A Beginner's Guide to a Structured Content Initiative

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SOLUTIONS

Introduction

Industry conferences and presentations offer valuable opportunities to learn about best practices, emerging trends, and new solutions. Attendees return to their companies with ideas about new initiatives and improvements. Though excited and motivated, they're often left wondering where to start.

For individuals who attended the recent CLO Spotlight Webinar titled *Unified Content at USAA*, we offer this *Beginner's Guide to a Structured Content Initiative*.

In our experience, with USAA and other clients, a structured content initiative doesn't have to be a company-wide initiative from inception. It can be successfully implemented by focusing efforts on incremental project wins. The important thing is to get some wins, cultivate consensus, and build momentum. Then, evangelize those wins to expand the initiative within your organization.

This guide expands on the approach of incremental projects and offers suggestions on the types of pilot projects to consider.

A Structured Content Rollout Is Like Eating an Elephant

As General Creighton Abrams once said, "When eating an elephant, take one bite at a time." Likewise, don't attempt to bite off more than you can chew when it comes to structured content. Structured content should be approached in the same manner that you will end up authoring your content—broken down into discrete chunks.

A rollout in a department or function helps to demonstrate ROI, build momentum, create organizational "chatter," and stress test the initiative. In turn, this will prepare you and your team for a dialogue at the executive level. It will also prepare you to execute when funding is, inevitably, provided based on your business case.

In the CLO webinar *Unified Content at USAA*, George Selix, Executive Director of Content Management at USAA, indicated that his team had completed two initial projects over 18 months. The first project involved content for a loan product while the second addressed new regulations on home mortgages. Each project presented different challenges, posed new questions, and increased in complexity—all of which helped the team build a strong business case for structured content. Also, this controlled approach allowed valuable lessons to be learned without the risk of "failures" harming the business or the business case.

Seek Pilot Projects That Promote Learning and Bolster Your Business Case

When choosing incremental or pilot projects, seek those that will provide learning opportunities and develop expertise. Anticipate functionality that will be needed in the future and find projects that will provide opportunities to develop the necessary knowledge and skills.

Results from these pilots can also be used to address anticipated concerns of your target audience. Perhaps efficiency gains will address the CFO's cost concerns. Or, greater content accuracy will resonate with Risk Management. Pursue projects that will provide results that bolster your business case. Here are just a few examples of results-oriented pilots:

> *Content authors can focus more on the quality of the content rather than the format and structure of content:*
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> A financial services company increased productivity and reduced costs by relieving subject matter experts (SMEs) of the burdens of technical writing. Moving to a structured content model enabled them to focus on creating new content, such as regulatory and compliance changes. The project investment of open source tools and internal labor easily cost less than the time SMEs were spending revising and editing content.

> *Content owners save time through content reuse:*
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> Previously when a consumer goods company introduced a new product, content owners wrote a technical guide (which was task based) and sales guide (which was concept based). When the company began working with a third-party reseller, content was needed to promote the product to the reseller's customers. The SME researched the reseller's needs and compiled content, often manually pulling from existing content in different formats.
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> Today content is created using topical authoring. When the reseller needs content, a technical writer in marketing simply selects and edits the topical content required by the reseller. Content reuse saves time and frees up SMEs to develop new content.

Quickly and accurately update content across the enterprise, when a content gap is discovered:

Until recently, when USAA discovered a content gap (and error, missing or poorly written information, etc.) the SME researched the gap, made edits to the source documentation, and manually updated all known instances where the source content was used. This might also trigger some additional updates to the overall content. Any derivative content created by someone other than the SME continued to use the material with the content gap until it was discovered by an employee or, worse, by a customer. This was an extremely time-consuming and unreliable process

Now, using a structured content model at USAA, the SME proactively edits their content domain to reflect new or changed information before a gap develops. An automated workflow simultaneously updates all source documentation in the workflow. Compared to the previous approach, this decreased the cycle time required to identify and make the edits by four weeks.

End users quickly access the right content at the right time:

A global medical equipment company struggled to maintain service materials used by their field technicians. Hard copy binders were produced using a very manual process in Microsoft Word. Technicians leafed through binders while conducting on-site repairs and upgrades. It was a very complex, cumbersome and costly process.

Moving to a structured content model, the company now publishes service materials electronically on a tablet. Content that is authored as topical tasks or concepts is used in a robust search engine, which enables field technicians quickly find relevant content. Also, personalized content is "pushed" to the technician when needed based on their job role, competency or the assigned service order.

Don't Reinvent the Structured-Content Wheel

When planning your pilot, consider structured content initiatives, which may already be underway in your organization. Perhaps someone in Learning & Development, Field Service Management, Product Development or Customer Service is currently using the Darwin Information Typing Architecture (DITA) XML data model? If so, you have an opportunity to get their input on content tools and best practices. You might even be able to share the cost of a software license they are using to author, manage and publish content.

DITAWriter provides a running list of all companies who have identified themselves as using DITA XML. You might find that your organization is one of them making it easy to find common ground with fellow employees in these areas.

The Center for Information Development Management (CIDM) is another good source of information sharing. CIDM host an annual North American conference where many companies' present lessons learned oriented workshops regarding their move to DITA XML. You may find more detailed information regarding whether or not your company is leading a structured content initiative.

Make Sure Your Pilot Program Has the "Right Stuff"

Make sure your pilot projects have the "right" source content or source documentation. Choose content types that have a high potential for ROI. Choose content types that represent the content your company could work with in the future. Considerations regarding content types include:

- How stable is the source content? You will have an opportunity to demonstrate greater ROI if the source content requires frequent updates.
- Does the content support multiple channels and users? This represents a good opportunity to reuse content for different purposes ranging from partner training and engineering specs to marketing materials and customer service k-base.
- What percentage of the content is organic and organization-specific compared to third-party content? Typically, you won't have ownership of third party content.
- Do support organizations internally frequently interface with the business subject matter experts (SMEs) and content owners? Do they work with their source materials and documentation to understand the context around the content?
- Does the content support a global audience with translation and localization needs?
- Is the content a candidate for performance support, on the job training (OJT), structured on the job training (SOJT) or other solutions that involve real-time learning and knowledge at the point of need or on the job?

If you do find an internal department or function already using DITA XML (above), they may also be working with the ideal content type for your pilot project. Take the path of least resistance.

When Looking to Expand, Follow the Content

With a pilot project under your belt, the process becomes a matter of determining where and how to expand your initiative.

Seek out other users of that content for your next project. For example, if you developed a structured content system for Product Development to maintain technical specs, it's likely that Marketing, Customer Service, and Field Service could also use that content. This makes them good targets for expanding the reach of your structured content initiative.

It also allows for the optimization of ancillary components of the content lifecycle. For example, you could prove out the ability to translate & localize the content, publish to eLearning, create ILT & performance support templates, and use reference objects to cross-reference non-structured content resources.

A basic information mapping exercise (a method for writing and distributing information based on the audience's needs) can help uncover the extent of content usage across the enterprise.

An information map will help you evaluate the extent of the content distribution channels and determine if your initiative would benefit from a component content management system (CCMS), which facilitates the authoring and publishing of content. Moving to a CCMS is usually a significant decision for organizations.

Increasing the breadth and depth of your structured content initiatives allows you to expand your experience, become versed in authoring and publishing functionality, gain visibility, and have a more strategic impact in your organization.

Anticipate Author Adoption

Ultimately, the content authors will likely become the SMEs and content owners in your organization. So, understanding the needs of potential SMEs/authors or product owners/business content owners will help improve the adoption of your structured content initiative.

It's common to receive pushback from people on new initiatives. This can be the result of resistance to change, ownership issues, or other organizational issues. It's human nature. So, be sure to involve your authors at an early stage and with a great deal of anticipation and empathy.

The ability to make the new authoring process simple and intuitive is the goal. Keep in mind there are several authoring tools to choose from. A tool like the DITA Open Toolkit (DOTK) is open source (free) but may be challenging for some SMEs to use. Off-the-shelf software may be easier to use, but comes with a cost and may be limited in functionality. A custom UI/UX can deliver exactly what you need but will come with a cost. Finding the right balance between cost and ease of use will go a long way towards adoption.