

Communicating technically to the non-technical

by Dave, March 2009

At Newfangled, one of our most important services to our clients is helping them make sense of the web. We've gotten really good at it. Systems such as our grey-screen prototyping process are excellent facilitators at conveying complex technical systems in such a way that audiences of all experience levels can grasp important intricacies. Just as importantly, our passion for what we do gives us the drive and commitment to share this excitement with our clients.

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Knowledge is power!

The first step, of course, is to know what it is you are trying to explain. Understand the principles of the concept you are trying to convey. It helps to break it down into the most basic parts, which makes it easier to contemplate how these aspects interact with a larger system as a whole. If you are unsure as to what you are communicating, stop and figure it out before going any further. It's easy to spot uncertainty. At Newfangled, our project managers go through this process all the time, by conferring with a developer when a new request or question is made. This could be a 2 minute conversation, or an hour-long planning session. It is only at the point that the project manager has enough understanding to then themselves break down a concept into relative and practical terms.

Break it down!

Now the role of educator begins. It's usually a good idea to start by examining how the concept relates to what the audience already understands - in our case, that would be how their site works, or in the case of a pending project, how they expect it will work. As Sarah, one of our project manager assistants, says, "start from the client's perspective and not complicate things by giving them more than they need." Using your understanding of the question or request, identify the initial pieces of information that they will need to begin to form a mental relationship of what will be going on, and how that may impact other parts of the site. There is a lot of detail that the audience doesn't need to understand or even hear. If they do, it will be a lot easier for them to fully appreciate it once they have the framework clearly defined.

What constitutes the important information? For Brian, another project manager assistant, it would be:

- What this new feature will mean to them
- Why it is worth as much as it is
- How it will affect their clients
- How it will affect them
- What this upgrade solves

Similarly, Sarah would identify the important aspects as "what they are going to see/experience, and what they need to do, or do differently. Usually only include information about how things actually work that seems directly necessary for supporting one of those more practical concerns."

The common thread here is that these are all questions that our audience should be able to immediately respond to. This enables them to be active participants in the discussion, allowing them to answer the questions that they know best, in an informed and helpful way.

Be flexible

Perhaps the most important part of this communication process, however, is your ability to adapt to each audience's particular needs. Brian suggests that, with a more non-technical audience, adapt the discussion to identify parallels between the technical concept and the real-world problem it relates to or is trying to solve. For Sarah, facilitating a conversation in which the audience is comfortable enough and understands enough to ask questions is key. Both are good points, and illustrate the same principle - always make sure the context of the topic being discussed is clear, before going any further. If you sense the audience isn't following, try another approach.

Take it Away

While the importance of conveying technical information to the audience is understood, we've found that another, more subtle issue arises. Often the audience, in our case the client or agency partner, must become the expert as soon as the meeting or phone call ends. Perhaps they have to explain the new feature to their boss, who may have less technical knowledge than they do. Or perhaps they need to then train someone else how this feature will impact a system that many people have grown used to. In all these cases, it is important that the audience not only follow along and participate in the discussion, but understand it well enough that they themselves can break it down for their audience. If we can facilitate that, we know that there is a much better chance of the best decisions ultimately being made, and the end result of a website that meets our and our client's expectations is achieved.

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