

Planning Your Single Source Strategy

Introduction

You probably already know that a lot of your organisation's informational content is being created, re-created, and re-worked by different people in different teams, probably in different locations and time zones as well. You'll also be aware that a lot of duplication of effort is going on around you and that a large amount of the content you are seeing is itself being duplicated, resulting in multiple, inconsistent versions of important, even critical information.

Even worse, it's quite likely to be the case that informational content is being developed and managed in different teams or departments completely independently and in isolation from each other. The content is stored in file and folder systems inside departmental or workgroup servers to which access by other groups or departments is restricted or barred. There is no collaboration between different departments producing and publishing the same or similar content. This is commonly referred to as the '*silo effect*'.

The end result? Poor customer value perception, unnecessary business inefficiency, low levels of staff productivity, and unnecessarily high levels of both direct and indirect costs. There is also an increasingly higher risk of legal or regulatory non-compliance.

If you have recognised the above then you have almost certainly worked out that your organisation badly needs a single source strategy (also known as a *unified content strategy*) to help resolve these deeply worrying problems. You'll know that means

centralising the development and distribution of informational content and bringing it under stricter control.

In this article, we outline the steps you need to take in order to plan and implement a single source/unified content strategy. There are three main activities involved in getting from early stage problem definition to the point where you have a solution up and running in the business:

- **Project inception:** the current state analysis and research you need to carry out to ensure there is a business case and the justification to proceed
- **Business plan development:** the cold hard facts and figures you will need to gather together and communicate in order to win the funding required to go ahead operationally with the project
- **Solution design and development:** what you need to do in order to get from your detailed requirements to having a working solution being piloted and tested.

Where do you want to be... where are you now?



We recommend you start your research and analysis by first talking to **your customers** and asking them where *they* want to be and what they struggle with now.

Keep in mind your customers are everywhere in your supply and value chain. They can, for example, be:

- Members of the general public who are the purchasers and consumers or end users of your products.
- Employees of external fee paying customer organisations who have purchased your products and are also the end users of your products.
- Staff at partner and licensee organisations who collaborate in many different ways with your company and its products.
- Personnel working for third party development or software engineering companies who, for example, extend or adapt your products for other markets or platforms.
- Your colleagues. Significantly, let's not forget that your customers almost always include the employees of your own company.

Knowing where your customers want to be and where they are now makes it that much easier to understand and define where *you* want to be and what solution you will ultimately design and deploy. Or, to put it another way: by first understanding your customers' requirements and their pain points, the task of defining your own requirements will be easier to do and you will do it faster and be more effective. You'll develop your final, detailed set of requirements later, prior to starting the solution design and development stage of your project.

You'll be looking to build a picture of where content is developed, managed and maintained, translated, and published; how and where (and by whom) that content is used (internally and externally); and how and when (if at all) content is being developed collaboratively; and much more.

The questions you'll want answers to will include:

- What quality concerns exist around the content currently being delivered?
- What tools are being used to create content and how much effort is being expended on conversion and re-formatting?
- How and where is content being created and stored?
- How, where, and when is content delivered and in what formats?
- How easy or difficult is it to find and retrieve required information?
- How is it maintained, where is it maintained, and by whom?

There may of course be many more, depending on the size and scope of your organisation and your supply and value chain.

You will also be gathering intelligence on the direct costs being expended in the way your company currently operates, and you will be researching and calculating the indirect costs and associated overheads involved. Direct costs include software licensing, translation, printing, and photocopying. Indirect costs include staff time and support call time.

This is where you start to identify the business inefficiencies, the duplication of effort, and the resultant impacts on people's time and productivity. Then, when you come to put your business case together, all these things will translate into the costs and other bottom line financial impacts that form a vital part of your business plan.

When you come to develop your business plan, you should be able to highlight the many different ways in which these costs could be reduced by your single source strategy and Content Component Management (CCM)-based solution. Here are just a few:

- The single-sourcing and re-use of content, managed and maintained in one place, greatly reduces the current costs of producing multiple versions of the same informational content by different people in different departments or teams.
- Additionally, informational content will exist only as single course modules or topics, which are then assembled into multiple deliverables according to customer needs. That means you will eliminate a number of time-consuming development and pre-production activities, such as reviewing, editing, testing, and approving.
- The single source CCM solution automates the assembly and delivery of informational content in multiple formats as required. That means you will be able to make major reductions in production and publishing costs: activities that currently require significant manual time and effort.
- Customer support costs can also be reduced significantly. For example, because all informational content exists in single source modular form, it is much easier to

search and find a specific topic. That means support people can answer the question they have been asked by, say, a customer, more quickly and accurately.

- If your content is translated into other languages, you will be able to show that further major cost reductions can be achieved. The single source CCM solution allows content modules to be translated once, and once only, before output assembly. From that point onwards, only individual modules that change need to be re-translated (and not entire documents or libraries as is currently the case).

Building a credible and compelling business plan



The terms business case and business plan are often used interchangeably. Business cases are generally seen as proposals for gaining funding or investment.

Their purpose is served once a project receives the approval and the funding it needs to proceed.

Business plans go a lot further.

Business plans naturally include the business case required to inform and support the decision by senior management and budget holders whether to invest or not. But they also define the required project delivery and business outcomes, including answering questions such as:

- How do we minimise risk?
- How will the project be managed?
- What specific changes will be made?
- What are the benefits of making those changes?
- How will required business outcomes be realised?
- How do we identify and track benefits realisation?
- How do we measure success and return on investment (ROI)?

Let's assume your primary goal (or mission statement) reads something like this:

'To introduce a unified content strategy into the company, changing it from being a fragmented and siloed organisation to a collaborative organisation where all relevant information resources are managed and maintained in one place and one place only. Content is single source and reusable in different ways depending on customer or audience needs and profiles. With this strategy, the company will always deliver an accurate and fully up-to-date single source of truth that its customers can trust and work with'.

By talking to your customers and understanding their customer experience, their pain points, and their own requirements and goals, you will have **already** gained a vital insight

into the value chain and what value perception customers have of your company and the information you provide about your products (or services).

“ Savvy organizations make “Content Climb the Value Chain” to enhance operational efficiency and customer experiences.

➔ Source: MWD Advisors/Alfresco Software Inc. (2018)

Cost and customer experience are the two main factors or criteria that shape and define customer value perception. An organisation’s value chain, which includes providing services such as high quality documentation, training, and comprehensive post-sales support, is geared specifically towards improving the customer experience.

Customer experience (CX) and value perception are high on the corporate agenda these days. Companies know that it makes much more sense to keep an existing customer (and keep that customer happy) than to lose that customer to a competitor and then have to go out and find a new customer. It’s less expensive too and the longer term bottom line benefits speak for themselves.

Your business plan is about showing the benefits and cost reductions to all parties in the supply and value chain of implementing a single source CCM solution. It should focus on defining and explaining the following key areas:

① Customer value proposition and benefits

The plan must reflect the value proposition and benefits to the customer, based on the need to improve CX and value perception, because of the customer’s current and ongoing needs, frustrations, and concerns over costs and overheads.

② Organisation benefits and operation efficiency improvements

It must show, convincingly, how operational efficiency will be improved. That includes the business outcomes, the benefits (tangible and intangible), and the cost savings (direct and indirect). It must also demonstrate that the strategy and the plan supports and aligns with overall business/corporate strategies and values.

③ Project strategy and control

The plan also needs to outline the project strategy, by which we mean the way the project will be managed and delivered. This should include information on how you will perform important functions such as risk management, change management and change communications management, benefits realisation and tracking, and management reporting. If your company has a project office or dedicated project manager, they will help you with all of this.

④ Return on investment (ROI)

It must include a calculation of the potential ROI. You should already have a reasonably accurate assessment of what your costs are today. Now you will need to calculate the cost reductions you could make by implementing your single source strategy and by automating and improving content development and publishing processes.

You then need to factor in the estimated cost of developing and implementing a CCM solution, including the purchase and licensing of software and the services of a systems integration specialist (or company) to help with development, testing, and deployment. We cover this in the following section.

Solution time: think big, start small



By now, in addition to drafting out the business plan, you should be bringing together and finalising your list of detailed requirements, based on the research and analysis you did with your customers and other stakeholders inside your own organisation.

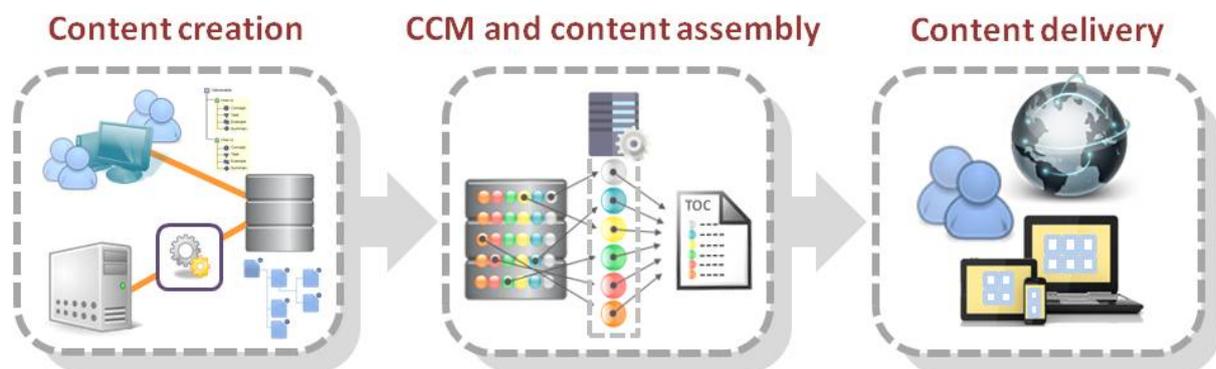
In parallel to doing that, you'll need to complete the ROI section in the business plan. Which means you need to have an idea of what the total cost of the solution will be.

We have divided this section into the three main activities you and your team need to complete in order to get your solution deployed and tested as part of a pilot project.

- Completing high-level solution design
- Identifying solution and infrastructure costs
- Planning and preparing a pilot project

1 Completing high-level solution design

The solution itself will naturally vary depending on your organisation, the nature of its business, and the specific requirements. However, any solution you design will almost certainly be comprised of three core functional components, as illustrated below.



- The content creation component is comprised of two main areas of functionality: the XML authoring environment (for your professional technical content creators) and the toolset that handles and converts informational content originating from other content providers, for example from legacy systems and other applications.

- The component content management system (CCMS) repository and the content assembly software that builds the required information products from the selected single source content modules. The CCMS and its repository should handle single source modules in different languages, ready for interface to translation software.
- The content delivery component contains the publishing tools that handle the delivery of informational content in multiple formats (e.g. PDF, HTML, MS Word) and to multiple channels (e.g. PC, tablet, mobile phone, print).

② Identifying solution and infrastructure costs

The first step here is often referred to as the *vendor selection process*. You need to research the available products and contact suitable CCMS vendors or suppliers by sending out a Request for Information (RFI). The RFI is designed to help you find out whether or not the company and its products are a suitable fit. The RFI contains an outline of your project and your high-level solution design, as well as a list of the general, high-level, requirements.

When you have a short list of prospective companies whose product offerings meet your general requirements, you then follow up by sending those companies a Request for Proposal (RFP). The RFP focuses much more on your detailed requirements and should also include a Request for Quotation (RFQ). The response to the RFP/RFQ will also be detailed and will allow you to make your decision on whether or not the product offering, the vendor's experience and knowledge, and the price quotation are what you are expecting and looking for. After that information is in, you select your vendor.

The next step is to finalise your initial estimation of all the costs involved so that you can feed that information back into the ROI section of the business plan. These costs include the software and tools infrastructure, consulting, development, system integration and testing, plus evaluation and planning for further phases. Here are just some of the likely costs you may need to consider (these may be calculated or estimated):

- Finalising all detailed requirements and completing final system/solution design.
- Purchase of CCMS, including single source XML repository, assembly engine, and multiple media output publishing toolset.
- Purchase of conversion toolset for content being imported from other sources and in other formats.
- Purchase of XML authoring and editing software.
- Information architecture analysis and design followed by the development of an information model upon which all future informational content will be based. This includes designing the metadata needed to 'label' or categorise content units.
- Design and development of the XML schemas or Document Type Definitions (DTDs) that, among other things, define the allowable document types and their constituent elements.
- Fees for the system integration and testing services that will be required to ensure the three main functional components (see illustration above) are functioning

together correctly. You will need to identify and contact companies or consultants with XML system integration experience.

- The time and effort required for business analysis and research, for development of the business plan, for the vendor selection process, for all design and development and set up activities required for pilot project readiness, and for future phase planning.
- Fees for the training of your professional technical content providers on the new XML authoring environment and on the XML schemas or DTDs.

③ Planning and preparing your pilot project

A pilot project allows you to roll out some basic functionality and show some immediate results. It's about testing the tools and technology you've purchased and it provides the opportunity for staff training and familiarisation. A pilot project should also be used to test the information model and existing processes and workflows, identifying the changes or improvements that will have to be made before proceeding with full deployment.

We recommend you *start small and think big*. That means selecting smaller-scale, more self-contained informational content to work with during the pilot, and it also means planning the project so it can be completed in a relatively short time frame (ideally no more than three or four months). If your company already works with a translation agency, you absolutely must include a trial translation run into your pilot project plan.

Product documentation is usually self-contained and is always a good candidate for selection. You can, for example, choose to work with a high level document (such as a product overview) and a lower level document (such as a user guide). However, be careful not to choose a product where the existing documentation is completely unstructured and requires rewriting from scratch. Rewriting a document completely would in itself take up all the time you have available. Select a new or existing product where, for example, the documentation has more structure and more new provisional content and is, therefore, easier for **your** professional content providers to convert into the topics or modules that will reside in the CCMS repository.

Your pilot project plan is an all-important document. In addition to outlining the goals, scope, activities, and required outcome of the pilot, it should define the critical success factors (CSFs) and the metrics being used to track and measure progress. You will need to appoint into your project team a strong and committed project manager - someone who is enthusiastic about seeing content management succeed in the organisation and who understands the importance of customer value perception.

The plan also needs to address project control aspects such as risk management and change communications management, effectively linking back to the business plan.

Your project team may include representatives or consultants from the tools and technology vendor(s), from the system integration team, and also from your own company. It must also include other skilled and motivated people with relevant experience and expertise, such as a business or information analyst, an information

architect, a senior technical communicator, and a technical support person who knows the XML tools and technology side of things.

So what's next?

As you run through and conclude the pilot project, you're already seeing your single source, unified content strategy at work. Then, it's time to roll it out further into your organisation. You first need to document fully the results from the pilot, for example, outcome, risks, challenges, successes, and how you intend to resolve any challenges or issues before moving on to the next phase. You'll probably do that in a wrap-up meeting with your team and other relevant business stakeholders, and then report back to your executive sponsor.

In preparing your plan for enterprise-wide deployment, we recommend you opt for a series of phased rollouts. One of the first tasks you will need to do before moving on from the pilot is looking back again over all the informational content inside your organisation and deciding what to bring in under the control of your CCMS, and what not to.

If you are planning to pilot CCM in your organisation, why not contact us to find out how we can advise and help?