

## CASE STUDY

## PROFILE

# Pension board takes plain-language approach to manual

Manual restructured to accommodate users and reduce costs

**WHEN THE** Ontario Pension Board (OPB) took a serious look at its employer manual more than a year ago, it saw room for improvement.

The long paper document was highly technical and complex and had been revised many times. Client surveys and frequent inquiries from employers also proved there was a need for structured information in simple, clear terms.

"This resulted in inconsistent information-sharing and a strain of resources of the OPB," says Lisa Thompson, marketing director at Information Mapping Canada (IMC) in Toronto, which was hired to help the OPB restructure the manual, making it easier to understand, use and access.

## Common problems

The original manual presented information in various formats and voices, which resulted in gaps in information. Too often companies will find key data in their employee documents is more tacit knowledge than explicitly written on the page, says Thompson.

"A lot of the stuff is organically grown through an organization, each individual writes with their own voice. Documents start to become messy, unstructured."

The OPB's information was also very process-related and yet the manual did not present it this way.

"In business, where for the most part emotion is not relevant, it needs to be structured so the user can scan and use the information and doesn't actually have to read it," she says.

## Repairing the damage

IMC and the pension board met regularly over three months to work on the updated versions. The repairs included better accommodation of the

needs of audience, in terms of topic knowledge and terminology. Old wording was also transformed to plain language text and large sections were broken down into bite-sized chunks, with plenty of white space to make it more readable.

## Training is crucial

The OPB also had three days of training by IMC, which teaches clients to incorporate the methodology on their own. Typically this includes instruction on everything from e-mails and memos to larger reports, taking two days, but the OPB took three because of the project's complexity and length, says Thompson. The cost is "paid back well within the first year; often the return on investment is within the first quarter," she says.

## Positive results

Now the OPB has a self-service, online manual that is "searchable, easy to understand and consistent with our decision to switch to plain-language communication," says Peter Shena, vice-president of policy and communications at the OPB in Toronto.

"The employer knows exactly what's needed, the documentation, as opposed to calling us and staff members having to walk them through it. We can process much quicker."

The OPB has seen fewer calls and greater comprehension from users since the manual became available in November 2006, says Thompson, and IMC's clients usually see a 10- to 15-per-cent decrease in reading time, up to a 70-per-cent decrease in calls to supervisors, and a 38-per-cent increase in use of documentation.

The new manual is available at the OPB's site at [www.opb.ca](http://www.opb.ca).

**Bryan Hocking,**  
executive director,  
Association of  
Canadian Pension  
Management



## Diverse past helps with new assignment

**AT A** quick glance, Bryan Hocking's background might not suggest he's an obvious choice for executive director of the Association of Canadian Pension Management (ACPM). (The Toronto-based group advocates policies and activities that promote the growth and health of pensions in Canada and provides professional development, education and networking opportunities.)

Hocking's career began as partner and general manager at the family business, Pinecrest Lodge in Ontario, and went on to include director at the Eastern Ontario Development Corporation, executive director of Ontario's Progressive Conservative Party and chief executive officer for the Canadian Kennel Club.

But many of the challenges and responsibilities in his new role are ones he has seen before, such as diverse membership, a need for uniformity and government dealings.

"I purposely set out looking for a professional association that was on my radar and seemed to suit my background, my skills and the way I managed and my philosophy," he says. "The ACPM fit that bill."

Hocking joined the association in January 2007. With the retirement of its previous executive director, the 30-year-old group decided to take the time to assess where it had been and where it was going. It hired a consultant to begin strategic planning and Hocking took over to finish the task.

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