect with language service providers or freelancers, and hooks for integrating other software such as content management or machine translation.

The future of website globalization?

Over the last few years there have been an increasing number of suppliers developing such proxy servers, including Dakwak, Linguify, Lionbridge (managed service powered by Smartling), MotionPoint, Smartling, SYSTRAN, and Translations.com. All these suppliers offer some form of the operations described above. Where they tend to differ is in the approaches they take. For example, SYSTRANLinks provides an MT-centric approach focused on post-editing of fully machine-translated proxy sites. Smartling goes beyond the hosting model to offer an Akamai-like global delivery network that puts the foreign-language content closer to the consumers.

All told, the proxy server model can get a company online in multiple markets much more quickly than the usual architected build-out, and with much more consistency than a country-by-country approach. Most importantly, it eliminates site inconsistencies and instead limits the exposure to failure to update translations. While it doesn't decrease the need for translation, editing, and quality reviews, it does eliminate the overhead and headaches of keeping global sites aligned. For any company struggling to express itself globally, a proxy server eliminates some of the biggest problems in designing, managing, and keeping current global websites.

contact

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Designing successful global apps and websites

Unique but universal: Localizing user interfaces

Successful user interfaces, websites and apps owe their glamour to a combination of captivating text and eye-catching visuals. However, what attracts users in one locale, might appear bland or even offensive in another. So what makes a great, localized user interface?

Image: © Oleksiy Mark/ 123rf.com

By Alberto Ferreira

Let's imagine that you have designed a wonderful website with good functionality. It speaks directly to the user, it is informal and straight to the point. Your layout and design are impressive, harmonious, arresting. There is only one thing between you and global success: language. Your navigation bar is not adaptable to Chinese, your intuitive slide-down pages do not conform with right-to-left scripts, and your catchy titles are lost in translation.

As an essential component of human-centered design, user experience (UX) is often defined as the set of emotional and evaluative perceptions and responses that a user goes through while interacting with a given user interface (UI).

The ISO 9241-210 norm defines UX as "a person's perceptions and responses that result from the use or anticipated use of a product, system or service". Broad in its target, the psychological implications of this definition are nevertheless clear: UX is less a well-defined discipline than the combined sum of the user's emotional response to a specific product. A typical user is not looking for the color scheme details of an app's interface or interested in the harmonious streamlining of the checkout feature in a website: only the full, integrated experience matters. And, for the user, the product is only as good as its experience.

With appropriate metrics and an integrated perspective on product development, UX can help to differentiate a brand and maintain its identity by promoting improved usability and a greater adequacy to the user's actual needs.

A design-oriented company stands a better chance of creating products that are not prone to feature-creep while remaining usable and attractive. As a result support costs are reduced and customers are more satisfied. As an example, McAfee reported a 90% decrease of support calls after refactoring their user interface. After consolidation and establishing proper searching tools geared towards better accessibility, IBM's complex internal information network acceptance improved exponentially.

A lot of Google's and Apple's success is owed to design. Interface minimalism and optimization with only what is required for the user's most common goals constituted the basis for sound success. These principles remained consistent between different locales, thereby maintaining the brand identity, regardless of the target language.

Is localization part of the UX?

This question actually incorporates two different aspects: Should internationalization be taken into account during the design stage and does localization impact the overall effect of a product's UX?

The answer is, obviously, yes. Text is an essential part of a complete multimedia system that includes image and text. Visually and linguistically, text plays a major role in the user's perception of a product.

The most refined and sophisticated UX can be wrecked by careless localization and haunted by issues and bugs. Fonts are lost, carefully complimentary labels suddenly appear juxtaposed, HTML is improperly adapted to target locales.

Therefore, internationalization is key to a consistent user experience in a multilingual product.

Internationalization defines the set of processes and techniques that are implicated in making a product capable of adaptation to different cultures. This is where UX implementation is at its trickiest.

No sound internationalization-friendly design can be adequately implemented without an accurate study of localization prioritization. Define which languages and cultures you want to localize into and include both immediate priorities and future plans. This will enable you to optimize layouts for culturally-sensitive graphics and indications or – optimally – to change requirements in the light of new market strategies.

It is hard enough to achieve an optimal combination of consistent layout and sound text in any locale. Adapting a carefully laid out interface and its content to other target cultures requires thorough considerations with regards to branding and visual aspect.

A common misconception of localization associates it primarily with translation management of assets that are, to a very fixed degree, already established. However, incorporating localization from the earliest design stages will lead to websites that are bound to offering a more direct user experience.

TL, DR (Too long, didn't read) – Text and terminology

If you are familiar with Reddit's lingo (or indeed any forum, particularly of a technical nature), you know that verbosity and propensity are usually dismissed with a short concise expression. Most users take a similar stance when using a website or software application that is too fond of text for its own good.

It is not just laziness that drives most users to avoid interacting with overlong texts. In evolutionary terms, although oral language evolved over two million years, the first written symbols date from only 3500 BC, and the first alphabetic records date from 1000 BC. During our cognitive evolution, language became a natural skill, but writing appeared long after our basic brain structures were already in place. Therefore, unlike oral language acquisition, reading and writing are not innate skills in infants and have to be learned.

Since literacy is individually variable, and users typically want to avoid as much effort as possible, clarity is key for user acceptance and retention. A localized version of a product can emphasize functionality by upholding the following requirements in the master locale:

- Use consistent, simple, and task-focused terminology.

Image 1: A quirkily structured website generates navigation distrust while a linearly structured design makes it easier to gather and identify information.

- Use plain language (in advanced workflows, this can entail implementing Simplified English).
- Idiomatic expressions should be conceptualized and consistent (e.g. interjections, expressions, proverbs should be tagged as such and used in a consistent context).
- Avoid incomprehensible technical jargon.
- Avoid excessive wordiness. Use primarily short sentences with only one or two phrases.
- Avoid repetitive text and branding in the same window (e.g. having the company name on logos and in-context messages in the same screen).
- Use capitalization to clearly structure your on-screen content (e.g. use title case in the main title, but only sentence case for subtitles).

Keep in mind that reading on-screen is more wearisome on the eyes and takes almost twice as long as reading on paper. Therefore text density also plays a role in providing visual comfort for reading. Depending on the resolution, short lines with a maximum of 80 characters are a good rule of thumb.

Affinity, tone and humanizing

Everything we interact with generates a specific emotion suitable to reinforcement or repression. Regardless of culture, users are emotionally affected by the register and tone of the text. When adapting a product to international markets, keep in mind the four 'R' principles:

- responsiveness: provide feedback and ensure that the functionality is in accordance with the user's actions.
- respect: guide your users without being patronizing or smug about it (e.g. artificially escalating error messages and providing adequate feedback for user actions).
- relatable: the in-product text should have a unique voice and register. This does not entail a mascot or a fictional character (like the infamous Microsoft Office clip), but rather a direct addressing of the user by a unified subject. In other words, keep usage of pronouns consistent (e.g. "we have found an error…" instead of "<company name> has found an error…")
- relevance: localization-optimized UX keeps the master locale in line with user goals, therefore avoiding excessive and redundant information.

Typography and visual perception

The way different elements are perceived on screen, the harmony of the design, responsiveness and overall look generate deep emotional responses that often translate to either frustration or pleasure. The way visual elements are perceived and interpreted by our brain and our emotional response to them will determine whether or not we find a product or website attractive and whether we will continue using it.
Text is an essential element in any visual communication system. Its placement, layout and aesthetic are vital components of a successful UX strategy and often are the most determinant factors in conversion rate and customer base growth. Visible information – on the other hand – should be sparse, clear, concise and used in a relevant way. In this context, digital typography plays a major role in UX localization, as its proper implementation can provide users with an appealing combination of aesthetic appeal and usability.

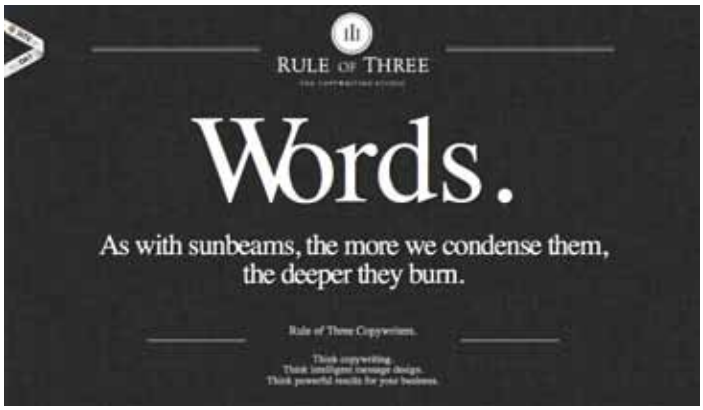

Image 2: The use of wide-font catchy mottos and clear titling and subtitling are essential to convey a sound information structure and capture the user's eye.

A good UX-oriented interface uses typography smartly. Text placement, layout and typographical arrangement are essential parts of the equation. Weight and scale are just two of the aspects that should be privileged.
The way the text is printed on-screen carries deep semantic implications for its meaning. Common fonts used in modern Western scripts are mostly based on sans-serif fonts. Serifs (aesthetic projections of letters meant to underscore their limits) were progressively eliminated from characters in order to save ink on printing. Also, sans-serif characters are easier to read in pages where there is a large density of text. Text design, such as the choice of font, can influence the user's interpretation directly. For example, Irish pubs worth their salt might have a sign with a Celtic font. This has cultural implications and is meant to provide a sense of familiarity. The same can be applied to websites with a strong cultural appeal.
When adapting a UX pattern into other languages, particular attention should be paid to the following items:

Avoid widows and orphans. Widows are single words at the end of lines, while orphans are single lines of a paragraph at the top of a column. These break text flow and compromise a harmonious look and feel.

Ensure kerning, tracking and leading are aesthetically sound. Regardless of the target script, ensure that kerning (the distance between characters) and leading (distance between lines) remains consistent in different target cultures. Right-to-left scripts such as Arabic or special pictographic languages such as Chinese often require leading adjustment as text density can increase dramatically.

Avoid centered text. Because of its variable margins, centered text gives a feeling of discontinuity.

Use grids as aids for localized layouts. A webpage or a desktop application layout can have an arrangement and layout adaptation facilitated by using a grid to visualize margins and limits in a clearer way (see Figure 3).

Embrace multicultural UX patterns

While standard UI patterns can generally be reused between different cultures, the way that these

Image 3: A grid system is essential when adapting a layout to different locales. Source: www.designer-daily.com/the-use-of-grids-in-website-design-6639

Image 4: Eye-tracking study regarding an American scan of a Google results page (left) and a Chinese scan of the results (right). Source: searchengineland.com/chinese-eye-tracking-study-baidu-vs-google-11477

are perceived will change according to the target culture.
Cultural differences need to be accounted for when refactoring graphics and, most especially, when adapting text. For instance, while headings are often the primary focus of interest for most European countries and the USA, an element's context and background perception are much more important for Japanese.
Several eye-tracking studies have shown that the typical user follows an 'F' path while browsing pages for information. Similar principles have influenced design and should be taken into account for UX localization: for European and American markets, keep the most relevant information or interaction options to the top and left side of the page. For Asian cultures, text can be more disseminated throughout the dialog or page (see Figure 4).

Be careful with color
This includes text coloring. As stated by the Institute for Color Research, we establish our opinions about a "person, environment, or item within 90 seconds of initial viewing, and between 62% and 90% is based on color alone". Do not assume that black will be the primary choice for text, as even hyperlinking (typically blue) can change the look and feel of a text in context.

Build an idiomatic lexicon
Terminology accuracy is essential to achieve technical consistency across multiple languages. However, colloquial expressions and idioms are a great way to capture your readers' interest. There is no better way to call on users' affections than to use idioms, proverbs and other figures of speech, which are often cultural-specific, and even specific to different regions or dialects. For that reason, the translation of sentences like the following can prove difficult:
"If you have any questions, be sure to drop us a line" or
"Subscribe and we will help you keep an eye out for new offers."
Proper transcreation cannot rely solely on the translator's arbitrary choices and tastes, and should instead be adapted to the desired locale by the use of a style guide and, ideally, consistent terminology usage.

Keep it simple
While pretty to look at, most complex interfaces with heavy use of graphics are typically more confusing than impressive when actually used in a productive setting. Consistency and simplicity pave the way for a smooth locale-independent source that can be then implemented in other locales. The modern return to basics with an emphasis on typography and minimalistic, sparse backgrounds and layouts is not a passing fad: adaptation into different devices and cross-platform rendering is made much easier with this arrangement.

Allow room for inference
While text can be used effectively in guiding the user towards specific points of interest, let users figure out the score by using visual cues and inference points. Users can interpret subtleties of speech more clearly if they are not buried under a torrent of text. For instance, when suggesting that a user introduced a password incorrectly and that the password is case-sensitive, it is redundant to tell the user explicitly to check the Caps Lock key. A much more user-friendly way to resolve this is to provide a pop-up while writing the password that notifies the user that the key is active.

contact

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A practical introduction to intelligent content

In contrast to traditional static content, intelligent content is not limited to one media output or one purpose, but rather helps organizations integrate and automate their documentation activities. In our global world, intelligent content is not something futuristic, but rather the key to successful and effective documentation processes.

Image: © Courtney Keating/ istockphoto.com

By Joe Gollner

Let's imagine that you are a specialist manufacturer of electronics that are used in the latest generation of smart phones. Business has been good over the last few years and everyone in your firm has worked hard to keep up with demand. You have been able to innovate with your offerings to remain a supplier of choice. You have been able to supply escalating volumes of components against ever shortening delivery schedules.

And now new challenges are appearing on the horizon as the needs of your customers are becoming even more complex. The challenges are becoming so demanding in fact, that addressing them will require that you enter into more and more joint ventures. Sometimes these ventures will be undertaken with major customers and sometimes they will be undertaken with direct competitors. You have done many of these ventures in the past. But now almost all of your projects assemble a network of suppliers and customers to achieve what none could achieve alone.

The question that arises in this scenario is a simple one: Can all the parts of your business respond to the types of challenges that this marketplace demands?

For our purposes, this becomes a question of how an organization should prepare and deliver documentation for its products and services in this brave new world.

The above scenario is not entirely fictional. Many readers will recognize all or part of it as something that is relevant to their work today as technical communicators or as managers of documentation teams. And it will not only be people working in the electronics industry who will be able to see themselves in this picture. Many will already know that documentation can become a highly visible part of these types of projects and not always in a good way.

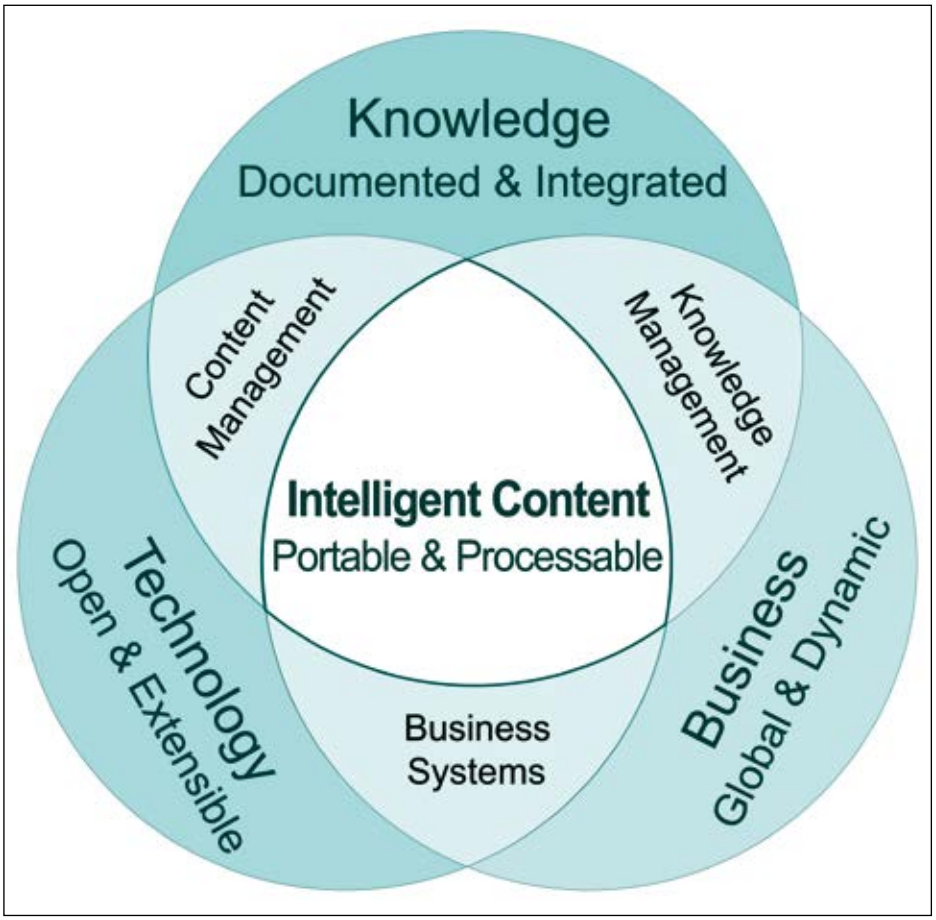

Image: Intelligent content addresses a wide range of demands

When static content reaches its limits…

Let's imagine our electronics supplier entered into a product development joint venture only to find that the changes it needed to make to its documentation were going to cost hundreds of thousands of Euros and would take months to complete. All they needed to do was replace standard texts and images with language and media adopted by the joint venture. Something was clearly amiss.

Meeting this type of requirement should have been simple. But our supplier's documentation had evolved over a course of years using a number of different desktop publishing tools. Documentation teams had worked hard at delivering high quality publications in accordance with a never ending series of enhancement requests. But now that the teams were being called on to do something quite different with their documentation, the limitations of how they had historically been working became clear for all to see. Unfortunately, these limitations attracted the interest of executive management.

So our intrepid electronics supplier had more to explain than just the fact that making some simple changes would require months of effort and a lot of money. The more serious problem lay in the fact that the other venture partners could not in fact use the supplier's documentation content except as large print-ready publications provided in the Portable Document Format (PDF). Within this joint venture scenario, each participant was required to contribute source content that could be integrated into a single coherent representation of the new product. And the ultimate vision for the venture was to provide a dynamic maintenance information service that customers would be able to integrate into the support platforms that they in turn provided to consumers. What was needed and what our supplier could provide were two very different things.

It becomes clear that our electronics supplier wouldn't be able to participate in this joint venture. There might have been a time when the company would have been able to secure its position solely through the strength of its engineering skills. But in a hyper-competitive marketplace, where the schedules and margins are too tight to permit workarounds, players need to be able to operate fully in a distributed,

dynamic, and almost completely automated way. And this includes how documentation content is planned, created, managed, exchanged and delivered.

Introducing Intelligent Content

Fortunately there is a solution to the problem that our dauntless electronics supplier has encountered. Essentially, the world has moved on, quite dramatically, from the time in which its legacy documentation tools and practices were sufficient. In a marketplace that is global, integrated and continuously advancing, the blunt truth is that all businesses must operate in a way that makes the most of state-of-the art technology.

It is essential because it is with effective automation that businesses can shorten cycles, trim costs, and adapt to the unique needs of every customer. Out of these three things, it is in fact the ability to adapt to each new requirement, that is the most important of all. When it came to its documentation processes, our electronics supplier had discovered its content to be very restricted. As our example highlighted, what our electronics supplier really needed to do was to handle its content assets with the same level of precision and adaptability that it applied to its engineering work. The documentation process essentially had to catch up with the rest of the business and with the demands of a global, and increasingly digital, market.

This is where intelligent content comes in. In very simple terms, intelligent content is content that has been prepared using open standards so as to be both portable and processable. In being portable, intelligent content can move between organizations and platforms. Portable content, for example, can be shared across a joint venture and be integrated from many sources to produce a single, authoritative representation of a product. In being processable, intelligent content can be processed by software applications that support a wide range of activities. Processable content can be analyzed, searched, filtered, rendered and reconfigured in an unlimited number of ways. Intelligent content, in being both portable and processable, can be used to address the types of demands that are becoming commonplace today.

Returning to our example, let's picture a customer of our joint venture planning to release a Mobile App through which to support consumers. Our maintenance information service, if it is fueled by intelligent content, would be able to dynamically feed tailored content directly to users of this App. And the content tailoring would be something that would be continuously refined, so that users would receive details that were precisely matched to their device, their location, and even their activities. It should be pretty clear that large PDF documents, produced using legacy authoring and formatting practices, are not going to be particularly helpful in this scenario.

It is for this reason that intelligent content has emerged as a label for a set of documentation tools and techniques that have been gaining ground steadily over the last twenty years. It is

in fact reassuring that intelligent content is not something new and flashy. It is really just the application of the same automation and engineering discipline to the business of documentation that has also revolutionized the global economy. And that's why intelligent content should not be seen as optional. If your business operates on a global scale – and in a way all businesses do – then it will be essential that intelligent content becomes a centerpiece in how you plan, create, manage and deliver documentation services.

The composition of intelligent content

We should, at this point, be quite specific about what open standards we are referring to as integral to the nature of intelligent content. Fundamentally, intelligent content leverages the Extensible Markup Language (XML) to ensure that content resources are created and maintained in a way that is fully portable and highly processable. There is clearly more to it than this simple statement implies. We need to keep in mind that XML really just provides us with a standardized way to define the markup that we will use in our content. XML does not tell us what markup practices we should actually deploy.

One of the major benefits of the long history behind the use of open standards for content processes, is that we have learned a number of important lessons about how to use XML wisely. One of these lessons is that it is advisable to adopt, apply and if necessary adapt, existing markup practices – especially those that enjoy broad support. It is for this reason that discussions of intelligent content invariably reference industry XML standards that have been developed within different sectors. These standards are valuable in part because they reflect the proven practices and data naming conventions that are prevalent within the applicable industries. Some of these standards in turn leverage the lower-level markup structures, such as paragraphs and lists, from the Hypertext Markup Language (HTML) because those structures have become so familiar to authors and so widely supported in different software tools.

It is a feature of intelligent content that the application of open standards to an organization's content resources is done in a way that makes it as easy to support and leverage as possible. Intelligent content is not, just to reiterate this point, an invitation to create a new and complex markup language based on XML that will require a small army of developers to implement and support. As our examples have shown, intelligent content is really about integrating an organization's content, and associated documentation processes, into the mainstream flow of how that organization does business.

Intelligent content is about making sure that the documentation processes never become an impediment to how the organization adapts to a changing marketplace. On the contrary, intelligent content should help an organization to forge relationships and exploit opportunities that would not be possible without content resources that are fully portable and highly processable.

Current trends in intelligent content

The movement to adopt intelligent content as a guiding principle, even if under a different name, is gaining momentum. And this is visible in all sectors of the economy. We have already touched on a key reason with the need for organizations to integrate content processes into the core fabric of its business activities. Closely related to this is the competitive pressure to drive out costs and delays from every business process and to do so by continuously advancing the level of automation being applied.

There are other forces promoting the adoption of intelligent content as an innovation strategy. Another force being widely felt is the push for businesses to effectively address global markets. Intelligent content tools and practices can be deployed so that the costs of content globalization can be kept as low as possible. Intelligent content, to meet this need, is consciously engineered so as to eliminate the redundancies and complexities that unnecessarily inflate translation costs. Similarly, intelligent content can be designed so that the information being provided to consumers in each market is as usable and effective as possible. In a world where there are no secondary markets, intelligent content helps organizations to adopt an aggressive posture when it comes to tackling opportunities anywhere in the world.

The adoption of intelligent content in specific industry sectors can also help us to better understand the trend. In the commercial publishing industry, the emergence of eBooks and the mobile device as a key delivery channel has forced publishers to embrace intelligent content after many years of procrastination. Only by leveraging intelligent content can publishers deliver eBooks to all of the different platforms and do so with a balance of cost and quality that is attractive. In industries such as pharmaceuticals, manufacturing and aerospace, intelligent content is deployed in a way that establishes complete lifecycle control over – and end-to-end accountability for – all content resources that support the design, development, deployment and evolution of complex systems and processes. Within government environments, intelligent content is being deployed to establish smart regulatory frameworks that reduce costs and improve overall results on a system-wide basis in sectors such as healthcare and finance. It is in fact difficult to find a segment of the economy where intelligent content is not being successfully adopted and applied.

Intelligent content is not something mystical or futuristic. Intelligent content is simply a grounded approach to making content resources portable and processable so that organizations can integrate and automate their activities efficiently and effectively. It is really a call to bring automation and engineering discipline into the business of content so that documentation processes can play a full and constructive role in the marketplace of tomorrow.

contact

Joe Gollner is the Director of Gnostyx Research Inc., an independent consultancy and solution integrator that helps organizations to make the most of open markup standards and intelligent content technologies. He has been active in the content management industry for over twenty years and has led many large-scale enterprise implementations. He is a graduate of Queens University (Bachelors of Arts, Literature and Mathematics) and of the University of Oxford (Masters of Philosophy).

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The power of free manuals – how a global repair community aims to fix the world

An online community site changes the way we look at our devices – and at technical documentation. How iFixit creates user manuals that help to fix the world.

By Kyle Wiens

When I was 18, my laptop slipped off the corner of the bed. The iBook fell onto the floor and broke – a single accident that changed the course of my entire life. That moment indirectly lead to the creation of two companies – iFixit and Dozuki – and drove two college freshmen to invent a brand new form of documentation.

At the time my computer broke, I was a freshman Computer Science student at Cal Poly University in California. I'd always had a penchant for tinkering, and I decided that I wanted to repair the computer myself instead of buying a new one. After all, mine was a good little computer. It had served me well throughout the years; it didn't deserve to die before its time. So I searched the Internet for Apple's official iBook service manual. The service manual wasn't anywhere to be found. I learned that weekend that Apple didn't like to share repair information with the public.

Not to be defeated, I wheedled Luke Soules, my roommate and a first-year Industrial Engineering major, into helping me out. We were both engineers, after all. We should be able to figure out how to fix a computer, we told ourselves.

As it turned out we were wrong. After some poking and prodding and guessing, we managed to take the computer apart and replace the broken part, but – without instructions – we weren't able to get the iBook back together correctly. It took a long time, some strong language, and a ton of frustration, but, eventually, the computer whirled back to life again. Unfortunately, it never worked as well as it did before we tried to repair it.

Image: © chode/ 123rf.com

Luke and I learned something from this experience: people need reliable, easy-to-understand repair information. Apple didn't make the information publicly available, so we decided to write our own repair instructions for Apple devices – from scratch. We dismantled an Apple computer, wrote a repair manual, and put it online for free. The first weekend, we got over 10,000 hits. And so, iFixit was born: a free, open source, publicly-editable database of repair manuals.

Fix it yourself – from espresso machines to iPods

Ten years later, and iFixit is the only organization on the Web with a repair manual for every single Apple product on the market. Those initial manuals have spawned an entire ecosystem of repair information – not just for Apple products or even computers, but for anything that is fixable. iFixit hosts over 10,000 repair guides, on everything from espresso machines to iPods. And that number grows every single day, as iFixit's user community authors add more guides to our site.

iFixit is based on one simple premise: it should be easy for people to learn how to fix things. And it worked. Millions of people – from New York to Alaska, Tibet to the Faroe Islands – have used our guides. They have saved money, have kept their devices out of landfills, and they have fixed something completely on their own.

As the company's founders, iFixit has taught us how powerful repair, service, and maintenance information can be: How it can teach people to do amazing things, how it can bring people together, and how it can solve institutional problems.

A new kind of documentation

Teaching people how to fix delicate electronics is incredibly hard – especially if they don't have any previous repair experience. When we first started iFixit, Luke and I asked ourselves, "How can we make our instructions so simple that absolutely anyone can follow them?" We looked around for inspiration: we combed through instructional websites, old IT repair manuals, and giant three-ring binders full of computer guides and assembly information. Frankly, what we found disappointed us. Every single day, technology races ahead. Every day, some visionary comes up with a design for the next life-changing gadget, or software, or manufacturing machine. Every single day, our lives are enriched through new forms of innovation. But for some reason that Luke and I didn't understand, documentation has stayed exactly the same: static, difficult-to-understand, lifeless books of information. Even online instruction manuals were suffering from a lack of imagination. They were PDFs, essentially books copy-and-pasted into a digital format. That wasn't good enough.

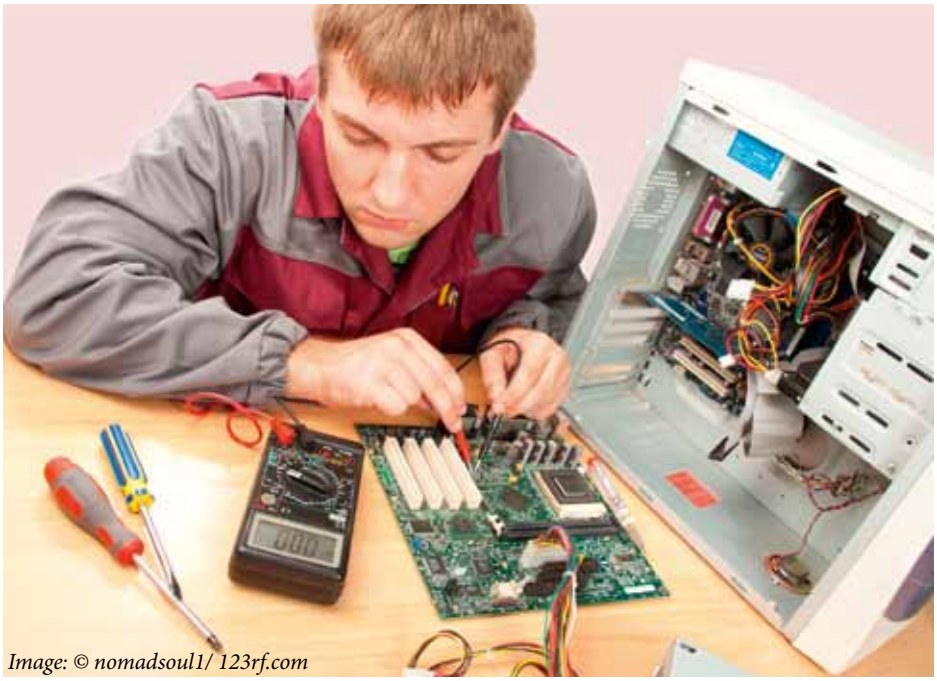

Image: © nomadsoul1/ 123rf.com

If we really wanted iFixit's user community to complete their repairs successfully, Luke and I decided that we had to go back to the drawing board. We needed to invent a new form of documentation – one that felt interactive and real, like an expert was standing at your shoulder telling you which screwdriver to use, where that tiny wire goes, and what steps should be approached with special care.

Over the years, we developed some pretty strong opinions about documentation, and about what makes it effective. These are the principles that iFixit was built on:

1. Great instructions make people awesome: Instructions are important. Done right, a manual teaches someone how to do something they wouldn't otherwise be able to do. Plus, it keeps them working safely and swiftly.
2. Information needs to grow better over time: Instructions go out of date far too quickly. Manuals need to be easy to update, easy to edit, and easy to change. That way manuals never get old; they just get better.
3. People need manuals as mobile as they are: Instructions that go where people go – under cars, in the field, jammed into tight corners. Mobile instructions on phones and tablets give manuals a farther reach.
4. High quality media makes documentation more effective: Sometimes, words aren't good enough. Videos, diagrams, and (especially) photos make text instructions easier to follow.
5. The best manuals make hard things easy to learn: Great instructions are as transparent as you can make them. They should be so simple, so instructive, so detailed, that absolutely anyone can complete them.
6. Communities grow around content: Interactive manuals encourage people to share their knowledge and find better ways of doing things. Feedback and Q&A features should be a part of every manual.

A real-world education

It didn't take us long to figure out that, in terms of documentation style, we were doing things differently than everyone else – and, maybe, a different perspective could be a good thing. We started partnering with Cal Poly University to bring iFixit's guide-writing techniques into the college classroom.

We wanted to give students an experience in how much impact technical writing can have. As part

of the project, student groups receive a single device to work on. They open it up, figure out what makes it tick, and build their own repair guides with step-by-step instructions and high-resolution photos. Once the guides are peer-tested and iFixit-approved, they go live on our site and actual people get to use them.

Doing the project gives students a sense of how critically important repair guides are. Sometimes, the guides a student group posts are the only repair resource available for that device. And people use them. Some student guides have been viewed over 10,000 times. As they check the page views, the students eventually come to understand that their work is making a difference – and not just to the person who completes the repair. Great instructions can make the whole world better.

Keeping gadgets from becoming landfill

Every single year, 20 to 50 million tons of e-waste are generated worldwide. It's growing "at three times the rate of other kinds of rubbish, fuelled by gadgets' diminishing lifespan and the appetite for consumer electronics among the developing world's burgeoning middle classes," says The Economist. And it's only going to get worse. The volume and weight of global e-scrap will more than double in the next 15 years, Pike Research reports.

E-waste has a habit of finding it's way across the ocean to places with comparatively lax safety and environmental standards, like Guiyu in southeast China and Agbogbloshie in Ghana. It provides a lot of people with a steady livelihood, but it's also an incredibly dangerous career. Workers, including children, do their jobs without the protection of masks and gloves. What they can't repair or reuse is dismantled for resources. Sometimes, the easiest way to get to the precious metals inside electronics, like copper, is to set them on fire or dissolve them in acid baths. Then toxic chemicals leach into the air, the water, and the soil – and stay there, poisoning people for generations to come.

Recycling old electronics is a better option than just throwing them away, but it's not a real solution. We cannot yet recover many materials, including a number of rare earth metals in electronics. Only 20 out of 50 elements in a cell phone, for example, are recoverable in recycling. Plus, it takes massive amounts of energy and resources to produce a single chip in even the most mundane of electronics. The IT and Environment Initiative reports that a 2 gram, 32 MB memory chip requires 1.7 kg of fossil fuels and chemicals to manufacture and use. Recycling and incinerating an electronic wastes the embodied energy in the device; reuse and repair, on the other hand, keep the device around longer, so it can go on (at a more affordable price) to a second, third, or fourth owner.

Every guide that a student writes is a real-world education in just how powerful great instructions can be. Since 2009, the project has expanded to 13 universities and thousands of students. Their contributions will go on to make a difference in the world long after the students finish their course – and that's something students can be proud of.

Instructions can remake businesses

We designed our guides to be different, to be better. We hear repair stories from people everyday – men, women, and children around the world who used our guides to fix iPads, cell phones, MP3 players, and more.

Somewhere along the line, it occurred to us, that our guide-making technology might be useful for more than just fixing electronics. If our guides could teach people with absolutely no experience to perform high-level repairs, we figured they could help people learn how to do just about everything.

We opened up our guide-making software, Dozuki, to companies interested in dramatically reimagining their work instructions and service manuals. Instead of compiling instructions in massive, unwieldy binders that gathered dust on some shelf, we thought that instructions should be put where workers really needed them – on the shop floor. Deployed on iPads and always within reach, we felt that effective instructions could standardize work, train new employees quickly, and enable a more productive, safer workflow.

And they did. Manufacturers, in particular, have used Dozuki's guide-making technology with great effect. We've partnered with industry giants, like Tesla and Haas, to completely revamp their work instructions and service documentation.

At Cal Poly University, our work instructions cut down student training time for machine maintenance by 75%. At International Telematics, our step-by-step service documents, deployed in the field, helped the company realize a 60% reduction in support requests, despite a 300% growth in the number of installations per week.

Rethinking documentation

As much as people sometimes disparage technical writing and instruction manuals, they are incredibly important. Manuals and guides are teachers – they can accomplish amazing things. iFixit guides have empowered millions of people to fix their electronics – which has kept countless electronics out of incinerators and landfills. In the business world, Dozuki guides help companies make huge productivity gains. But our experience has taught us that in order to be really effective, documentation has to be drastically rethought. Guides and manuals have to be designed to be effective in the world we live in today – not the world that we lived in 40 years ago. It's the only way that documentation will ever get the respect and the attention it deserves.

contact

Kyle Wiens is the co-founder and CEO of iFixit, the largest online repair community. iFixit is dedicated to helping people everywhere keep their hardware running longer. In 2011, he started Dozuki, a software company that helps manufacturers create effective step-by-step work instructions and service documentation.

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Delivering successful projects with global teams

Unequal time zones, dissonant expectations, and different work ethics – these are just some of the issues that international project teams are facing. So how can we ensure global team success?

By Bernard Aschwanden

This case study examines the release of the Adobe FrameMaker 10 Reviewers Guide and my personal lessons learned in working with an international team. My role was to beta test FrameMaker and to create a reviewer's guide together with a team in India, Canada, and the United States.

Image: © Ratchanida Thippayos/ 123rf.com

Defining a team

When a group of people comes together for a project they are called a team. People of the same team share goals and leadership. Within the scope of their project team members depend more on each other than on people outside the core collective. They have a goal and are assembled to meet that goal. In our case, we were a team pulled together with a focused goal of building a specific documentation set for a project. We had our roles, and we needed to trust each other to deliver to set expectations.

Background

Our goal was to develop a reviewer's guide. This entailed multiple versions of an interactive multimedia PDF document with video, audio, and detailed tasks. The project was to be done by a selected team of people who each had specific responsibilities to meet. Working together we expected to deliver the guide within about three months, on time and on budget. Geographically, the project involved India, Germany, California, Canada, and even the beaches of Hawaii – possibly not the most common places that come together within the lifecycle of a project. Over the course of the project change is inevitable, and it is important to understand where you started and be able to look back.

Lessons learned:

- Set team goals early.
- Keep an original copy of the project plan or charter to compare results against later.

Setting expectations

Initial communications via email helped to form our team and to establish roles. We quickly discovered a desire to meet in person – if or when possible – and to stay in regular contact with each other. The more information we could share, the better. As it turned out, the product

manager, who was based in India, and myself, based in Canada, would both attend a conference in San Diego, California, so we agreed to meet there. This in-person meeting was great. It gave us a good idea of who would be in charge of what parts of the project, what our skills were, and helped to set expectations. An in-person meeting provided a good starting point to get to know each other. We took time to outline the project in general, identify who may be needed for the work, and set a plan regarding what needed to be done to make the project successful.

Lessons learned:

- Communicate often and openly.
- Set clear expectations for each team member.
- Establish competence levels for all members.
- Have a vision for your project.

Initial processes

After our in-person meeting, we identified deliverables. There was agreement on what would be built, when it would be delivered, and what quality was expected. Initial ideas for content quickly grew to many pages. Once defined, a draft was delivered, evaluated, revised, and resubmitted. At this point we had a clear picture of what we needed and how to ensure it was correctly delivered.

Lessons learned:

- Prototype so that each team member knows the expected standard.
- Know who controls what part of a project.
- Understand final quality levels.

Resource management

We needed servers, software, recording gear, and several skilled experts to help write and manage content. Since we knew exactly what had to be delivered, we could create better estimates of time, cost, and resources. This could be compared against the expected budgets that Adobe had set. Where we encountered discrepancies, we had to work together to give and take. It was clear that sometimes one person or another would pick up more or less work to help everyone succeed. That's a part of being a team.

Lessons learned:

- Compromise where needed to ensure teams are properly resourced and that realistic expectations are set.

The impact of geography

We started to develop materials with a team of two people in Canada, a team in India, and a head office in San Jose, California. We spanned 13.5 hours of time shift between us. Our task was to create materials, review feedback, update content, republish, share files, and track budgets. In many cases, the distance between us wasn't the issue, but the time shift was. Stress developed over team members' concerns about missing deadlines or not providing the right information. Timing for meetings often meant that someone had to get up very early or stay up very late and we needed to be aware of each other's needs. We spent many times simply trying to find hours to meet!

Lessons learned:

- Co-ordinate schedules.
- Compromise when needed.

Expected completion

The team expected that the project would be done by early December. When it became clear that this wouldn't happen we moved the deadline to mid December with the hope of having completed content before Christmas. Even this extension could not be met (for many reasons), and we needed everyone to understand that there were delays, that there were holidays coming, and that we needed further extensions. Together, we re-evaluated deliverables and deadlines. The team agreed to more realistic timeframes for final delivery.

Lessons learned:

- Conditions change and teams need to be flexible.
- Communications and compromise make it easier to agree to change.

Project creep

Due to an extended set of topics to deliver, new formats to deliver in, and additional processes that had been put in place, the team had an increased workload, but originally didn't have the time to complete it. What we did deliver was seen to be of high quality and met all expectations, but the volume impacted timelines. We also had some issues with the international nature of the project (time zones, holidays, other responsibilities) that impacted the delivery dates. Each member of the team had other priorities that would draw away energy and focus. By revisiting the original plans we could make changes that all of us agreed to and reset our course.

Lessons learned:

- Compromises during a project may result in more effort, so revisit your original project charter along the way.
- A clear understanding of project targets, and a willingness to adapt as the scope changes, results in more support from all.

Delivery

When done, we provided the legal and engineering teams with our content for review. The expectation was that minor cosmetic changes may be needed. We had managed to deliver 31 files within the restated timeline. However, the team was then tasked to also create several portfolios with cover pages, introductions, scenarios, links, and redeliver this content. People outside the core team added requirements beyond the original scope. More stakeholders emerged with specific requirements.

My own schedule had me in Hawaii for a family vacation during this time. With the new requirements we had to continue to work even from the beach! However, people accommodated the time change, and the need for personal time to relax with family.

Lessons learned:

- Set a charter early.
- Ensure all stakeholders are identified (including those outside of the immediate team).
- Change happens, be adaptable.
- Accommodate for the team members' holiday time when possible.

Project conclusion

After completion of the project, the team decided to write a case study to identify how things had changed over the course of the project, how we dealt with these changes, and why the project succeeded. The general understanding was that change occurred when people who were not originally included in the team became involved. By remaining in constant communication with each other, meeting each other personally, and remembering that everyone involved is a person, not just "a resource", we worked through any issues and resolved them before they became problems. The project success was due to the way that people worked with each other.

Lesson learned:

- Projects are run by people. Teams consist of people.
- Regardless of geographic or time divides, the people make or break the team.

Conclusion

The project taught us a lot. Time estimates shift, reviews take longer than expected, delays occur. If you can define deliverables, communicate well, support scope changes, work with competent people, ensure you collaborate well and often, set clear expectations, and commit to the project – then a team of good people can accomplish almost anything. The geographic divide was huge, but our international team worked because we understood each other, respected each other, and agreed that if any one of us failed, then the entire team would fail. We worked together to ensure team success and we each succeeded individually as well.

Since this project was completed many of the team members have moved on to other projects. We've also regrouped a few times and delivered as expected, applying what we learned on our first team project, and we continue to work well together.

We keep communication open, use the tools we have to their full capabilities, and – since we are global – we strive to accommodate time, culture, family, and work in order to keep a healthy balance.

Final delivery

What we provided looks sharp. We have received compliments on it, and Adobe sees value in it. The materials provide clear demonstrations to new users, people who upgrade, or to those looking to learn about FrameMaker 10. And, as a final word, the product management wrote to the team to let us know that they "love it!! A good showcase of FrameMaker as a DITA authoring tool (since we created the content in DITA), single sourcing and reuse (we re-used topics extensively across multiple reviewers' guides) and showcases the Adobe Technical Communication Suite functionality (embedded Adobe Captivate videos, rich media, PDF and online delivery, etc.)"

contact

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The issue of cultural balance in foreign firms in Japan

No modern-day culture is quite as distinctive as the Japanese, no market quite as peculiar to Western companies. Establishing a presence in Japan is not simply a matter of "…do as the Japanese do", but rather a tricky balancing act between an established corporate culture and a strong traditional value system.

Image: © Takayuki Ishihara/ 123rf.com

By Elena Groznaya

A corporate culture that corresponds to the interests of employees is a crucial element of success and will inevitably impact on business. This idea, that received a lot of attention in the last decades of the 20th century, continues to occupy the minds of both managers and academic researchers today. It is challenging enough to create a positive and motivating organizational culture within the borders of one organization and one country. However, challenges multiply and develop in often unpredictable directions when a multinational corporation has to construct an effective corporate culture that matches the values and expectations of employees in its foreign subsidiaries.

National versus corporate culture

N. Adler, an expert in the field of intercultural management, argues that national culture in a multinational firm outweighs organizational culture. The experiences of foreign multinational corporations (MNCs) in Japan provide us with great examples of a sensitive balance of corporate and national cultures within an organization.

The Japanese market reality

It is a priori not an easy task to enter and succeed in the distinctive Japanese market reality. Studies emphasize that a foreign firm aiming to enter the Japanese market will typically have to work its way through a number of structural obstacles, such as the influence of all-embracing, virtually impenetrable corporate groups (keiretsu); complex distribution; high business costs; particular customers' expectations; and last but not least the peculiarities of the Japanese labor market and the lack of personnel with the required qualifications.

One of the major difficulties that organizations new to the Japanese market – especially those of small and medium size – have to face, is the task of attracting and securing highly qualified personnel. The limited ability of foreign firms to provide life-long employment, being alien to the Japanese organizational culture and – as recent research shows – an inability to generate employees' loyalty, have negatively affected the image of international corporations. The Japanese are accustomed to the traditional idea of a safe and comforting long-life employment, providing family-like work relations and a tenure-based reward system.

Such negative perceptions, however, are becoming outdated. Recent studies show that MNCs offer practically as much employment stability as most of the Japanese firms. Post-bubble economic changes and crisis-related lay-offs within Japanese companies caused inevitable adjustment of traditional employment practices and negatively affected the employment of both young graduates and mid-career specialists. Nevertheless, foreign companies are still perceived to be a more risky choice for potential employees: the vast majority of university graduates still prefers to be employed by a home-country company rather than a foreign firm.

Attracting and retaining qualified personnel

At the same time, both the organizational culture and the policies of MNCs seem to offer a number of advantages that would appear to meet the expectations of younger and particularly female participants of the Japanese labor market. These include promising gender-, age- and tenure-independent career opportunities. Most of the multinationals seek to create a diversity-friendly environment and a merit-based promotion system. Another important advantage is an access to international exposure and a chance to practice foreign language skills. A lack of opportunities in the local labor market for mid-career and female professionals is another critical aspect. Japanese corporations prefer to hire male university graduates with the purpose of eventually training them to become well-integrated, committed company members.

Nevertheless, keeping in mind the strongly limited choices regarding employees, foreign multinationals have to make a considerable effort to attract and retain qualified personnel: there is strong evidence that the personnel of foreign multinational firms show a lower degree of commitment in comparison to traditional Japanese organizations.

One of the major reasons for this is a certain degree of discrepancy between employees' expectations and the existing corporate culture. The work culture of multinational firms is like

an unbalanced scale, with the home-country business culture on one dish and the contradictory present-day Japanese culture on the other. In addition to the standard complex issues of creating an effective corporate culture, this situation is a perfect reflection of the puzzling process of transformation within the Japanese society, where elder and younger generations are often completely alien to each other.

Fair doesn't mean equal

It is a well-known fact that in order to succeed globally, a company has to consider the cultural specifics of the host-country and implement a certain degree of localization to adapt its practices to those traditional in the new market. Most foreign MNCs operating in Japan had to build a new corporate culture for their subsidiaries and implement new business practices partly based on effective policies of other subsidiaries and headquarters.

Some practices well approved in other locales, might not be applicable in the Japanese market. A good example of this is a Western corporation's attempt to introduce a highly-variable, performance-based reward system in order to balance labor costs with an employees' actual performance and to increase motivation. Such an initiative conflicts with the traditional Japanese principle of seniority and is either very slow to be implemented or is simply renounced.

An American expatriate in Japan working for one of the Forbes World's Biggest Companies, explains: "There is no link between job titles and performance plus intelligence in Japan. In fact, most of their rewards are linked to the time with the company, gender, and behavior and has very little to do with capabilities and performance. Recently, my company has been trying to change the performance review process in Japan to align it with global standards, but it has been almost impossible. Somewhere along the line I realized that Japanese have a different meaning for the words "equal treatment" versus "fair treatment". While pay for performance is intended for the "fair" treatment of employees' contribution to the business, Japanese people feel it is "not fair" because it is not "equal to all". I have a hard time explaining that … shall I say 'Tanaka-san does not earn his 100% bonus simply by showing up to work and sitting at his desk for 14 hours per day, even though he may be perceived as dedicated and hard working. Maybe it is indeed Mizumoto-san, who worked only 7 hours per day, who deserves 150% bonus for his unique efficiency and excellent contributions to the business outcome?'"

"Japanization" through Japanese middle managers

The significant factor that inevitably affects the corporate culture of a foreign firm is the strong culture of predominantly male Japanese middle-managers that serve as mediators between top management and the rest of the organization. In addition, most foreign firms in Japan tend to employ Japanese human resources managers and consequently extensively adapt to the Japanese style of management. This new issue of perceived excessive "Japanization" on one side offers advantages of adjustment to the distinctive Japanese organizational culture and market. On the other side it appears to compromise performance and motivation of younger generations of employees.

In spite of the intended liberal and open culture, the reality in foreign firms seems to be quite different. The consequent conflict of expectations negatively influences the satisfaction and commitment of a significant part of the qualified Japanese staff. A considerable number of young, often female employees of foreign firms express their concerns about the existing "glass-ceiling" of the promotion system: Transparent, yet unbreakable for them it benefits only foreigners or Japanese males with the appropriate tenure and degree of loyalty.

While running interviews with employees of foreign firms in Japan, I often heard the opinion that foreign companies become very Japanese in Japan.

Interviewees often shared their dissatisfaction: "I feel quite stressed, because I have to adjust to the strong influence of the Japanese culture in the company… I joined a foreign company because I would be able to use the English language, work in a foreign environment, have career development chances and more personal freedom and work-life balance. I thought it would be easier to work for a foreign boss. But I work with a Japanese team. In general, foreigners try to be more equal and liberal. But Japanese managers have a traditional mindset. Even if the company offers some policies

not typical for Japan, Japanese people are reluctant to do something because of others. They worry about what the others or the boss will think. I am not sure if foreign managers are aware of that."

A number of expatriate managers seems to be not fully aware of the influence that the Japanese traditional culture has in their company. The others can see these tendencies but consider them to be absolutely normal for Japan as they reflect traditional society norms.

One expatriate with three-years experience in Japan shared his view: "Most of the middle-level managers of our company are Japanese. Most of the employees of our company are Japanese. In spite of the fact that we have a considerable number of foreigners, the Japanese employees still outweigh them. They bring their own culture that is difficult to change. We provide trainings on our corporate culture. Nevertheless, my experience shows that as Japanese say 'The nail that sticks out gets hammered down.'"

Another expatriate with direct work experience on Japanese production sites says: "On one hand you have this new generation of young Japanese employees who are eager to work in a global corporation, who want to get the benefit from a global style and thinking, but are scared to death to take charge or make a tough decision because this could upset their elders. Many high-level positions are filled by people who have no clue on how to set a corporate culture; they simply got to that level due to their seniority and "good behavior" for years with the same company."

Balancing individualism and collectivism

Another contradictory element of the puzzle, that highlights the inner-organizational west-east conflicts and draws together conflicting generations, is the pervasive value of collectivism. Beginning in the 1970s, together with the industrialization, the Japanese society started shifting slowly towards more individualistic values. However, this does not necessarily mean that the individual performance-based practices will automatically work in this multi-layer society. Experience of MNCs shows that individual decision-making, merit-based rewards and strong individual responsibility are still seen as a dare to most of the Japanese employees. The deeply rooted collectivist culture that offers the comfort of group-support, group-decisions and subsequently group-responsibility still appears to be quite influential.

One Japanese employee of an MNC expresses his perception of his Western colleagues: "There is a lack of interpersonal relationships. After work people just go home, they do not help each other much. There is a strong division between private and work life. At the same time it would be good for us to discuss some of the work issues at dinner."

Another one says: "People do not support each other. They are very individual, mind their own business, not others. Foreigners are very result-driven".

Indeed, most of the multinational firms do try to abandon the "excessive collectivist" practices, such as regular group meetings, group discussions, team events, and well-known after work "nomikai" parties, as they are considered to be time-consuming, expensive and inefficient. At the same time, the lack of these very practices causes a high degree of dissatisfaction and insecurity among the Japanese employees who find comfort in the information-sharing and the relationship-building activities.

Finding the middle path

It is a challenge to succeed and find the sensitive balance in the complex two-pole organizational and national environment of Japan.

As a foreign manager puts it: "How do you change a culture of perception vs. reality? I think we are a 100 years away from Japanese (employees – remark of the author) accepting this (modern Western – remark of the author) philosophy. Or at least another 30 years… to get the new generation of thinkers in hot seats. Even this will require a lot of coaching and expatriate presence in global companies operating in Japan."

At the same time, it is comforting and encouraging to hear a young Japanese professional say: "My mind changed totally. If I have to change my job, I would prefer a foreign company."

There are stories of success, and a number of international firms have found long-run solutions and achieved favorable outcomes. Such stories could be of great help for both foreign firms planning to enter the Japanese market and those who have already established businesses in Japan.

One of the crucial steps of those who succeeded in the challenging Japanese environment was to create or often improve the company image, showing commitment to the country and its values by means of emphasizing a strong will and intention to build long-lasting relations based on loyalty and respect rather than a short-term profit-oriented approach.

Other efficacious policies have included building a corporate culture that matches the expectations of those employees who choose to work for a foreign organization. This includes importing the headquarter's values and having an extensive group of expatriates on all levels of the organization, making efforts to improve work-life balance and introduce the merit-based promotion system, combined with the team-based reward system, group discussions and extensive trainings favored by many Japanese.

When in Japan, one has to adapt to some of the traditions that are crucial for success in this distinctive culture, including the values of immediate situation awareness, validation of experience, non-judgment, patience, endurance, flexibility and never-ending practice. As a Japanese proverb puts it: "The bamboo that bends is stronger than the oak that resists."

contact

Elena Groznaya is a specialist in intercultural management and cross-cultural communication with global living and work experience. During the last three years she worked as a researcher, educator, coach and corporate trainer in Kobe (Japan), primarily specializing on the analysis of Japanese business culture and organizational cultures of multinational firms in Japan.

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tcworld is hitting the road!

As Europe's largest association for technical communication and information developement, tekom strives to bring together professionals from across borders and enable a fruitful dialogue. To target this objective, the tcworld Roadshow 2013 - a mobile one-day conference - will bring the newest trends and developements to technical writers in six European cities.

By Priyanka Kalvit and Anke Mecklenbrauck

Technical communication has grown far beyond the scopes of a mere writing and editing profession. Due to globalization it has become a business asset and a true success factor for many European companies. However, in order to generate the maximum value from technical communication, legal requirements, technical challenges, educational standards as well as the diverse needs of global audiences will have to be met. Thus said, technical communication creates a very challenging, yet profitable business environment.

In order to discuss how technical content can be turned into a major asset for companies, tcworld has organized a mobile one-day conference that offers an exciting program including presentations from local and international experts. During a panel discussion top industry experts will illustrate how to manage successful teams. The conference program will be completed by an interactive session to encourage the exchange of ideas and experiences among the participants. The tcworld Roadshow will be held in six European cities within the first two weeks of June. It is the ideal opportunity for all those who are looking for new ideas on how to create value from technical content or who are eager to start a European network of technical communication experts.

We are pleased to let you know that Adobe supports the tcworld roadshow 2013 as a Platinum sponsor. We also receive great support for this event from the Finnish association STVY and the Swedish association FTI as well as from our Country Groups tekom Belgium, tekom France and tekom Danmark. Our regional co-sponsors are currently Euroscript, World Translation and Etteplan|Tedopres.

If you are interested in contributing or presenting at the tcworld Roadshow 2013 or if you would like to know more about the event, please contact Ms. Anke Mecklenbrauck at a.mecklenbrauck@tekom.de.

The conference program as well as the registration details will be available soon. You can always find the latest information regarding the tcworld Roadshow on our website conferences.tekom.de/tcworld-roadshow-2013/

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What delights purchasers of translation services...

Image: © dmytro121287/ 123rf.com

By Daniela Straub

Technical documentation and translation – these two diverse activity areas are closely interlinked with each other in the majority of organizations. According to tekom industry figures dating from 2012, 83% of companies had to prepare translations. Around 47% had to translate their technical documentation into more than ten languages. This raises questions about costs and the quality of translation that organizations expect from translation service providers. To shed light on these issues tekom, in the summer of 2012, conducted the study "Purchasing translation services". In addition, a tekom guideline for purchasing translation services was created in cooperation with Prof. Dr. Klaus Dirk Schmitz, Ilona Wallberg and Benedikt Kraus.

The study analyses the question: What does quality of translation services mean from a customer perspective? Altogether 222 respondents participated in the survey, 88% of which were executives. All the respondents were responsible for technical documentation departments and were also purchasers of translation services.

Quality, as defined from a customer's perspective, is present, when the customer's requirements are fulfilled. By this definition, quality is not an abstract term or defined by generally applicable criteria. Quality is defined by the customer and is based on his experiences with respect to the translation or the service, which he compares with his requirements. Thus, from the perspective of the translation service provider, quality means delivering what the customer demands – and these requirements change constantly. Thus, fulfilling quality requirements is a continuously changing target in a competitive market. Translation service providers must know the current requirements of the customer and implement them to satisfy the customer.

Expected, normal and delightful requirements

The survey used the KANO model for customer satisfaction originating from marketing to define customer requirements and their importance. The basic thought behind the KANO model is to create categories of requirements that lead to different degrees of customer satisfaction. Thus, the KANO model differentiates between expected requirements, normal requirements and delightful requirements.

Expected requirements are all those services that the customer assumes as given – usually implicitly. They are regarded as self-evident and therefore are not demanded explicitly. They only have consequences and lead to dissatisfaction when they are not fulfilled. Conversely, the customer does not pay for such requirements if the expectations related to them are overachieved. Although their fulfilment by the translation service provider avoids dissatisfaction, customers do not consider them a deciding factor.

On the other hand, customers explicitly demand normal requirements. These are the obligatory and measurable service components that are usually explicitly formulated in bids. The customer can compare these directly with offers from competitors. The customer is dissatisfied if normal requirements are not fulfilled as expected. However, just meeting expectations leads only to moderate satisfaction. The services provided by the translation service provider are still perceived to be replaceable. In contrast, if the expectations are overachieved, customer satisfaction increases. Therefore, if a translation service provider exceeds the normal requirements, he can improve customer satisfaction and thus customer retention.

Delightful requirements are services or attributes of translation that enthuse the customer. The customer does not expect them, but if they are fulfilled it greatly increases the value of the translation or the service provided. They are a crucial qualitative advantage for the customer. The translation service provider can enhance his position vis-à-vis his com-

petitors by fulfilling delightful requirements. If delightful requirements are not fulfilled, this does not lead to customer dissatisfaction, but the translation service provider loses the chance of a significant competitive advantage. While, in case of normal requirements, customer satisfaction is just proportional to the degree of fulfilment, the fulfilment or the overachievement of delightful expectations increases customer satisfaction progressively.

Applying the model to tc and translation

If the KANO model is applied to technical documentation, we could postulate that the expected requirement of the end-user is to receive the respective product information along with his new purchase. If this is missing it will cause dissatisfaction. From a customer perspective, a normal requirement could be that with the help of the technical documentation a problem can be solved quickly. Finally, the customer could be delighted if he receives the technical documentation in different media – then the customer is more than satisfied. However, these are untested assumptions.

The requirement categories, which purchasers of translation services and managers use for different quality criteria and services, were determined empirically for translation services through the study. The criteria for the survey were taken from the list of "Structured Specifications and Translation Parameters (version 6.0)" by Alan Melby as well as the DIN EN 15038 "Übersetzungsdienstleistungen – Dienstleistungsanforderungen" [Translation services – Service requirements].

The findings

As expected, the results show that diverse customers evaluate and classify the individual criteria differently. Something that is a delightful attribute for one customer is evaluated as a necessary normal attribute by other customers. This does not only show that customer requirements and expectations vary, but also highlights the dynamics and alterability of the requirements. Something that is delightful in a product or service today could already be taken for granted tomorrow.

If the assignment of the criterion is evaluated according to which requirement category it was assigned to by a majority of the respondents respectively (the statistical model value), the following picture emerges.

Normal requirements include:

- Self-check by the translator
- Final formatting
- Localization of units
- Complying with a style guide
- Correct word structure
- Review: Reconciling the content of target-source text
- Style: language level of native speaker
- Domain expertise of the translator
- Use of domain language/ domain terminology

The following attributes lie at the transition from **normal requirement to delightful requirement:**

- 100% orthographic accuracy
- 100% grammatical accuracy
- Translation by a certified translator who is a native speaker

The clear delightful requirements include:

- Review by a domain expert
- Final proofreading by a native speaker

But, what is the role of quality from a customer viewpoint as compared to the costs incurred for translation? When asked what was the deciding factor when awarding translation services – minimizing costs or maximizing quality – only 20% of respondents stated the goal to be minimizing costs. For the clear majority of 80%, the objective when awarding translation services was maximizing quality. None of the respondents was ready to consider a corresponding reduction in translation quality in return for very low costs. The majority (57%) preferred an average translation quality at average costs. And 43% were also ready to bear higher costs for high-quality translations.
Thus we can conclude that quality plays a key role in the purchase of translation services.

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Dr. Daniela Straub graduated in Psychology and has been working for tekom consultancy projects since 2003. For tekom she conducts empirical studies in the field of tc. She organizes and leads the tekom benchmarking workshops for the heads of tc departments. She is also involved in the development of the tekom further education guideline and certification system for technical writers and is in charge of TCTrainNet.

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when	what	where
April 10 – 12	**Localization World Singapore** www.localizationworld.com	Singapore
April 18 – 19	**TMS Inspiration Days** www.inspirationdays.eu	Cracow, Poland
May 2 – 4	**ELIA Networking Days** www.elia-association.org	Munich, Germany
June 3	tcworld ROADSHOW EUROPE 2013 **Helsinki**	Helsinki, Finland
June 5	**Stockholm**	Stockholm, Sweden
June 7	**Copenhagen**	Copenhagen, Denmark
June 10	conferences.tekom.de/tcworld-roadshow-2013 **Eindhoven**	Eindhoven, The Netherlands
June 12	**Antwerp**	Antwerp, Belgium
June 14	**Paris**	Paris, France
June 12 – 14	**Localization World London** www.localizationworld.com	London, United Kingdom
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