idem
translations, inc.

Translating your technical documentation?

Prepare for the risks...and enjoy the ride!

EXECUTIVE BRIEF

Best Practices for Managing
Document Localization Projects

Founded in 1983, Idem Translations, Inc. is a full-service provider of translation and localization services. Idem specializes in certified translations for medical device, biomedical, and pharmaceutical companies, as well as other organizations and entities working in the life sciences sector, such as contract research organizations (CROs), healthcare research centers, and institutional review boards (IRBs). The company is a WBENC-certified woman-owned business and holds certifications to ISO 9001:2008, ISO 13485:2003, and EN 15038:2006

Localization Best Practices
What they are and why we follow them

What are the risks of not following localization best practices?

In the pharmaceutical, medical device, biotech, and other regulated industries, if you do not manage your document localization process well, you open yourself up to significant risks, including mistranslations and production delays, which can lead to:

• Slower time to market (and time to revenue)
• Negative impact on profitability
• Patient harm
• Invalidation of clinical trial data
• Costly litigation

Companies that have built a well-managed document localization process based on the best practices outlined in this executive brief manage these risks for a more seamless system. Their product goes to market on time. Translation costs come in at or under budget. Their documentation supports successful clinical trials. Customers in any country use their product safely and effectively.

What are the recommended best practices?

In this brief, we recommend five best practices whose value lies in their ability to save your organization time and money. They also make it possible to more easily meet your goal—accurate, high quality documentation—and to work effectively with a language service provider (LSP).

> "The benefit of creating and managing a coherent and detailed process during document localization cannot be understated. An intelligent, well-managed process significantly reduces the potential for mistranslation and, of course, the accompanying risks."
>
> *Christopher J. Devine, Ph.D.*
> *Devine Guidance International, Inc.*

Five Best Practices
for Managing Document Localization Projects

Best Practice #1: Optimize your English

Optimizing a document is nothing more mysterious than making certain that it is written clearly and simply in your source language. This is a smart practice that pays substantial dividends, including lower translation costs and more efficient use of your LSP's time. To optimize a document, follow these guidelines:

- Strip your document of excess verbiage.
- Never sacrifice clarity.
- Avoid idiomatic expressions as these rarely translate well into another language.
- Use the active voice.
- Replace text with illustrations wherever possible to improve understandability and reduce the number of words that need translation.
- Curb your creativity. Your LSP will recycle earlier versions of content to offer consistency and cost savings, so write consistently and re-use content when it makes sense to do so.

> "To optimize a document, trim all the 'fat' you can, without sacrificing clarity or readability. Unnecessary words increase expense, because the cost of translation is based on the number of words that are translated. You definitely want to cut words when you can. Always write with localization in mind and choose an LSP that knows the language of your industry."
>
> *Louis Nickens*
> *Senior Technical Writer, Lumenis Ltd.*

> "It's important to focus on making sure a document is accurate in its instructions and statement of a product's intended purpose. Once you get that locked down, you go a long way toward avoiding translation problems. There's nothing worse than translating a document that isn't final and then having to deal with the impact of changes. Follow the proper sequence. You save yourself a lot of stops and starts,frustration – and money."
>
> *Rich Malwitz*
> *Sr. Director of Program Management*
> *Solta Medical, Inc.*

Best Practice #2: Don't Write and Translate Concurrently

In order to accelerate production, some organizations attempt to create a document in their source language and translate it at the same time. Typically, pieces such as user manuals and protocol guides must go through numerous iterations before content is finalized. It is important to realize that creation and translation should be separate processes: trying to do them concurrently results in version control challenges, increased rework, more rounds of review, and increased risk of error. Finalize your source content and then call your LSP. Although the occasional last minute revision may be unavoidable, your localization process with be significantly smoother if you minimize source language changes once translation has begun.

Best Practice #3: Use Consistent Guidelines

A company or product style guide is invaluable in helping to create easy-to-read documentation. Down the road, your use of this guide will give your LSP the tools for success, because it provides a source document that uses your terminology correctly and that has been created according to consistent guidelines. It ultimately saves you time and money.

A company or product style guide typically includes these elements:

- A do-not-translate (DNT) list of words and terms
- A chart of symbols to be used with sample layout and handling instructions
- Font and layout preferences
- Descriptions for client-specific terms that are not in common use within the industry
- Instructions for units of measurement, such as imperial or metric
- Preferred source terms (critical for consistency within your documentation when multiple terms may be used within your company)

> "A style guide is absolutely essential. The sooner you create one the better. With this guide, the whole translation process will ultimately go faster and more smoothly. You'll field fewer of those 'What do they mean by that?' questions from the translator, and the translator won't have to stop to do research, which can slow progress significantly."
>
> *Julia Brown*
> *Technical Writer, Cutera, Inc*

Product Specific	Any specific rules pertaining to how the product name should appear?
Trademarks & Copyrights	Which terms should have ™ and © symbols? When localized equivalents exist (e.g., French ^{MC} and ^{MD}), should these be used?
Units of Measure	Metric or imperial? If both, convention for parentheses? If converting, how many decimal places?
Dates	Which format (US, Europe, Asia)? Two digit or four digit years?
Acronyms	How should acronyms be handled: Translate all, none, or first? Maintain usage of acronym after first instance? Parenthetical on first instance?
English References	If English to be referenced in the translation, should either English or translation be in parentheses? Curved or square?
Tele/Fax Numbers	Format xxx-xxx-xxxx or (xxx) xxx-xxxx or other? International numbers: +1?
Capitalization	Are there any references that would require or benefit from consistent capitalization? What convention should be used if the source is in ALL CAPS?
Do Not Translate	List of DNT terms (can also be integrated into the client glossary).

Best Practice #4:
Provide your Language Service Provider with a context for localization

Appropriate context is critical if a product has new features or functionality. In knowing what to provide, it is helpful to consider context on two levels. First, a translator must clearly understand what the product does and the technology involved. Second, translation should take into account the interaction among marketing materials (such as brochures and datasheets), earlier versions of documentation, software, instructional videos, and the user's reality. Your LSP should be a full partner in the process of delivering an accurate end product. In offering context, you are supplying all the information required to do the job correctly—just as you do for the technical writer who is creating the source document. In essence, your LSP is a technical writer who simply works in other languages.

> "We describe the product in detail and walk our LSP through an in-person demonstration of a feature or option and how it benefits those who will be performing treatments. We have worked with our LSP during each iteration of a product. A huge benefit for us is that they build a body of knowledge over time and can even give us input on the subtleties of changes to a product."
>
> *Rich Malwitz*
> *Sr. Director of Program Management*
> *Solta Medical, Inc.*

Best Practice #5: Use the right tools for the job

The right tools are software applications specifically designed for creating and formatting long and complex documents. They are not usually the word processing programs in common business use. These tools increase production speed and, thanks to stronger formatting features and better file stability, facilitate clean, consistent results across multiple projects. Because less-than-optimal solutions can cause delays and even loss of information, ask your LSP for recommendations to upgrade your tools to the most effective options available. In exploring a possible change, be aware that overcoming your concerns around learning new software will pay off over the long term in increased speed and efficiency.

> "In my daily work, I create documents with industry-standard software. Idem Translations, our LSP, also uses the same version of that software, plus a well-known and accepted translation solution. This makes the entire localization process easier, more efficient, and less expensive. I think it's vital for an LSP to use the same tools that their clients do. "
>
> *Julia Brown, Technical Writer*
> *Cutera, Inc.*
> *.*

Get Help

For more information about how we can take the risk out of translations for you and your team, please visit us online:

WEBSITE
www.idemtranslations.com

TWITTER
twitter.com/IdemTransInc

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