

Chapter 4. Kate Agena

Dr. Kate Agena: Two Decades of Leadership & Innovation

An accomplished writer, holding a Ph.D., and boasting a rich tapestry of professional experiences spanning two decades, Kate Agena embarked on a remarkable journey through the realms of technical communication and information architecture. Her career's evolution reflects a commitment to craft and a dynamic response to the shifting landscape of written communication into new media.

Kate's journey began as a technical writer within a multinational usability laboratory, a role that demanded precision, clarity, and an acute understanding of complex technologies. Her ability to distill intricate information into comprehensible language served as the foundation for her distinguished career. Subsequently, she worked with independent contracts, where her expertise crafting technical content found a niche across organizations. This period allowed her to hone her skills, adapt to various writing styles, and embrace the challenges of different clients and projects. And to explore the promises and perils of artificial intelligence.

Her journey led to a prestigious position within a prominent international security software corporation. Here, her role transformed into a dynamic balancing act, as she was entrusted with harmonizing algorithmically-generated text with human-authored content. Her responsibilities span a spectrum of documentation, from support instructions that guide users through sophisticated software, to in-house technical materials that empower internal teams, to the persuasive delicacy of marketing writing that communicates the value and capabilities of their products. Throughout her career, she has borne witness to the evolving nature of her field. What began as "technical writer" has metamorphosed into "document specialist," "usability engineer," and "experience architect." Her adaptability and foresight have enabled her to embrace each evolution and remain at the forefront of this dynamic discipline. Her capacity to anticipate "whatever is next" and adapt to it is a testament to her enduring relevance and innovation in the field of professional writing.

In summary, this highly qualified and experienced professional traversed a remarkable path from technical writing to an eclectic array of roles spanning information architecture and documentation. Her journey epitomizes the adaptability, versatility, and enduring commitment to crafting impactful, user-centered content that positions Kate Agena to take advantage of opportunities available in the emerging age of artificial intelligence.

Kate Agena Interview Overview

In this interview, Kate Agena, with a Ph.D. in rhetoric and composition with a focus on technical communication, walks through her career journey, touching

on her roles at IBM, McAfee, and her experiences working with AI-driven tools. Known for her clear, logical thinking, Kate reflects on her technical writing background, emphasizing how it has influenced her structured approach to problem-solving and innovation.

The interview begins with a brief introduction to Kate's career start at IBM, where she first worked on product usability and then moved into artificial intelligence (AI). IBM, a pioneer in usability as well as many technology fields, shaped her early professional experience. The hosts note how Otter is using AI to transcribe audio into text—an example of AI's practical applications—which Kate picks up and weaves with her own biography. Kate briefly touches on IBM's role in AI development, providing historical context.

By 3:30, Kate shifts the conversation to her last project at IBM before moving to remote work. She worked on IBM's Internet of Things (IoT) platform, specifically TRIRIGA, which focuses on managing information flows in organizations. Her transition from IBM to Wipro, where she helped drive design thinking and introduced Markdown for documentation, further illustrates her ability to combine technical expertise with design-driven approaches to enhance workflows.

At the seven-minute mark, Kate discusses her transition into content design at McAfee, moving from information development into a more customer-focused role. She highlights how McAfee prioritizes high-quality customer-facing writing and how the company has integrated new AI tools, such as Writer, to streamline content creation. Writer, a tool that uses AI for enhancing written material, has been a key component in improving content across platforms at McAfee.

By the 14-minute mark, Kate addresses the challenges of building trust with an audience skeptical of the promises made regarding AI tools like Writer. She explains how McAfee uses the tool to clean up blog posts, providing consistency sitewide and even utilizing plugins for Chrome, Word, Outlook, Figma, and generative AI. This integration into various platforms shows how AI can streamline processes, but Kate stresses that education and communication are critical in getting people to trust and adopt these technologies in meaningful ways.

At 20 minutes, Kate expands on how McAfee uses AI to educate teams and maintain consistency in messaging. She shares a practical example of using AI to craft mission and vision statements, demonstrating its value in cross-company communication. AI's role in helping companies communicate their core values consistently underscores its potential beyond traditional content creation.

Kate gives a more detailed breakdown of how Writer functions within McAfee's workflows at the 25:00-minute mark. She highlights how Ditto, a plugin in Figma, is used for managing content strings and discusses the security and privacy concerns that arise when integrating AI into organizational systems. Despite these challenges, Kate sees AI as an invaluable tool in improving the overall quality and consistency of company messaging.

By 31:00, the conversation moves toward improving writing prompts, where Kate explains how getting better at generation cues can enhance the effectiveness

of AI tools. She emphasizes the importance of eliminating fear-mongering language and rewriting core statements, which requires skillful use of AI.

Kate introduces Acrolinx at minute 37 of the transcript, which McAfee uses to assign a quality score to content, further refining the feedback loop for writers. This tool enables her team to push back on poorly written content, challenging writers to improve, and ensures a high standard of innovation, choice, and decision-making across the company's written outputs.

At 42 minutes Kate describes the important role of decision-making processes, and considering how to determine whether an AI or any technical trend is worth pursuing. She looks to the future of content design and predicts a deeper integration between content and UX design. As AI advances, Kate sees the potential for more AI-driven roles to enhance creativity and innovation, freeing content designers from repetitive tasks.

At 48:00, Kate reveals the behind-the-scenes efforts to map out content journeys. She touches on service design and how it has informed and impacted her work, helping to articulate problems more clearly and invent creative solutions. She also discusses how marketing and other departments influence content strategies and how neologisms—new terms—emerge from these efforts, reflecting the evolving nature of AI and content design.

The interview concludes at 1 hour and 2 minutes, where Kate shares her vision for the future of content design. She emphasizes the importance of consistent team structures, with dedicated teams for marketing, support, and partners, all working collaboratively. She also highlights how AI, particularly tools like Writer, will continue to remove the drudgery from content creation, allowing designers and writers to focus on more meaningful, high-level work. Finally, Kate explains the nuanced difference between UX and content design, noting that while both are essential, content design plays a unique role in shaping the user experience.

Kate Agena Interview

Michael Salvo 00:14. It's been enlightening to hear what people are doing at their workplaces with AI and how long it has taken them to get to where they are. One of the things that I'm really interested in—and I've told you this—is the progression that you've made from a usability lab at a major international, digital firm and then to a security firm. The last time we spoke, you were talking quite a bit about how AI was helping you generate text, and [how] the people that you were working with were generating text automagically. And that's becoming more widespread.

We [also] want to let you know that we are happy to make you as anonymous [or] as public as you would like. We'll keep in touch with what we are doing. We'll be using Otter.ai to convert the audio into text. We are grateful for your time, and for you talking about your expertise. We respect a great deal of the work that you've done. With that, I'll turn it over to John.

John Sherrill 03:00. I've done a bit of googling about you. Could you tell us a little bit about what you do? What your average day looks like, in relation to your work and how AI fits into that?

Kate Agena 03:22. Right now, like at McAfee ... and not the history so much?

John Sherrill 03:28. I don't know much about your history. So if you can give us an abbreviated version of [it].

Kate Agena 03:34. So I started at IBM in 2005, still doing my dissertation. I worked primarily in, like Db2 kind of stuff ... so it's z/OS, green screen, which obviously [does] not [have] a lot of visuals there [Author note: Kate is describing here database management systems that were transitional between legacy systems and newer systems that emerged in the early 2000s. z/OS was significant in part because it was not a 32-bit system, but a 64-bit operating system which enabled using up to terabytes of RAM]. We were doing documentation and helping some with the words that they put into the interface to make sure that people can navigate when you don't have a GUI [Graphical User Interface].

Initially, I was doing documentation. [At that time,] the interesting thing at IBM was DITA [Darwin Information Typing Architecture]. XML [Extensible Markup Language] had just become an OASIS [Organization for the Advancement of Structured Information Standards] standard that the same group that I was in (at the same lab that I was in) had created. And so, we were doing a big push on the transition to DITA. [Author note: Professional and Technical Writers often use DITA and XML to build modular, topic-based documentation. This form of structured authoring supports consistency, reuse, and efficient publishing across multiple platforms.]

When I started, we were already using DITA, so I never really had to do any of the old stuff. There was a whole year to two years of education on how to do topic-based writing to change everything old into DITA. So that was the main focus at the beginning. Then I spent a year as a project manager for the development team, which was really interesting to see the other side, but words are definitely my thing. So I came back, and I was looking to leave the Bay Area. I was just looking for an opportunity to move internally in IBM to another project that would allow me to go remote. IBM had bought this company called TRIRIGA, which does facilities management, and integrated workspace management solutions, they're called IWMS. When that company came on, I was brought in to help them learn the IBM way. They had two writers and I worked with them, and we eventually built up a bigger team. With that product, we were also doing documentation through Drupal pages and releasing notes in Word: various ways that we were doing writing. That product was more interesting because by then we'd moved from the user technology group that I originally started in, which was basically the writing group, but it was also kind of the only usability-oriented group in IBM very much focused on writing. It was a technical writers' group that went away, and I was then part of Watson Internet of Things (IoT). And so TRIRIGA is considered an IoT product, even though it didn't have a lot of *things*.

But it had the potential to have sensors. For facilities management, you could have sensors around an office that would produce heat maps. For example, now, with a pandemic, when companies are trying to get rid of offices, that data would tell them, “Okay, you can get rid of 50 percent of your office space and have no trouble.” So it was intended to work like that.

We were always concerned about privacy issues on the writing side, and I’m not sure anyone else was. But it was an IoT product, and that was [on the road] toward AI. And then that group stopped being called Watson IoT and became AI apps. It was then considered an AI app, although again, it didn’t have a lot of AI behind it. That was the last product that I worked on at IBM as well. By the time I left, my team had been moved from IBM to a company called Wipro. We were full-time employees of Wipro, but Wipro was contracted to do the IBM development. It was called an IP partnership. So Wipro owned the new IP, and IBM owned the old IP and then we worked together to build from there. And that’s when design came along.

So IBM did a huge transformation to be a design-driven company. Information developers became content designers [broadly defined, a transition from technical documentation towards user experience and consistent messaging], which was a bit of a rocky move because we had 70-page release notes that were highly used. We were told, “Just don’t do those, now you do content design, so only do content design. If it’s not content design, if it’s technical writing, don’t do it.” So don’t do the release notes, don’t do support docs, tell somebody else that they have to do those. Also with Infocenter topics, try not to do them. So part of that process was trying to move from DITA to Markdown [a simplified markup language] so that developers could write documentation. All the internal tools that build an info center then could [be] use[d to] build a combination of DITA, and Markdown so that it was possible for developers to update Infocenter topics using Markdown. We didn’t switch completely to content design, but we did start designing our apps. The mobile app version and the desktop apps, which did not get much design right before I left, they finally redesigned the admin console. But other than that, it would have taken five years or so to redesign that product. The mobile apps included features like a reservation tool which allowed users to book spaces in the facilities, similar to how you’d use Outlook to reserve a meeting room or similar spaces. That and other tools were included as mobile apps, and those were created by designers that were brought in. For those, we could do content design. I led my team through that transition from info development to content design. I really wanted to do only content design because that really matches who I am and what I’ve always been interested in.

Since Purdue, I’ve been interested in the visual design aspects and visual rhetoric and digital rhetoric in general. That just felt really like where I needed to be. I looked for a new place, and I ended up at McAfee. At McAfee, I’m part of a design organization [and] now we have a chief design officer. We’ve only had her for a few months, but it’s a big, big, big shift. We are going through a huge shift in the culture of the company right now to be a lot more design-focused.

They're recognizing that design is important, and a big, big place that we're failing right now. Now I have five content designers on my team—I had four when I started, and that was November 2021 when I joined—I have five content designers embedded in design pods. They each have their own teams that have a researcher, designers, and a content designer who work with product managers (PMs) on whatever they need to be doing. My day-to-day is now more than ever building cross-functional relationships. I'm particularly concerned right now with the quality of customer-facing writing across McAfee. Basically, I would say my team is the only team of true writers in the entire company. Maybe one of the blog writers you could call a writer. But there is not a unified voice for McAfee. So that is one of the reasons that I wanted to bring AI in (so we can talk about that too).

John Sherrill 12:18. Interesting. So AI as a standardizing feature.

Kate Agena 12:24. Correct. I actually brought up a few screens that I can share to show how we are using it. Okay, this is Writer, the main way that I'm bringing AI in at McAfee. In terms of writing at IBM, I wouldn't really say we used AI, the only thing you could maybe call AI is Acrolinx which is a very advanced grammar spelling style checker. When you get Acrolinx it takes like six to nine months to do the setup to get it to your organization's requirements. It is pretty advanced, it is pretty good, and it is pretty annoying. It tells you that every single sentence you write is too long and there's just like no way to get around that. So Writer is a new tool that has a generative AI portion.

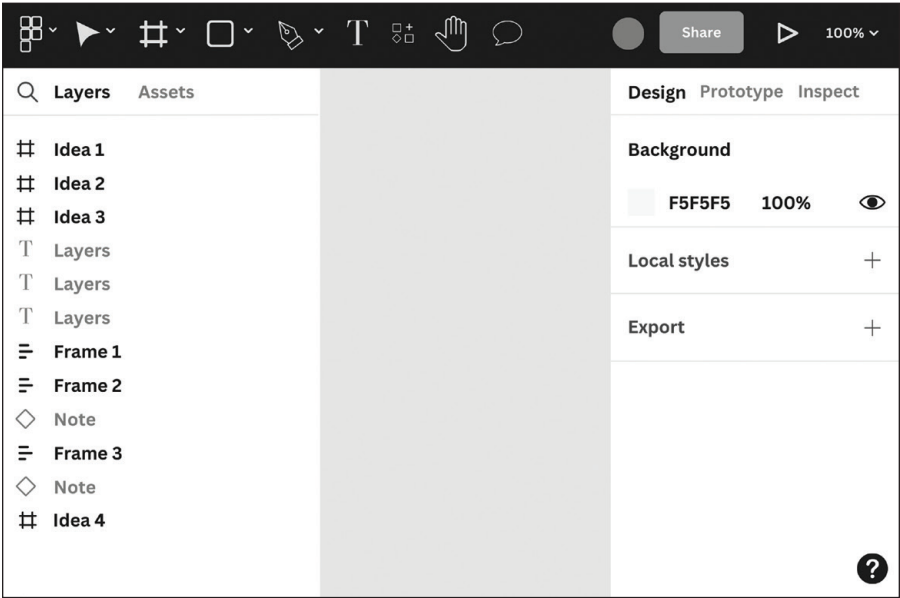


Figure 4.1. An anonymized version of the interface Kate is describing of an artificial intelligence tool Writer used by her team at McAfee. Image created by Teah Byford. Image used with permission.

So it does two different things. One is suggestions that is more like, Grammarly or Acrolinx, it tells you the number of words, characters, average sentence length, reading time, and grade level which is incredibly useful. But then, it also breaks down suggestions into spelling and grammar terms like: style, clarity, delivery, and inclusivity which is really nice, because they have their own stuff set up. Then you can add to it if you want to have additional terminology that you want flagged. So what I plopped in here is the latest blog post from McAfee, not written by my team. We don't do [the] blog posts. So this is published, and if you plop it into Writer, here's what it says. So for example, for our em dashes, we put spaces on either side of them. One that really bothered me—"Whether it's 'indeed'"—doesn't really fit our voice and tone. As I read the blog article, I thought I wasn't going to put it in but checked to see if I could add it ["indeed"] to terms we can't use. But it ["indeed"] was already there, stating "don't use it." So, if our blog writer would use Writer, they could clean all of this up. Even stuff like here [points to a section of the article], there's no comma before "too." [Because consistent use of punctuation is part of a consistent voice, a consistent style.] And, one of the things that's really important with McAfee is getting people's trust. And, how do you get people's trust if you don't have a consistent voice? You don't have quality writing? If you go to our blog about, something like "how to spot a phishing email," well, if there are grammatical errors and stuff that is poorly written, those are some of the first things they say about how to spot a phishing email. And then our emails have similar stuff in them. So that's one of the reasons it was really important to find a way to influence across the organization, instead of just my little section.

At the time, I was really trying to get this done. I was reporting directly to the COO (chief operating officer) and I proposed that we would have a content Center of Excellence or, content counsel, or something like that. And he said, get more creative. That's where I decided Writer came in, so that's my solution. I can show you some of the things that Writer does and how we use it. First of all, I'll show you the setup. So we have this terminology database that we put in all of this stuff. For example, you can put in "feature names" and it'll check that people write the feature names correctly because that's one of the things people mess up all the time. There are maybe old feature names that we change, so it'll flag them. We can put in anything. So I tend to, as I'm reading stuff that McAfee has put out, if I see something that bothers me I just go in here and I add it. You can set it up that way. It has plugins for Chrome, Word, Outlook, and Figma. Writer also has generative AI.

So, this is used a lot less by my team than it will be by marketing. They can use it to create blogs—one of the features that they're just crazy about—called Recaps. They make videos for YouTube, and you can use Recaps—give it the YouTube URL—and it will summarize that video and provide the main points.

I think you can decide how long you want the summary to be: if you want a super short summary, or if you want a longer summary, you can tell it all of that. And it does a really, really good job. People have been impressed with that.

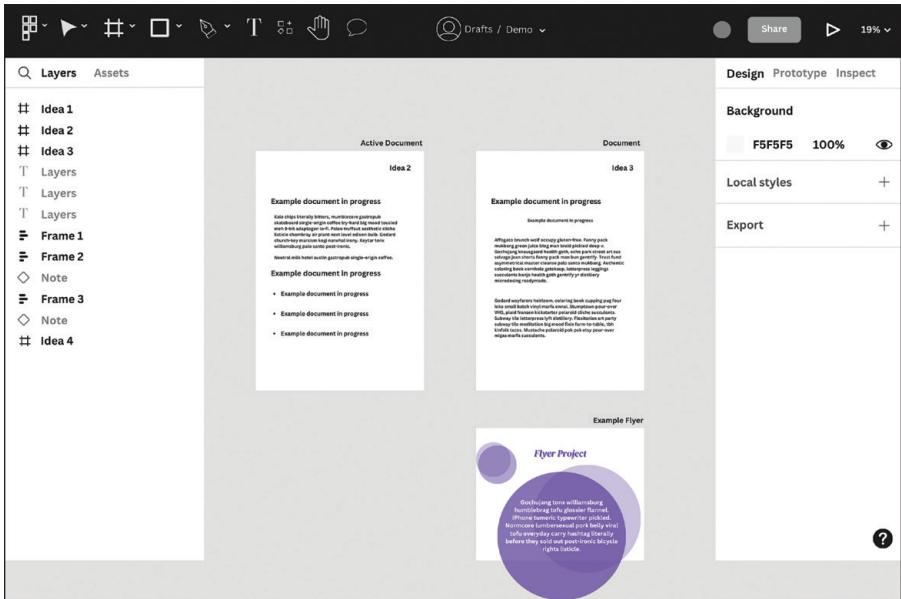


Figure 4.2. An anonymized mockup of the Writer tool used for creating consistent language across blogs and other social media across the organization that Kate Agena describes in the interview. Image created by Teah Byford. Used with permission.

As you see, it can generate blog headlines; it can do email, e-commerce marketing emails, and email subject-line generation. You can put it in a blog post and say “create for me” for LinkedIn, Facebook, Twitter—and it’ll create all of those for those specific social media.

So that’s pretty exciting! It has quite a few different things that you can do. For my team, the way that we use the generative stuff is more using “Ask Writer anything.” And that’s more like ChatGPT. So you can just put in any prompt that you want to put in—we use it a lot to say, for example, “Give me ten different versions of this!” Just to generate different ideas for something that we’re writing.

And then, next I want to show you in Figma ...

Okay, now I will share the other screen. One of the things I’ve learned from years of working from home is to only share the window that you want to share. (Everyone laughs)

Kate Agena 21:09. Okay, so this is Figma (Figma Homepage is screenshared). So this demo file has been released long ago as part of our product. In our product, this is really what my team does. Once I’m in here, I go to plugins, and I can run the right or ... plugin should be coming. Okay, so once you’ve got the plugin running, you select what you want it to check. (Kate runs an automated check for consistent usage of hundreds of grammar and stylistic features across hundreds, potentially thousands, of documents).

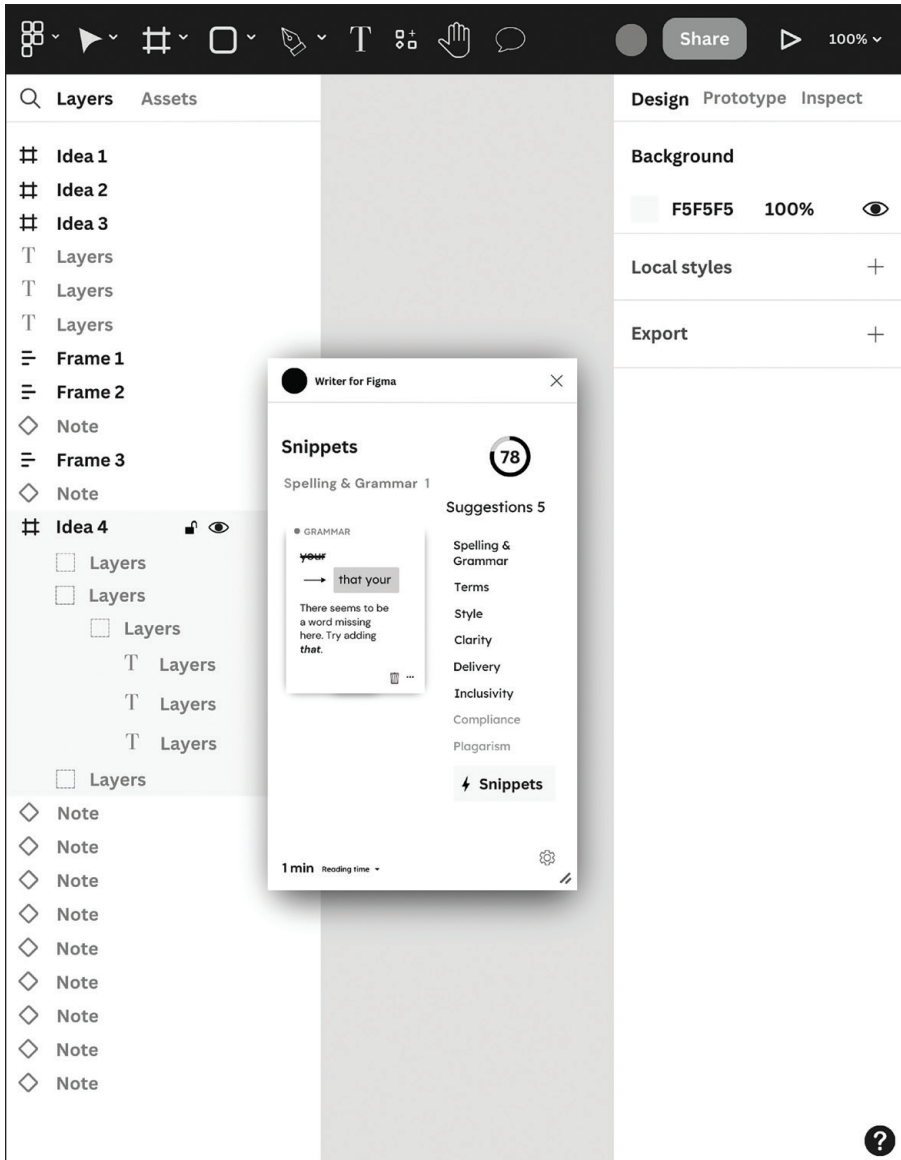


Figure 4.3. An anonymized mock-up of the Writer plugin for Figma, an artificial intelligence-based tool used at McAfee as described by Kate Agena. Image created by Teah Byford. Used with permission.

You get that same [“Oh, it’s doing pretty good.” Okay, that was good spelling and grammar two things.] See, this is the thing okay, they want us to say [“request ‘that your’ info be removed”]. This is one of those things IBM would definitely want me to put “that your” because it’s easier for translation. So that’s not a bad

one. Let's check this one (screen shows grammar suggestion: "Who's collecting -> Who collects"). Let's check this one ["Who's collecting my personal data online?"

It's suggesting "Who collects."] Okay, so you check it and if you don't want it, you can ignore it. See, we've got ["What could happen," and yes, we'd probably want to change to "What might happen."] So it tells you those kinds of things. It also has a thing for Snippets—which we don't have set up yet—but we're going to put in the value props for different products. So you can just quickly grab [and you can] put in a set of text that you would want to use frequently. Then you can just copy it out and paste it in. So for us, we're using it more like Grammarly really, but with the company's specific style checker. Then if we want to use it to generate something, we would have to copy and then paste it into a Google Doc (or something like that), and [afterwards] we can run Writer on it. So that's basically how we're using the AI right now on my team. But primarily in a lot of ways, I'm using it for the cross-company consistency, and using it to educate. [I haven't done it yet that much, but in the terms, whatever pops up—so if I go to this clarity one, this "Switch to active voice" (in the Writer extension) if it's for a term I put that in myself—we can educate writers about how they're using the terms and why they should or shouldn't use the term by what we put in here.] So that's basically the idea.

Michael Salvo 24:28. What I really appreciate about what you've done with that walkthrough is you demystify it. It's not magic. And the other thing that's so powerful in what you're talking about is that it automates so many things that are a pain for us as document managers. [These things] are huge for improving our ethos.

Kate Agena 25:17. Exactly. And we do use it for some other fun things. My team has been deciding on our mission and vision statements. We spent time on a whiteboard. And we put up stickies with a whole bunch of different ideas and voted on them. Then one of my team members took them and is [currently] using AI to help generate what the actual mission and vision statements could be (and different versions of them too), so we can look at and vote on them, and it's fun. He's been using AI more than most of my team members, and is really trying to find use cases where it can save us time. And he has said that sometimes, you know, he'll use it, and something that normally would have taken him 30 minutes might get done in five minutes.

We do have another tool—that I wouldn't really call AI—called Ditto. What it does is it manages the strings. You run it as a plugin in Figma, and it basically finds all the text strings. You mark them, and it generates an ID for each one of those. What engineering then pulls is the ID for the string, not the words. So before, engineering was copying and pasting our words into, [for example], a JSON file [JavaScript Object Notation, similar to XML] with a string ID that they created. Now, we're creating those string IDs, and we're creating that JSON file using Ditto. That way, they can build it using those IDs, and we can keep editing. And [once they're done], they just pull the JSON file that's updated, and it'll build the app with the corrections that we've made. That means [our team] doesn't have

to be done before engineering can build (and we don't have to trust that they copy stuff over correctly). It can do a few other things because it can find similar strings. It can say, "In this file, you said, 'oops, something went wrong four times,' and [in this one] you wrote, 'something doesn't look right' once." [Ditto] can figure out that those mean the same thing, and say, "do you want to make all of those the same?" And you can create components for [your] normal error state.

Michael Salvo 27:54. Wow.

Kate Agena 27:56. That one saves a lot of time, especially if you're changing something over and over. Because we have this sign-on screen that [is] terrible, because it says the heading is like, you know, "sign in to your account," which "sign in" does not have a hyphen; and then the subheading says "Choose your sign-on method," so it does have a hyphen. And then there's a CTA [Call to Action]—like five different versions—and some need hyphens and some don't. The screen ended up without the "Choose your sign-in method," hyphen. And it's used over and over. There was one time somebody had to change it 50 times in a Figma file. With Ditto, even without having it functioning yet, with engineering, you could get in there and find them all quickly. And [with] one click, change them—which is not that different [from] a search and replace. You could have done that before with a decent search and replace tool. But it's still really useful.

Michael Salvo 28:58. Do you find that you have better communication and less friction with engineering and programming because you can do that sort of [stuff] quietly behind the scenes with [the] tool?

Kate Agena 29:12. Not yet because we don't have it working yet, [but] that is the hope. The reason we don't have it working yet is because we don't have design best practices and our Figma files are beasts, and it crashes. So until we restructure the Figma files, it won't really work.

Michael Salvo 29:33. So this is the goal.

Kate Agena 29:35. This is the goal.

John Sherrill 29:36. Oh yeah. That sounds lovely. I was just working on something like that earlier today where I was replacing hyphenated versions. I'm also curious, given the sort of high-security work that you're working with; have you encountered any challenges in using Writer from that standpoint of privacy and security?

Kate Agena 30:10. Good question. McAfee is very difficult to get tools like this approved to use. So for example, we cannot get Grammarly because Grammarly takes your strings, and it runs them on their servers, and then deletes them eventually. But Writer does not do that; they never save your strings. So that's one of the reasons that we could use Writer but we couldn't use other AI tools.

John Sherrill 30:41. Gotcha. My brother runs a web development company, and they work primarily with credit unions. So that's often a major restriction in what tools they can use.

Kate Agena 30:55. Right. Yeah, a lot of those restrictions are because of our partners, not necessarily because of us. To be honest, our own internal security

[is] nothing compared to Wipro's, for example. On Wipro computers, you couldn't do your own work on a Wipro computer. And you certainly could not send anything to IBM, even though you needed to deliver it to them in order for them to put out the software.

John Sherrill 31:22. So speaking of challenges, what other challenges are you encountering with integrating AI into the work you're doing?

Kate Agena 31:31. We're still in that hazy area where they say it can do so much, but you use it and you say, "That's crap." Then you say, "Okay, so I'm supposed to get way better at writing prompts." Well, how good can I possibly get at writing prompts? You know, and people have found, like our marketing writer feels [that] by the time he puts enough into the prompt, he could have just written it himself. So we're finding the kind of Grammarly part to be really useful. But the generative part for a good writer still is not useful. Maybe for somebody who isn't really a writer, it could be useful. But maybe not. I would think they'd be even worse at putting the prompts in, [especially] if you don't know what the important points are. The generative part helps with brainstorming. But to be honest, a lot of times, I'll put something in thinking, "Oh, this is going to really give me some idea." And it doesn't give me anything better than what I'd come up with myself.

John Sherrill 32:46. That largely mirrors my own experience.

Kate Agena 32:49. Others in the organization feel the same. The guy that runs the blogs is pretty helpful because one of the things they're doing is they have a lot of old blog posts. And those were mostly written by agencies. So one of the things they want to do is "freshen up" the language, which we did. We had a brand refresh last year, about the time I joined at the end of 2021 and we changed the voice and tone to be "Now we are the encouraging ally." Before that, I think we were the threatening fearmongers, so it's a pretty big shift and the blog also needs to reflect that.

They have these hundreds of blog posts—but to be honest, I don't know why we need to have all those hundreds of old blog posts—but they seem to think that it has Google hits and therefore it's good. [Our marketing manager] wants to run those through the Writer's rewrite function that I didn't show you. There's a feature where you can highlight text and choose rewrite. It then gives you "Do you want to rewrite it to be shorter ... to simplify it, to enrich it, or to polish it?" It gives you different versions based on those. My experience with it is that it does things pretty terribly, so I'm not sure how well he's going to get that to happen. But just in terms of somebody trying to rewrite it, they could just run the suggestions on it (at least they would find some things to update) and get rid of some of that fear-mongering language pretty easily.

Michael Salvo 34:36. Let me ask a follow-up question. You mentioned the role of AI, and you described it as "fun" when you were rewriting the mission and vision statement. That can be a fraught process because politics gets involved, people want their important things, and it's an opportunity for them. John had a similar situation that he described writing to students who were looking for grade

changes. I don't know if you remember this part of your life when you were a student, but what the AI allowed him—and I think what you're describing—is that it took some of the emotional aspects out of it and could give you some starting text. Do you think that that describes this case?

Kate Agena 35:34. Yes, in that particular case, my team is pretty aligned. It's my little team, so it wasn't an issue. But for example, in that blog post that I showed you from Jas, who's in charge of the blogs. He has a lovely British accent and his writing shows all of that. I don't think he would be offended by me saying, "You know what, Jas, your voice is not McAfee's voice, and this will help you adjust it." However, there was a blog post from the highest product leader, and it's full of stuff. English is her second language. She's not a writer, but she writes blog posts. She gives them to Jas, and I think Jas just publishes them. I think for me to want to approach her about the quality of her writing, having a tool like Writer is really useful because these are the McAfee guidelines. This can help you fit your writing to McAfee's guidelines and fit McAfee's voice and tone instead of, "I saw your blog post, and it has a whole bunch of errors in it, and could you please use this?" It also gives Jas a way to push back. Acrolinx was kind of nice in that way because it offers a quality score. So you can make a rule that says you can't publish something that's below a certain score.

John Sherrill 37:12. So the guidelines are still about workflows and communication, consistency, and branding, yes?

Kate Agena 37:20. At IBM there was a rule like that, but it wasn't enforced. Writer doesn't have that, but it does have a score. However, the score is determined by whether you read the suggestions. Let's say it gets to 100, and 100 is a perfect score. Let's say you have 14 suggestions, and it takes you down 14 points. So you read a suggestion, if you accept or ignore it, you get the point back. But, if you just completely ignore it and don't show that you chose to ignore it, then the score doesn't go up. So basically, it just ensures that people are using the tool. There is also a reporting feature where I can see how many suggestions have been made to a person, how many they accepted, how many they purposefully ignored, and how many they didn't respond to. So that's an interesting aspect. My support leader really wants the Acrolinx way because she's much more of a micro-manager. She wants to see that for each of her writers, she wants those numbers even when they are not good data; she wants to see that her writers are all using the feedback. For me, it's useful in that I can tell who in the organization is using it, and if they're really using it or not using it. That to me is already enough info.

Michael Salvo 39:00. It is a tool that I think is appropriate in an age of remote work. But also, I see ways in which it can be abused, overused, over-relied on. But I think in the right environment, it can be useful.

Kate Agena 39:25. Right. One interesting thing is that, one of the blog writers that actually writes most of the blog posts—they don't have his name on them, but he writes most of them—is a contractor. And he's contracted for 40 hours a week. And his boss, the Head of Brand, said to me: "Is he going to like this? Or, is

he going to feel [that] this is a way to get rid of him if you [have] a way to get his work done more quickly?”

And, I said, “Well, I think he’ll still have to do plenty of work. But, hopefully, he can do it better.”

Michael Salvo 40:03. Well, and also focus on things that are ... [Salvo considers his words]

Kate Agena 40:07. Exactly, exactly! The AI takes care of the lower-level things so that you can actually put your work into the things that take higher thought.

Michael Salvo 40:15. Yeah. Thank you for finishing that. The words were failing me. And John, I interrupted you to bring us back to the mission statement drafting.

John Sherrill 40:27. I was just going to—I guess it was more of a comment than a question—but, thinking about the string identifiers. There’s a lot of overlap there, in terms of going back through the old blog posts: even if it doesn’t do a great job of making suggestions, simply identifying places where that would need to be updated is itself a time saver.

Kate Agena 40:57. Right, absolutely. Imagine that you spend a whole day going through old blog posts, you’re going to, you know, not be seeing anything by the end of the day.

Michael Salvo 41:34. Well, one of the things I am really interested in is innovation. And choice, and decision-making. You know, you talked about being driven by visual rhetoric, and having an interest in design. And so it seems natural to you to have ended up where you are now, right? But you’ve also taken some big chances, and left firms, joined other organizations at interesting times; you’ve also had some interesting side projects.

How do you think about—when you make a decision—what is worth pursuing with innovation, and how do you think about the future?

Kate Agena 42:31. For me, I see the things that I’ve been part of as kind of new movements—I mean, DITA was a completely new movement that became the industry standard, and content design is becoming the industry way to create content in design. And now bringing on AI, I feel like, they were waves that were coming. And it’s, you know, do you want to catch the wave or not? And I prefer to catch the wave as much as I can. I do feel, as I’m getting older, that it feels more of a challenge. You know, there’s so much with this AI stuff to dig into, and I don’t really feel up to the “real work” of getting into all of that and thinking about all the ways we could do it.

Kate Agena 43:28. But also I have an [organization] now. And I have at least two people on my team that are very interested in it. One who’s really interested in figuring out all the different use cases and testing them out. And another who’s also really interested in [“What does this mean for our field in the future?”] He’s going to a conference in Montreal in a week or two. He’s gone. He left ... Wednesday. I don’t know when the conference is, but I think it must be next week. I think it’s called the World AI Summit. He signed up for it in November, and I imagine

how much has happened since he signed up for that [event]. That will be interesting for him to come back and see what he learns at the World AI Summit. I just feel like these are waves that are coming, and I'd rather be on the cusp of them than waiting. For me, the most exciting one is the content design one, [because it just fits with everything I am] and I just see so much potential for it. Right now, it still follows the old trope of the "same thing that we've always done with technical writers." You know, they are under-resourced [and] there's so much that they can do that they're not allowed to do. Basically, in a good situation, you have four designers to one content designer. How can you possibly do content lead design, with a 4:1 ratio? But content really leads the experience, so why are you having a designer do wireframes before you have the content designer come in? You should have a content designer decide what moments of content we need and what interaction, and [then] a designer takes that and puts it onto screens. But when you're 4:1, you can't do that. So that's what I'm really pushing toward, and it's pretty exciting. There are companies [like Asana I talked with recently.] Asana has two content designers. In the entire company ... two content designers. They're both former content design managers from Facebook, but [only] two content designers [with] five product pillars.

(Salvo reacts: "Wow")

You know, so that still exists. Then on the flip side of that, you have Facebook that went crazy and had like 30,000 content designers, and now has laid off 10,000 of them. So, the industry is all over the place, but what's considered a good ratio is 4:1, which is pretty much what I have. It's not enough that you can do content-led design [—it's getting there though—] and having Writer on board helps, because we can automate some of the quick checking. We can prioritize stuff and say, ["you know what, designers, PMs, you're going to put content in on this product that doesn't matter as much, and we're just going to check it." And "this other product that we think content is really important for—this is a high-priority project—we're going to do a content journey that can lead to the design."] That's actually something we're starting, right now. Because they've figured out that dark web monitoring is used by a ton of people. And we haven't given it any attention in years and years. It's not really designed, at least according to our current standards of design. So they want to do a lot of work on it, suddenly. The product manager has been working with my content designer on all of the identity products for a while, and recognizes that he's really sharp and offers a lot. So, the PM actually has requested that he could work with my content designer to do that mapping out of "What are these moments of truth." So somebody gets dark web monitoring, and maybe a little bit later they need some education. So they get a reminder of "What's this for? What's it all about?" because they don't even understand what the dark web is. When is the right moment to get them to understand that? Then they get some kind of notification of a breach. How do we really get them from, "they signed up for dark web monitoring" to "they've actually acted on a breach?"

Kate Agena 48:36. And so what are all these moments in that process? The goal is that my content designer is going to map out that content journey. And we're going to then take that design, overlay it, and see what steps need to happen in between, which is pretty exciting. We're trying to get a handle on other channels. So emails ... we don't have control over them. They're triggered by who knows what, and they're written terribly. And they are triggered through this process. There's also push notifications and SMS. If you're on a PC and GM messages, they are these little pop ups on the lower right-hand corner. So all of those things have not been controlled by design. They're controlled by retention marketing or various marketing groups ... maybe growth marketing. They tend to cross-sell [and] upsell. You know, you're doing something and then suddenly they tell you, "You need to buy something." We're trying to get a handle on (and also map those) [processes]. So we're doing journey mapping with the channels, and the goal is to orchestrate it so that everything actually makes sense.

John Sherrill 50:01. I'm not at all surprised that marketing is in charge of the little pop ups. I use Avast personally, but it's only gotten worse with time.

Kate Agena 50:11. Oh yeah, we have several people from Avast, and our customer lifecycle manager is from Avast. She has brought a lot more journey mapping and a lot of service design principles. We've done service design training. The service design blueprint has the, "what's the 'face-to-face' with the customer" and then all the other layers that happen. So like what's happening behind the scenes? All of that.

Our customer lifecycle manager always says that Avast is great. It's probably not that great either, but at McAfee ... I think the thing we are known for is annoying messaging. So the goal is to try to get a handle on that, because right now we don't own it.

Michael Salvo 51:07. So before we lose you—and this is so exactly what we're getting at and why you're perfect for us to talk to here—you talked about journey mapping, which I recognize as an element of experience architecture and working in that realm. You brought up service design, I know it through the NHS [National Health Service] in Britain. The whole thing is, they don't care about the institution. What they want is when a person arrives at a hospital, how do you get that person to their specialist on time to get the care that they need? So it's different. It's not user centered. It's a different way of thinking about the experience. I know some of it is new to you, but can you talk a little bit about how that's impacted the work that you're doing?

Kate Agena 52:18. So the service design thing has been useful primarily for us in helping cross-functional people understand that this is one experience. So to the customer, this is one experience. Inside McAfee: you are marketing, you are growth marketing, you are retention marketing, you are whatever; but you are a PM for this feature and you are a PM for this feature, and you don't care about how they touch each other. You get some big idea. And you say, "oh, we should do this." Well, if you do this, but not everybody else does, it doesn't necessarily

help. If retention marketing puts in 50 gazillion NGM (Next Generation Messaging) messages, and then a different retention message marketing person puts in 25 more—without looking at the first set. Then we found that in the HP trial journey—it's like if you go to Best Buy and you buy an HP laptop, McAfee comes installed. And there from like, 2020 to 2021, or I don't know if it's 2021 to 2022, the amount of messages you got in 30 days—it must have [gone] up like five times or something. It was ridiculous. And depending on some bugs in the triggering, some people were getting as many as 25 messages a day. And it's all because they're not orchestrating: everyone is working in silos instead of understanding that this is one journey that we are all contributing to, you don't have your own journey. There's a user journey. It's *their* journey. It is not our journey. So that's really what service design has been the most useful in—just changing the culture and providing a way for people to see that. And so we're getting into the point where we're building a lot more journeys and seeing what those look like. And that's really the way to get through to people to say, “look, this thing that *you're* doing to meet *your* numbers is hurting overall, even though you think you're meeting your KPIs (key performance indicators).”

Michael Salvo 54:51. But that's an incredible change and observation, to have 25 messages come through in a day.

Kate Agena 55:00. The only way to find that really was to do that messaging [and] actually try it out.

Michael Salvo 55:07. Unbelievable. John, did you have anything that you were wanting to ask?

John Sherrill 55:15. I am fascinated. I'm learning a lot of new terms as well.

Kate Agena 55:24. Yeah, it's the first year—or, year-and-a-half after I really made the switch to content design—I just bought every book on content design. I know who all the people are in content design now, and it's not a very academic set of people at all. But there is a group that are considered to be the “thought leaders” in content design. To be honest, in most of the stuff I read, nothing was new; it was more a matter of understanding the language that these people are using and how they see this field.

For instance, there were some tools that were useful, and some new heuristics, things like that. But for the most part, there's not much new in the books. In design, I can still learn new stuff, you know—in design theory. But in content design, to be honest, there wasn't that much that was new. But, it was still super important to me to read all the books and listen to the podcast so I would understand what this field considers itself to be.

Michael Salvo 56:38. Right. That's consistent with what we have done with SMEs [Subject Matter Experts] over a long period of time: to know your audience. And so that's consistent. Okay, making sure I understand. Before we let you go, thank you very much. The other thing is, you did a great job—you had much more structure and presentation for us than I had anticipated. Is there anything that you prepared that we didn't get to that you really want to say?

Kate Agena 57:11. No, I just pulled up a couple things quickly this morning. (Laughs)

Michael Salvo 57:17. And so, one of the things that we've got someone, I don't know, if you had a chance to read over the proposal? We spoke to someone who's got lots and lots of experience and has done lots of AI-adjacent work in a more technical field. Another person has done a lot of visionary work, and moved the organizations that she's part of towards preparing for AI—long before this current flood of information.

And, you really bridge those two experiences and the work-a-day. The examples that you gave are invaluable. I think a lot of people at this point are going to have the question: "Okay, what does this look like to me on a daily basis?" And you really hit that in a really beautiful, clear, and accessible way. And we couldn't be more grateful for what you've put together—so thank you so much. And, you know, you talk about not being a teacher anymore, but, you are, and you did that in what you presented to us today. So, we are hugely grateful. And thank you so much.

Kate Agena 59:05. You actually just made me think of something else that's super useful that I could show you: one of the reasons that we love the idea of Writer, is you can have teams. So, right now I just have McAfee. But, I can have another team for marketing, and another team working as support, for example. So, we could have product marketing and support.

And unfortunately, I wish that it was you could have one, core set of terminology and set of rules and then you could tweak from there and say like, "use the default unless there's a conflict in marketing or support." But it doesn't work that way. For now, we just have one team because until we get it tweaked to where we are happy with it, I don't want to copy it to a second team and then start making changes.

But it does have that ability which is useful, because our support team likes to talk about things in a different way than product talks about them. And, marketing talks a little bit differently.

But, there's another use for that. That would be, we could add a team for a partner. So for example, we have partners that take our mobile app, and basically white label it. So it looks like it's a mobile phone company's app. But it's actually our app, but it's in their voice and tone and has their visuals [in character]:

So, their voice and tone is very, like we're very chatty. You know, we're like, Hey, how you doing?

So their voice is very—they're very down to business—

And so we could create another team and put in their style guide. And they also do weird things like they put a period at the end of their headings. So we could change the style guide for their voice and tone. And then take the copied, you know, we start with our Figma files, and then we make a version for them, that has their voice and tone.

Imagine that you could just copy those Figma files to the file for them, run Writer for their team, and it would flag those things. For instance, they hate the word “protections,” and we use it all the time. So, it would flag all of those things—and then using Ditto, you could change all of them at once.

It’s super useful for things like that—otherwise, it takes a human being really having to understand the set of terms in their head, and then going through all the back and forth with the writers from the other company to make sure that everything fits their guidelines. And so that’s a super big time saver for writers.

Michael Salvo 1:01:49. And that’s what I keep hearing, from you and from others, [which] is that it takes a lot of [the] drudgery away. Even though you will have individuals—like you mentioned someone who is like, “Will this person fear that we’re trying to take their job, or job security away?”—and it’s not that at all—we’re trying to make your working life better: more sustainable, more rewarding, more challenging. And challenging in a way that your organization is going to benefit from.

John Sherrill 1:02:23. I couldn’t have said it better myself.

Kate Agena 1:02:29. And I thought of one other thing worth mentioning: titles in content design. So it’s always a super big topic. So there were UX (user experience) writers; what’s the difference between a UX writer and a content designer? What is the difference between a content *designer* and a content *strategist*? So for a long time, they moved away from UX writer to content strategist for the usual reasons that we moved from technical writer to information developer. And then you moved from content strategist to content designer, because you want to be in on it from the beginning of the actual [work with the designers, rather than just ideas]. That’s why, for the most part, we’ve ended up with content designer. But I [also] found that there are people who are branching out and saying, “We’re going to have multiple content roles.” So we have content designers that work with the design teams; but we also have content strategists that work on that content strategy, which is an entirely different thing than content design.

And now we’re seeing more content architects, which I think is really interesting. And to me, that’s an interesting role for this [work] if we’re talking about orchestrating different channels and content that comes from different cross-functional groups. That’s where, to me, a content architect could come in and be [the] one that understands all the different pieces, and how they’re supposed to fit together—which is different from content strategy and content design. I think that’s really interesting right now.

Michael Salvo 1:04:04. That is hugely interesting. We’ll be in touch soon.