

Preface

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The Corporate Terminologist

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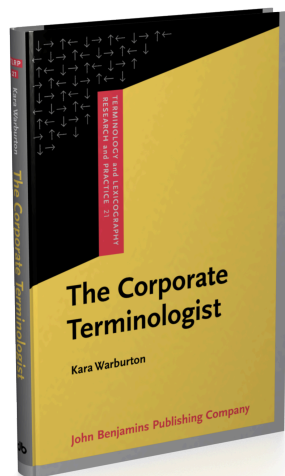
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Preface

This book is intended for anyone who is interested in learning about how to manage terminology to support global communication in the modern era. The focus is on best practices for managing terminology in the private rather than public sector, although many of the principles and guidelines described are applicable to both. It addresses employees of companies or institutions who are taking on the role, formally or informally, of a *terminologist* – that is to say, they have been asked to manage terminology for the organization. They may have other titles, such as writer, information developer, translator, software localizer, translation project manager, and content manager. They may have no background in or knowledge of terminology management.

This book is also addressed to seasoned terminologists who do have experience and/or a formal education in terminology management. Although they may already be familiar with the traditional theories and principles of terminology, we challenge the validity and applicability of some of those theories and principles for enterprise-scale terminology management. They will gain some fresh ideas about how to further optimize the terminological resources that they are responsible for.

The principles and methods described in this book may not only help corporate terminologists do their jobs, but also help them to exceed expectations and demonstrate their true value to their employers.

Key decision makers in an enterprise's global content management strategy are particularly encouraged to read this book, since terminology management is a cornerstone of such a strategy. Any executive who wants to explore how to leverage language resources to benefit translation, authoring, and even enterprise search, will find this book useful.

If you think that managing terminology does not concern you, before you put this book down, we encourage you to read *Does commercial content contain terminology?*, *Motivation for managing terminology*, and *Microcontent*. In these sections, we demonstrate how terminology in commercial settings is quite different from terminology as is conventionally viewed in academic circles, and even by many terminologists themselves. Terminology in commercial settings is *microcontent* which manifests in different ways and can benefit various business applications. Managing this microcontent is critical for commercial enterprises and other organizations, not only to support their success in multilingual global markets,

but also to optimize communications, content retrieval, customer satisfaction, and other core requirements even within a single-language market.

Fundamental principles and methods are introduced at the elementary level, so no prior knowledge of terminology management is necessary. However, some topics are not covered in depth. Furthermore, since the focus is on terminology management in commercial settings, the broader field of terminology management is not addressed comprehensively. Thus having some knowledge of terminology management would be an advantage to readers. To address any gaps, we provide suggestions for continued learning in *Further reading and resources*.

In more than 25 years of experience as a terminologist working in various commercial settings,¹ I have struggled with how to apply the established theories, methodologies, and approaches – which as a classically trained terminologist I wholeheartedly support – for creating and managing terminology resources in companies. I quickly realized that many of those theories, methodologies, and approaches are unsuitable for commercial settings. After searching at length, I also discovered that there are no documented practices specifically for developing terminological resources, i.e. terminology databases, for commercial applications.

With guidelines for managing terminology in commercial settings generally lacking in the literature, I noticed that terminologists working in companies often turn to the ISO committee that sets standards in this area – Technical Committee 37 – assuming that its prescribed methods should be comprehensive and apply globally. And so I became involved in ISO TC37, hoping that those methods would help me too, and that perhaps I could contribute in a small way to their development. However, the terminology standards and specifications produced by ISO TC37 are focused on terminology harmonization and standardization in a multilingual (translation-oriented) context, and for the most part they further the principles and methods of General Theory of Terminology (GTT) (to be explained later). This should not be a surprise, given the historical background of the committee. But through trial and error, I discovered that many of those traditional principles and methods do not work well in commercial environments. In a company, translation is only one of many potential applications of terminology resources, and some of the principles behind the GTT are often unjustified, difficult to apply and sometimes even contrary to commercial goals.

Terminology resources developed to support business goals and requirements need to be *multipurpose*, but the mainstream body of knowledge in terminology tends to lack this vision. This is a recurring theme in this book.

To manage terminology in commercial settings, one needs to be prepared to diverge from convention. When the opportunity presented itself, I challenged

1. 35 years in the terminology field if education is counted.

the applicability of the ISO TC37 tenets to practical terminology management in industrial and commercial settings and was met with opposition. Documented best practices for managing terminology in commercial environments simply do not exist. And so after nearly 20 years of being actively involved in ISO TC37, and more than 25 years working as a terminologist in commercial settings, I decided to write this book.

Our aim is not, however, to resolve the disconnect between established theories and methods and the practical needs of companies. Rather, the aim is to present those theories and methods with a critical eye, and to relate them somehow to the day-to-day challenges faced by corporate terminologists. In doing so we hope to improve understanding about the dynamic environment in which corporate terminologists work and the manifold opportunities that it offers.

It is difficult to find the right term to characterize the type of terminologist for whom the principles and practices described herein would resonate. Later in this book we will see a clear distinction between the principles and practices that are necessary and effective for developing terminology resources that serve public interests, such as those developed by governments to serve the citizenry, and those that are necessary and effective for supporting more institutional, production-oriented goals. This book addresses the latter. Those goals are common in any institution, organization, company, enterprise, industry, and so forth, that is concerned with producing content at large scales and in multiple languages in an efficient and cost-effective manner. But in this digital era, their interests go even beyond that to include concerns such as content retrieval (search engine optimization) and content management.

For lack of a better term, we have chosen *corporate* for this sector. It should be understood, however, that other types of large organizations, such as non-governmental organizations and professional associations, can also apply the principles and methods described in this book.

To place our propositions in the wider historical and professional context of terminology as a discipline and practice, Part 1 begins by introducing the key notions of terminology and terminography, and reviews some of the classical theories and methodologies for managing terminology. In Part II we move on to the commercial environment, its unique challenges, and how terminology work can benefit various commercial processes and applications. We critically redefine what a term really is and introduce the more suitable notion of *microcontent*. To help readers appreciate why managing terminology is necessary, we present some examples of what can happen when terminology is not managed. We conclude this look into the commercial world with some proposals of how classical theory and methods could be adapted to meet the demands of commercial stakeholders.

We then cover some key principles, many adopted to some degree from the classical approach, that should be respected by the corporate terminologist.

Part III covers the preparation and planning phases of a corporate terminology management initiative. We start with the proposal itself, which requires building relationships with management and stakeholders, developing and presenting a business case, and identifying users and their roles. A terminology audit is conducted in an attempt to identify which types of information the terminology database should contain. During this phase, the terminology management system needs to be selected, so we present a detailed description of the various functions to consider.

Part IV is the implementation phase, followed by continuous operation. Topics covered include designing and developing the termbase and its various objects (views, filters, etc.) and of course adding terms. Regular communications and feedback ensure that stakeholders remain engaged and management is satisfied. The termbase needs to grow continuously while its quality and integrity are maintained. Complementary tools such as for term extraction and concordancing are essential for both of these objectives. Finally, we emphasize that the terminologist needs to continuously seek opportunities to leverage the terminology resources in new ways.

The final few pages synthesize what we feel are the most important take-aways from this book. We also share some thoughts on what the future might hold for corporate terminologists.