



INFORMATION MAPPING

THE INFORMATION MAPPING METHOD

Before and After Examples

Presented by

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- **consulting**, in which we assess, recommend, and implement a variety of communications strategies for your organization, and
- **training programs**, in which we help your people develop the specific Mapping skills your organization requires to meet its needs.

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Information Mapping

Before & After Examples

Overview

This document demonstrates how the Information Mapping method can be applied to a wide variety of documents in a variety of media.

It provides examples that are written in conventional form (“Before”) and then is Information Mapped (“After”). These Before and After examples demonstrate how the method can be

- applied to various document types, and
 - used to convey each document type’s particular kind of communication.
-

Important warning!

Don’t mistake the format for the method!

What you can see...

What you can see is the *format* – how the information appears on the page. While it is tempting to imitate the format, there is more to Information Mapping than meets the eye. The format is just the finished product, the “tip of the iceberg”.

What you can’t see...

What you can’t see is the *method* used to create this format –

- the analysis
- organization, and
- appropriate use of presentation modes.

Without this method, the format *cannot* be effective. Indeed, cannot even be created.

In this document

These document types and examples are included:

| Document Types and Examples | See Page |
|--|-----------------|
| Before and After Example of a Memo | 3 |
| Before and After Example of a Email | 5 |
| Before and After Example of a Procedure | 7 |
| Before and After Example of a Policy | 9 |
| Before and After Example of a Process | 11 |
| The Mapped Process Converted to a Web Page | 13 |

Continued on next page

Before & After Example of a Memo

Before example

A Conventional Version of a Memo

TO: All Supervisors
FROM: Director of Human Resources
SUBJECT: TRANSFERS

Vague title fails to give a clear indication of what this document is about.

There are more and more requests for transfers as the company and key work-force adopts a more flexible lifestyle. The company supervisor is a key person in facilitating such transfers and in determining whether they would be in the best interest of the company and the employees. This memorandum covers company policy which has been in effect for the past year and continues to be our policy. It outlines each supervisor's responsibilities when an employee requests a transfer.

First, it is in the company's interest to retain employees who are performing satisfactorily therefore, we will try to help employees to move to an area or job which they find more desirable. This is what you should do. When an employee comes to talk about or request a transfer, you should provide them with Form 742, Application for Transfer, and request that they fill it out as soon as possible.

If the employee is applying for a new job and not just a new location, and if there are any parts of the new job that you think may disqualify the employee, then you should discuss those areas with the employee immediately. Remember, it is company policy that if an employee wants a transfer, the company will make every effort to find an acceptable job. So, you should not discourage any request, even if it would disturb the completion of projects or goals in your department.

At the bottom of the form, fill out the supervisor's comment. Be brief and to the point. When you finish that, make a copy of the employee's most recent performance review and attach it to the form.

If the employee's current performance is unsatisfactory, then your signature and your immediate supervisor's signature are required on Part C of the form. If the current performance is outstanding, attach a copy of any letters of commendation. If the current performance is unsatisfactory, you don't have to attach anything.

Send (a copy of) the blue copy of the form to the company Placement Bureau and a pink copy to your Departmental File. The yellow copy should be given to the employee.

The whole document is a "wall of words" that forces the reader to *read* it just to find out what it's about.

All text is given equal weight, preventing different readers from quickly finding specific information relevant to them.

Continued on next page

Before & After Example of a Memo, Continued

After example The Information Mapping Version of a Memo

TO: All Supervisors
 FROM: Director of Human Resources
 SUBJECT: How To Handle Transfer Requests

Explicit title tells the reader upfront what this is about.

Introduction There are more and more requests for transfers as the company expands and the key work-force adopts a more flexible lifestyle.

This memo outlines each supervisor's responsibilities when requests a transfer.

Information is broken down into manageable chunks with labels for quick reader access.

Procedure When an employee requests a transfer, follow the steps below

Actions are displayed in a logical, easy-to-follow sequence.

Decisions readers must make are displayed in easy-to-understand tables.

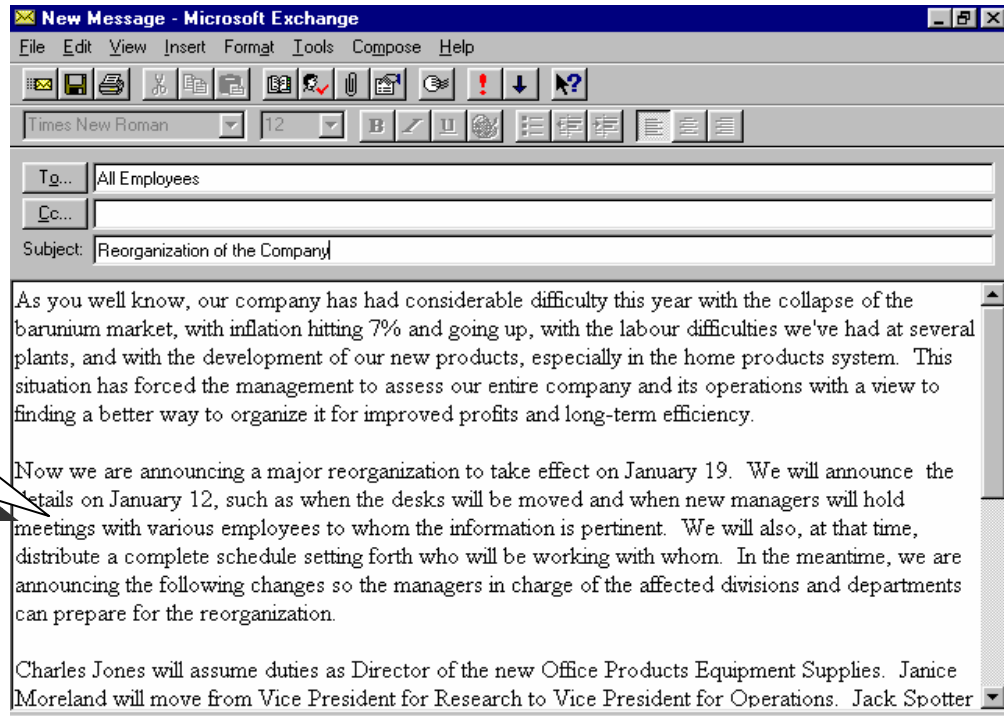
| Step | Action | |
|------|---|---|
| 1 | Provide the employee with Form 742, Application For Transfer. | |
| 2 | Discuss with the employee any areas in the job that you consider may disqualify the employee. Important: Remember that it is company policy to retain any employee whose performance is satisfactory. The company makes every effort to find an acceptable job if an employee wishes to be transferred. You may in <u>no</u> way discourage a request for a transfer. | |
| 3 | Enter your supervisor's comment in the space at the bottom of the form. | |
| 4 | Attach a copy of the latest performance review. | |
| 5 | Use this table to decide which part of the form to sign. | |
| | IF the current performance is... | THEN... |
| | unsatisfactory | add your signature and your immediate supervisor's signature on Part C of the form. |
| | satisfactory | do not add any additional attachments. |
| | outstanding | attach copies of any letters of commendation. |
| 6 | Use this table to decide where to send each copy of the form. | |
| | SEND copy of the form. | TO... |
| | blue copy | Placement Bureau |
| | pink copy | department file |
| | yellow copy | employee |

Before & After Example of an Email

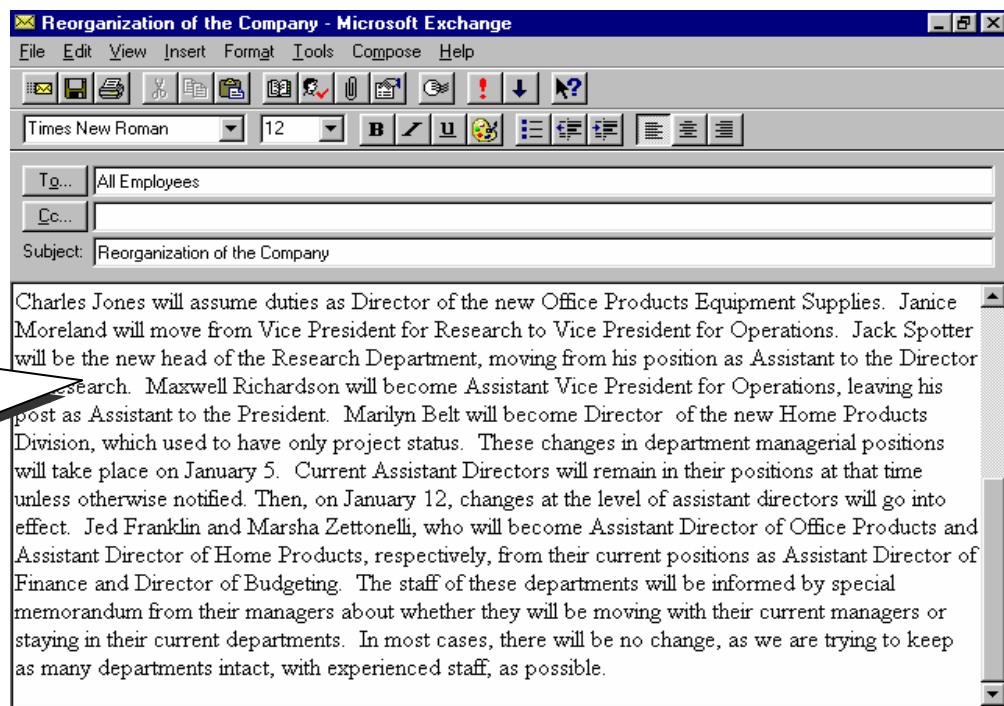
Before
example

A Conventional Version of an Email

Screen 1



Screen 2

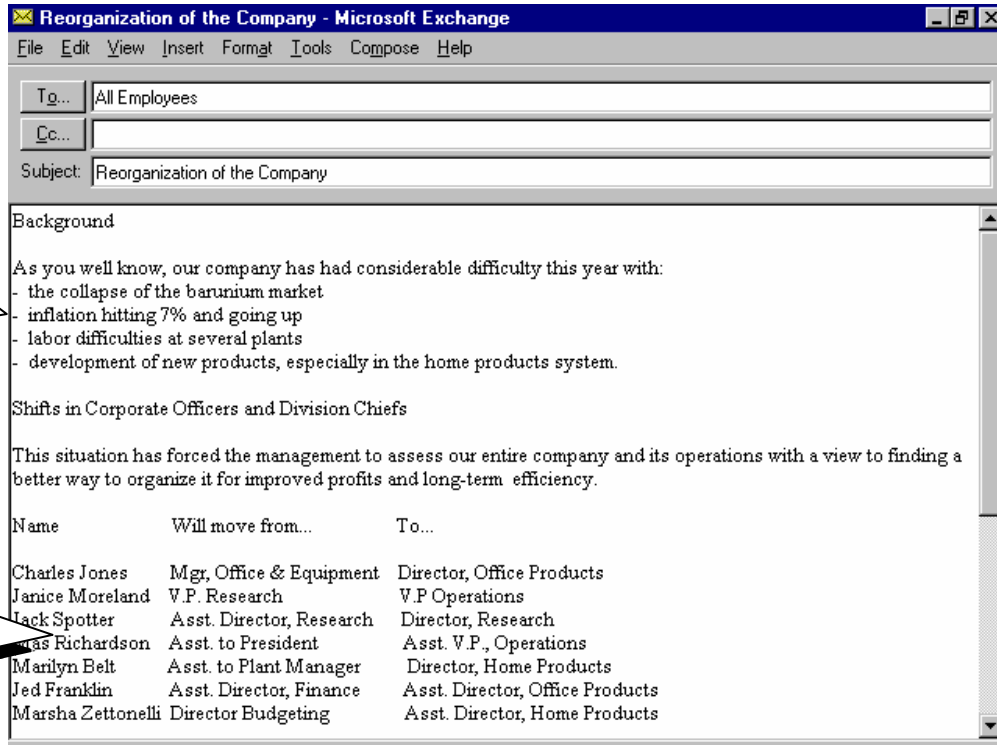


Continued on next page

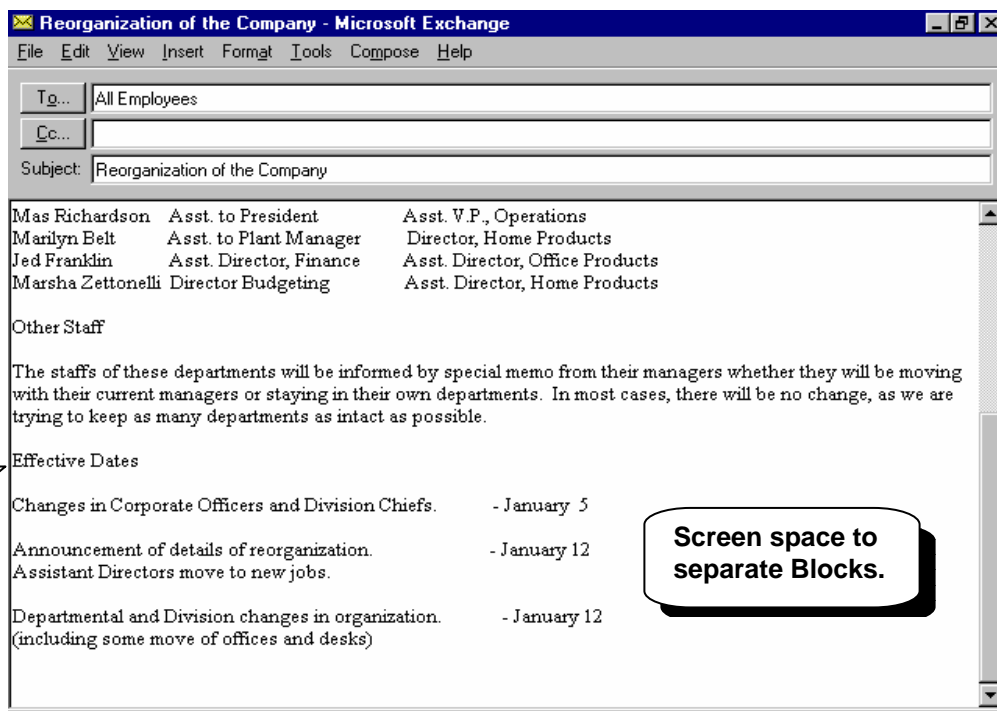
Before & After Example of an Email, Continued

After example The Information Mapping Version of an Email

Screen 1



Screen 2



Continued on next page

Before & After Example of a Procedure

**Before
example**

A Conventional Version of a Procedure

Preparing Your Data For The Audit

One of the more important steps in the audit is to make sure that all the data required for the audit is correct and that you have completed all the auditing steps.

Actions to be followed are blurred by a writing style that does not focus on actions.

1. You should try to obtain the run data from the computer room as well as a sample of the data items selected for the audit from the source document.
2. As an audit “insurance policy”, you should make sure that the information you record is sufficient, or descriptive enough, for easy identification for the next audit or any succeeding audits.
3. Using the worksheets, you should make sure that the information you record is sufficient or descriptive enough for easy identification for the next audit or any succeeding audits.

The minimum information you need for a data item contained in the sample and the minimum information you need to describe the attributes of the sample are the least you should list on the worksheets. Account Name, Account Number, Type of Business would be some examples of minimum information needed for data item information. Sales Territory or Effective Date would be minimum information attribute identification.

Actions are further blurred by mixing them in with non-action items.

4. You should compare the sample data to the programming instructions in effect when the source document was begun.
5. You should compare the sample data to the company requests you find.
6. You should compare the sample data to any statistical guidelines.
7. You should compare the source data that you have recorded on your worksheets to run data printouts you obtained from the computer.
8. Record any errors or differences you found on steps 4 through 7 on a Worksheet.
9. Once you have completed steps one through eight, you should prepare a summary sheet noting all the discrepancies and analyze by data item to compute the accuracy ratios for the audit sample data items.
10. Once you have completed steps one through nine, you should prepare to discuss your findings with company management. You should be very specific both in your discussions and your report to point out the problems and differences. These discussions will help management correct the errors.

Continued on next page

Before & After Example of a Procedure, Continued

After example The Information Mapping Version of a Procedure

How to Prepare Data for an Audit

Introduction

One of the most important procedures in an audit is preparing the data. Careful preparation ensures that the data is correct and that each step has been carried out.

Procedure

Follow the steps below to prepare data for the audit.

Actions are clarified by

- isolating each on in a clear sequence, and
- a writing style focused on action verbs.

Additional, non action items are clearly separated out from the actions.

| Step | Action | | | | | | |
|--------------------------------|---|------------------------------|----------|---------------------------|--|--------------------------------|--|
| 1 | For data items selected for audit, obtain the following <ul style="list-style-type: none"> • source document samples, and • run data from the computer room. | | | | | | |
| 2 | Verify the source documents sample by comparing the samples to the original list. | | | | | | |
| 3 | Record on a worksheet sufficient descriptive information to provide accurate identification for future audits. <table border="1" data-bbox="581 968 1398 1182"> <thead> <tr> <th>Minimum Information Required</th> <th>Examples</th> </tr> </thead> <tbody> <tr> <td>Attributes of the sample.</td> <td> <ul style="list-style-type: none"> • Sales Territory • Effective data </td> </tr> <tr> <td>Description of each data item.</td> <td> <ul style="list-style-type: none"> • Account Name • Account Number • Type of Business </td> </tr> </tbody> </table> | Minimum Information Required | Examples | Attributes of the sample. | <ul style="list-style-type: none"> • Sales Territory • Effective data | Description of each data item. | <ul style="list-style-type: none"> • Account Name • Account Number • Type of Business |
| Minimum Information Required | Examples | | | | | | |
| Attributes of the sample. | <ul style="list-style-type: none"> • Sales Territory • Effective data | | | | | | |
| Description of each data item. | <ul style="list-style-type: none"> • Account Name • Account Number • Type of Business | | | | | | |
| 4 | Compare data samples to related documents and record on the worksheet any source of error or difference. <table border="1" data-bbox="581 1283 1398 1497"> <thead> <tr> <th>Compare...</th> <th>To...</th> </tr> </thead> <tbody> <tr> <td>sample data</td> <td> <ul style="list-style-type: none"> • programming instructions in effect when source document begun, • company requests, and • statistical guidelines. </td> </tr> <tr> <td>source data</td> <td>run data printouts.</td> </tr> </tbody> </table> | Compare... | To... | sample data | <ul style="list-style-type: none"> • programming instructions in effect when source document begun, • company requests, and • statistical guidelines. | source data | run data printouts. |
| Compare... | To... | | | | | | |
| sample data | <ul style="list-style-type: none"> • programming instructions in effect when source document begun, • company requests, and • statistical guidelines. | | | | | | |
| source data | run data printouts. | | | | | | |
| 5 | Prepare a summary sheet that <ul style="list-style-type: none"> • lists each difference or error found, and • analyzes each data item to compute accuracy ratios for the audit sample data items. | | | | | | |

Final step

Prepare to discuss your findings with company management. Be specific in both your report and the discussions.

Note: These discussions are important to

- point out errors and difficulties, and
- provide management with information to correct the errors.

Before & After Example of a Policy

Before Example A Conventional Version of a Policy

Defining Accuracy Ratios

In order to help in comparing the statistics from one audit to the next, the accuracy ratios must be very carefully defined. The following are the definitions that must be present in every audit.

Data Field Verifying Ratio: The number of times a given data field is correct, divided by the total number of instances that the field is audited.

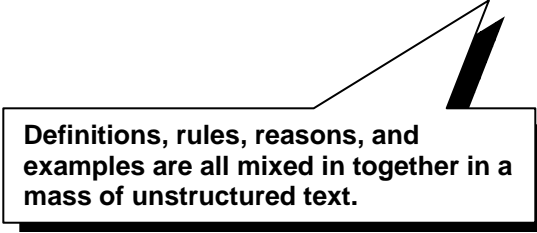
Transaction Accuracy Ratio: The number of times all data fields reviewed on a given transaction are correct, divided by the total number of transactions reviewed.

Account Accuracy Ratio: The number of times all data fields audited are correct on all transactions relative to a single account divided by the total number of accounts reviewed.

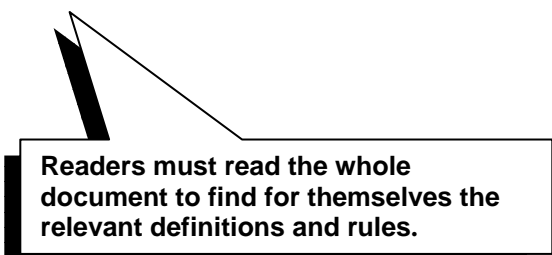
If an audit is comparing transaction accuracy ratios for a specific length of time, then it is important that the definition of the transaction remains the same for all audits going on during the time-frame. For example, if Cash Receivables are audited for one year and international is considered part of that transaction then international must be considered as part of Cash Receivables for any other audit or subsequent audits conducted during that time-frame. The rationale for this is that the accuracy ratios would be lower in the second audit even if the quality of the data remained unchanged.

Also, the accuracy ratios used should clearly state which data fields are being reviewed.

If the company's own wish is to modify or change some of the more important data fields, this wish should also be clearly listed. The modifications or changes would impact the definitions given to the transaction and account accuracy ratios previously described. The more data fields reviewed per transaction, the lower these important ratios are liable to be.



Definitions, rules, reasons, and examples are all mixed in together in a mass of unstructured text.



Readers must read the whole document to find for themselves the relevant definitions and rules.

Continued on next page

Before & After Example of a Policy, Continued

After Example The Information Mapping Version of a Policy

Rules for Defining Audit Accuracy Ratios

Introduction In order to compare the statistics of one audit to the next, the accuracy ratios must be defined and presented consistently.

Terms and definitions Each audit must contain the following ratios.

| Ratio | Definition |
|----------------------------|---|
| Data Field Verifying Ratio | The number of times a given data field is correct, divided by the total number of times the data field is audited. |
| Transaction Accuracy Ratio | The number of times all data fields reviewed on a transaction are correct, divided by the total number of transactions reviewed. |
| Account Accuracy Ratio | The number of times all data fields audited are correct on all transactions relating to a single account, divided by the total number of accounts reviewed. |

Each relevant item of information is chunked and labeled.

Rule 1: state data items In your audit report, you must clearly state in the accuracy ratios which data items are included in the Data Field Verifying Ratio.

Rule 2: note any changes When the company requests changes or additions to the Data Field Verifying Ratio list, you must note these changes in your Audit Report.

Rationale:

- Any changes will affect the results of the transaction and account accuracy ratios. The more data fields reviewed per transaction, the lower the accuracy ratios.
- Comparison of audits would be impossible unless the changes were listed.

Rule 3: use consistent definitions When you are comparing transaction accuracy ratios over a specific time period, you must use the same transaction definition for all audits going on within the time-frame.

Example:

If the Cash Receivable transactions included international receivables as part of the transaction during the first audit, then you must include international receivables in the next audit.

Readers can scan to quickly find items relevant to them.

Before & After Example of a Process

Before Example The “Before” version of the process is likely to cause problems for readers for the reasons identified below.

CLIENT SECURITIES

This document describes how Snowden and Farrell processes client securities.

1. The Branch Office receives the securities from the client (by mail, messenger, in person) or the agent of the client. Securities are logged in, and account, security and certificate information is verified through the Securities Processing System (SPS). This is accomplished by accessing the Dividend/Interest, Reorganization, Security Master, and Name & Address databases.
2. The SPS system generates a receipt for the client. SPS also generates a Branch Office Security Receipt Ticket and a manifest to attach to the securities package, which is shipped by overnight courier to the Securities Processing Department.
 - A different process is used for non-negotiable securities. Offices may not receive securities which cannot be presented for transfer.
 - A Vice President or Manager’s approval is required for receiving non-negotiable securities, requiring additional documentation, and proceeds from these securities may not be disbursed until the documentation is received.
 - See the chapter in this manual about non-negotiable securities for more information.
3. Securities and documents are scanned by an image processor with optical character recognition ability. The department also creates a routing order for forwarding certificates to transfer agents or depositories and records the transaction in the client’s account.
4. Discrepancies in items received and document requirements are communicated to the Branch Office through the SPS.

Callout boxes:

- Title does not reflect the purpose of the information.** (points to the title)
- Multiple process stages mixed together make scanning difficult.** (points to the list items)
- Unclear who is responsible for different process activities.** (points to the list items)

Continued on next page

Before & After Example of a Process, Continued

Mapped
example

The example below is the Mapped version of the same document.

Processing Negotiable Securities

Introduction

This document describes what happens when a client sends negotiable securities to Snowden and Farrell Brokerage for processing.

Non-negotiable securities

This process applies only to negotiable securities.

Reference: Refer to Chapter 7 for information on what happens when a client sends non-negotiable securities for processing.

Process

The table below describes the six stages of the process.

| Stage | Responsibility | Description |
|-------|----------------------------------|---|
| 1 | Client or Client's Agent | Sends securities and supporting documentation to the Branch Office via <ul style="list-style-type: none"> • mail • messenger, or • in-person delivery. |
| 2 | Branch Office | Receives securities and supporting documentation and enters information into the Securities Processing System. |
| 3 | Securities Processing System | Uses the Dividend/Interest, Reorganization, Security, and Name and Address databases to verify <ul style="list-style-type: none"> • account • type of security, and • certificate information. |
| 4 | Securities Processing System | Generates a <ul style="list-style-type: none"> • receipt for the client • Branch Office Security Receipt Ticket, and • manifest to attach to the securities package. |
| 5 | Branch Office | Ships the securities package with attached manifest via overnight courier to the Securities Processing Department. |
| 6 | Securities Processing Department | Receives securities and documents by <ul style="list-style-type: none"> • scanning in securities and documents by image processor • creating a routing order to transfer agents or depositories, and • recording the transaction in the client account. <p>Note: The Securities Processing System Security immediately communicates security or documentation discrepancies to the Branch Office.</p> |

Content is chunked and labeled with meaningful titles.

Exceptions to the process are clearly identified.

Process stages are separated and easy to follow.

Table and bullets result in easier scanning.

Responsible parties are clearly identified.

The Mapped Process Converted to a Web Page

Introduction

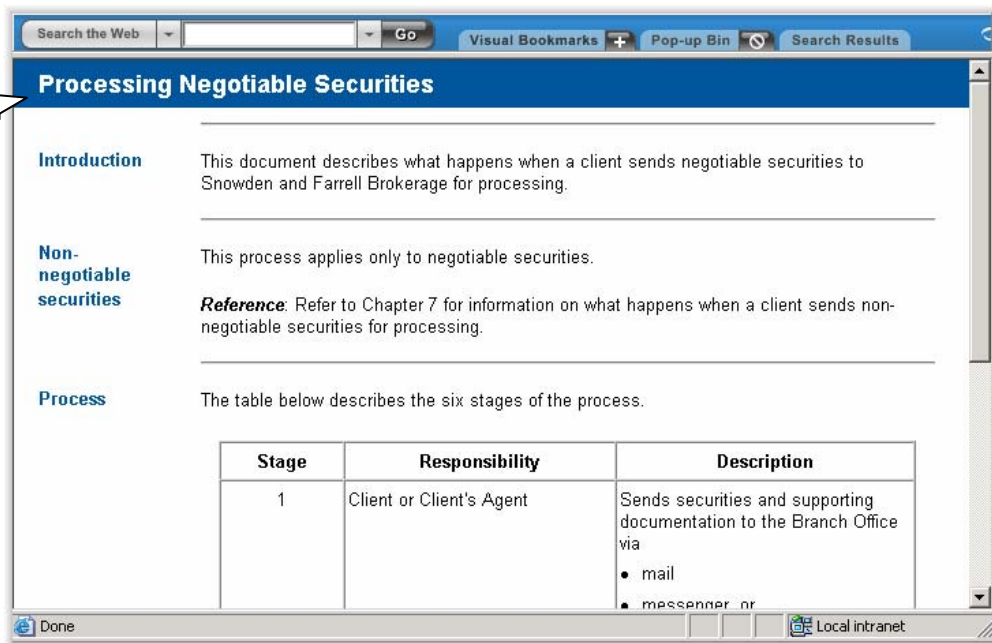
Converting a Mapped document to a Web page is easy with the Formatting Solutions™ software tool. It provides a variety of style sheets for changing the appearance of the Web page without affecting the format of your original Word document.

Example 1

The example below was converted with a style sheet that

- highlights the page title with a colored bar, and
- changes the font from Times New Roman to Arial.

Titles and labels are highlighted with colour.



Continued on next page

The Mapped Process Converted to a Web Page, Continued

Example 2

The example below was created with a style sheet that places the labels for the chunks above the text instead of to the side.

Labels are above text instead of to the side.

Processing Negotiable Securities

Introduction

This document describes what happens when a client sends negotiable securities to Snowden and Farrell Brokerage for processing.

Non-negotiable securities

This process applies only to negotiable securities.

Reference: Refer to Chapter 7 for information on what happens when a client sends non-negotiable securities for processing.

Process

The table below describes the six stages of the process.

| Stage | Responsibility | Description |
|-------|--------------------------|---|
| 1 | Client or Client's Agent | Sends securities and supporting documentation to the Branch Office via <ul style="list-style-type: none">• mail• messenger, or• in-person delivery. |

Example 3

The example below was created with a style sheet that generates anchor links at the top of the page that take the reader directly to the labeled chunks.

Links to the content are generated automatically.

Processing Negotiable Securities

[Introduction](#) | [Non-Negotiable Securities](#) | [Process](#)

This document describes what happens when a client sends negotiable securities to Snowden and Farrell Brokerage for processing.

This process applies only to negotiable securities.

Reference: Refer to Chapter 7 for information on what happens when a client sends non-negotiable securities for processing.

Process

The table below describes the six stages of the process.

| Stage | Responsibility | Description |
|-------|--------------------------|---|
| 1 | Client or Client's Agent | Sends securities and supporting documentation to the Branch Office via <ul style="list-style-type: none">• mail• messenger, or• in-person delivery. |