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Client Questionnaire

General Project Issues

1. What objective(s) do you want to achieve with this release of the product?

2. What percent of the software/project is complete?

3. Do you anticipate major functionality changes to current functionality based on testing?

    Yes   No

    If yes, can you provide an estimate (percentage) as to the changed functionality, the new functionality, or both?

    Can you provide a brief description of the changed or new functionality?

4. What level of involvement is mine to be in the project – researching, writing, editing, designing, graphics, processes and procedures, styles and standards, and so on?

5. Is there any existing documentation for this project?   Yes   No

    If yes, what kind – guides, OLH, marketing, white papers, technical papers, vendor papers, and so on?

6. Do you have, or know of similar existing documentation for a similar product?   Yes   No

7. What other type of information is/will be available for me – website, internal/external training, and so on?

8. What is the lifecycle for this product – releases, updates, patches, and so on?

9. Do all customers upgrade at relatively the same time, or if not, how "far back" in old versions do you provide support?

10. What platforms does the product operate on?

    What databases does it use?

11. If only one now, do you see multiple platforms and/or databases in its future?   Yes   No

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12. What are the biggest milestones do you see to completing this product on time?

13. Is the product name stable or do you anticipate a change?

Documentation Issues

1. What is the general purpose of the document(s) for the project – Training, Quick Reference, Frequent Reference, Procedural, Installation, Configuration, Development, Regulatory, Administration, or some combination of these?

2. In what format(s) are you expecting the documentation to be delivered – hard copy, soft copy (online), OLH, website, and so on?

3. Do you need training materials developed/single-sourced from the user documentation?

    Yes   No   If so, when?   at the same time   at a later date

4. Do you have a preference to the following:

    Publishers/processors –   Word   FrameMaker   No preference
        Other:
    HAT –   WWP   RoboHelp   Doc-to-Help   No preference
        Other:
    Graphics tools –   SnagIt   Hypersnap   Photoshop   No preference
        Other:

5. What aspects of documentation that you have seen or used do you particularly like?

    What aspects do you not like?

6. Do you currently have company styles and standards, templates style sheets, company colors, company taglines/logos and so on that you want used for this project?

7. Do you have any elements that you expect to always see in certain documents? (Some of these are standard while others are at the client's discretion.)

Title Page	Table of Contents	Quick Reference Index
Approval/Sign-Off Page	List of Figures	Index
Revision History	List of Tables	Reader Feedback Sheet
Preface	Glossary	
Other:		

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Audience

1. What is the technical level/background of your users?

2. What is your users' primary language? :

   Will the documentation need to be localized and/or translated?   Yes   No

3. What is the level of familiarity with computers?

4. Have your users used similar products?   Yes   No

   If so, please identify.

5. Why are they using your product?

6. How often do they use your product?

7. At what organizational level are your users (clerical, engineers, data entry, CSRs, management, and so on)?

8. In what kind of environment will the documentation be used – field, at the desk, in the office, on an assembly line, and so on?

9. What questions does your help desk/training staff frequently receive from users?

10. What is the most common compliment about your product?

   Conversely, what is the most common complaint?

Technical Direction Assistance

1. Who are the Subject Matter Experts (SMEs) for the project and what are their positions/roles for the project?

2. Is there a set standard procedure for acquiring answers/getting technical feedback from SMEs?

   Yes   No

   If not, what does each individual SME prefer? (A list of names, titles, addresses, emails, phone numbers, and standard working hours of each SME must be provided prior to starting the project).

3. What is the development/project team's view of documentation?

   Do they feel that it is a necessary evil or that it is vital to support of the product?

4. Do your SMEs know the difference between a technical edit and a copy edit?

Review Process

1. What is your standard review process? (In your response, please address review times and turnaround times.)

2. What is the approval process for the documentation? (Developers must be aware that they must schedule review time.)

3. Who has the final sign-off on documentation?

4. Is there a potential for the product or process that is documented to cause harm or injury (including permanent disability or death) to the end-user?   Yes   No

   If so, will a legal representative review the document(s)?   Yes   No

5. How do you want user testing performed – set procedures, random use, or a combination of both?

6. Where can user testing be held and will I have the ability to change data in it? (If a sandbox environment can be created and is maintainable by the writer, that would be the optimum situation.)

7. Can user testing be arranged to ensure the document(s)' usability, readability, clarity, and so on?

8. How will user testing affect documentation schedule – add to the schedule, delay the schedule, no change to the schedule, and so on?

9. Who will arrange and coordinate the user testing?

Scheduling

1. Based on previous project experience, what is your feel for the time that you want to allot to write the document(s)?

2. When you want final documentation to be complete (For example, one week after project completion, upon delivery of project, after installation and testing at a client site, and so on)?

3. Do you expect the documentation to go through the same phases as the SDLC – planning, testing, and so on? (If your organization does not have a formal SDLC, how do you expect the documentation to be timed/scheduled?)

4. What is your procedure for handling deadline slips? How can we ensure that that I am advised of such situations?

5. How do you wish to handle milestones – sample of documentation in progress, simple reporting of percent complete/.outstanding issues, and so on?

6. What is your procedure for handling software/scope changes that impact the project timeline and therefore the documentation?

How can we ensure that I am advised of such situations?

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Miscellaneous

1. Any questions that you may have about my work habits, references, work samples, and so on?

2. Other?