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Six (Sigma) Reasons to Embrace Enterprise Content Management

Six Sigma is the formal discipline used to rethink and, if necessary, redesign business operations from a customer-centric position to improve business performance and maximize customer satisfaction. Customer-centric Enterprise Content Management (ECM) is all about customer-facing content, regardless of how the content reaches the customer, be it in print, on the Web, via interactive customer support systems, or over the telephone, where “customer” designates both internal and external recipients of content.

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CM And Customers, Managing Relationships

The typical Web redesign results in a better looking more usable site where your information resources are easier to find. But so what? The typical Content Management System (CMS) implementation results in a more efficient process and better organized information. But so what? What does all that really get you?

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Building a Content Framework

A content framework is a library of content types and metadata along with detailed guidelines for how to use the framework to create specific customer experiences. A content framework provides the underlying concepts, best practices, guidelines and structure to enable you to rapidly design, build, test and deliver an effective customer-centric content experience.

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It's All About the Customer

Organizations create content and lots of it. Much of the content we create is for customers. Typically, content management projects are focused on process improvement and reduced costs, all good reasons for content management, but savings will only be sustainable over the long term if we focus on the customer.

This issue of *The Rockley Report* focuses on customer-centric content management. Ann Rockley begins by defining customer-centric content management and later goes on to describe the components of a content framework that underlies a successful customer-centric content management strategy. Bob Boiko discusses how you address the needs of your customers and in a second article outlines how you can manage the customer relationship through content management. Emma Hamer illustrates how Six Sigma can provide powerful reasons for viewing enterprise content management as a strategic business initiative.

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What is Customer-Centric Content Management?

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Customer-centric content management addresses customer needs at every touchpoint, while driving down content costs and improving processes. This article identifies why we need to move to a customer-centric content management focus and provides an outline of its components.

Good customer relationships are at the heart of business success and the way you communicate with customers is critical to that success. Inconsistent, poor quality, incomplete customer-facing content or content that does not assist your customer to achieve their needs, whether intended for the Web, product documents, or marketing collateral, can have serious consequences, such as a brand deterioration, lower customer satisfaction, and even legal liability.

Organizations typically cost-justify and adopt content management based on:

- Increased content control
- Reduced time to create, manage and deliver content
- Reduced localization costs
- Increased quality
- Better support of regulatory requirements

These are all very good and very effective reasons for adopting content management, but they deal with the organization's reason for adopting content management and do not address the requirements of the customer, the people who use your content. Frequently, there is no customer-centric strategy across the Web site, let alone across all the other points at which the organization can touch customers with messages, content, or functionality. For the organization, it is difficult to assess the value that content adds to business goals and aligning content across the silos (pre and post-sales materials and customer support) is difficult. Initial gains as a result of process improvement-oriented content management can be sustained only if you address customer needs. More importantly, it is the customer's needs that will address your overall organizational needs.

This means that you need to focus on the customer. You need to address customer needs at every touchpoint (Web, print, call centers, mobile, kiosk, etc.) You need to provide a seamless experience for a customer from their first contact (pre-sales) through purchase, usage, maintenance and back through the cycle again as they continue to purchase and use your products and services. For example, you want to be able to link from materials like user guides or FAQs back to current marketing campaigns that would assist your customer in broadening their use of your product or service. Or you could make it possible for someone who is exploring a product for potential purchase to link into a tutorial to get an understanding of how it works (typically post-sales materials), or link someone from a user guide to an FAQ and then into self-serve to change some of their options. The customer follows a continuum of discovery and knowledge acquisition and your content strategy needs to reflect this.

In addition to the Web, you need to focus on carrying the customer experience across the channels (print, mobile, customer service). Too often the customer receives a disjointed experience as they make their way through the many siloed communication touchpoints. For example:

- An existing customer hears about a promotion and they wonder what it would cost if they added it to the services they already have in place. They can find lots about the costs of the service alone on the Web but can't find out what it would cost with their other services. They call customer services to find out. Customer service doesn't have any information on the new service (they are working with an entirely different set of content that hasn't been updated yet) and can't help.
- A customer is pondering the purchase of a new product. They can find lots of marketing information, but not information that would really give them an understanding of the product and its functionality. They decide not to purchase because they simply don't have enough information to make an informed decision. If they had access to the product usage/support materials they might have been able to make the right decision.
- A customer is trying to figure out how to get a certain set of functionality. They find a relevant FAQ that tells them how a feature should be set, but they don't have that feature configured so

they can't make the adjustment. They give up in frustration and call customer support. If they had been linked to the self-serve portion of the site, they could change their configuration on their own.

By thinking in terms of where the customer is at any point in the lifecycle and providing content for whatever they need/want to do next, we can provide a more unified and effective customer experience.

Conclusion

Organizations create huge amounts of customer facing content and they are putting a lot of time and effort into managing their customer relationships. However, content is usualy siloed and does not provide maximum value to customers because content is not easily discoverable, lacks consistency from one silo to another, and is limited in implementation and value. For the organization, it is difficult to assess the value that content adds to business goals and aligning content across the silos (pre and post-sales materials and customer support) is difficult. There is no customer-centric content strategy across the Web, let alone across all the other points at which the organization can touch customers with messages, content, or functionality.

Customer-centric content management addresses customer needs at every touchpoint, while driving down content costs, and improving processes. A customer-centric strategy:

- Identifies customer needs and tasks at every point in the customer relationship lifecycle
- Identifies key and optional content for every lifecycle phase
- Provides paths through the content that ensure customer task success
- Optimizes content retrieval and delivery
- Bridges content silos to ensure harmonized branding, messaging and content within and across channels
- Optimizes content reuse for consistency and accuracy
- Reduces the cost of content creation, localization, management, and delivery

Who Wants What Your CM Puts Out?

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As any good writer or speaker will confirm, if you do not live by the code of your audiences you will die by the sword of their neglect. Audiences consume your information. It is not so hard to begin to understand what they want and how to provide it for them. From this understanding you can begin to craft a deal whereby you give your audiences what they want and in return they help your organization meet its own goals.

Introduction

Customers are audiences for your information. To be customer-centric is to be audience-centric. I like the term audience a lot because it has just the right set of connotations. An audience can love or hate you. They can stand up and applaud or fall asleep. They pay good money (or other tender) to consume your information and they expect value in return. They are customers, but they are also users, members, constituents, opinions leaders, middle level managers, partner liaisons, and a million other kinds of people. They are the kinds of people who can help you reach your goals. Moreover, for our purposes, they are the kinds of people who will help you meet your goals if you can just get to know them enough to supply them with the right information.

For you, a person, to know another person is one thing. For a computer to *know* a person is quite another. For you or me, a person isn't some set of data points; she's a complex being whom we intuitively "get." You say that you know someone if you can recognize her and can accurately predict what she may do, say, and want.

No computer that I know of can "get" a person in this sense, so you better settle for something less. You can settle for coming up with a few isolated traits and using them to try to predict wants. And, amazingly, that approach basically works. In most of the circumstances that you face in a Content Management System (CMS), you can limit the number of potential wants that you serve. You can also draw wide enough distinctions between your users that determining who's who and what they probably want isn't too hard. As you learn to discern more traits more accurately, you can continue to get better at predicting more wants for more people.

In a CMS, it is not enough to want to know and serve your audiences. You have to encode your knowledge into a set of user profiles and rules that can guide the creation and delivery of content. In this article, I'll help you get from the desire to know your audiences to the steps you'll have to take to serve audiences with a CMS.

What is an Audience?

Although many disciplines talk around or about audiences, I've never seen the concept nailed down enough to become specifically useful in the context of a CMS. It would be nice if someone had already figured out who the most important audiences are for your organization and how to serve them, but this is probably not the case. If your organization has any existing information on this topic, it is probably in the form of some type of marketing analysis. Although not used exclusively by commercial organizations, such an analysis usually defines the kinds of people you want to sell to and how they might be convinced to buy. This sort of analysis is good as far as it goes, but it does not go nearly far enough. A marketing analysis defines external audiences. A content management audience analysis defines segments within your organization (administrative assistants, or line managers, for example), in partner organizations (purchasing agents or partner liaisons for example), as well as outside the organization. In addition, the people in a content management analysis might help meet goals that are not strictly economic (like employee satisfaction, or increased community service).

My approach to audience analysis borrows heavily from marketing. I believe in the notions of segmentation and profiling. To automate information delivery with a CMS, you need to tie groups of people together by using data about them. But my approach borrows heavily as well from communication and computer science:

- The written and oral communication discipline has the idea of an audience analysis, which tries to define what you need to know to "speak" with clarity and authority to a particular group of people. Content management is necessarily involved in communication. In fact, I firmly believe that a content management approach will come to dominate organizational communication in the 21st century. What I call information strategy is really communication strategy. At its base, it is no different than what every modern political campaign (and now every administration) attempts to do to understand and move the audiences it speaks to.
- Computer science has the notion of a user as a kind of person that an application must serve psychologically and ergonomically. Content management is almost always concerned with users because information is very often delivered to them via some user interface. Information is increasingly delivered interspersed with computer functionality and cannot be detached from it. When users navigate through information they use functionality as well. This functionality completely obliterates the distinction between user interface, information structure, and text. Every audience you deliver to has to be able to use the delivery systems and, more to the point, has to be able to use (not make use of but make its way through) the information.

So, the idea of an audience that I pursue is a combination of the profiling and direct marketing approach of the marketing discipline, the audience analysis approach of the communication discipline, and the usability approach of computer science.

That's enough on the idea of audiences. Let's turn now to their practicalities.

Audiences are at the Base of a CM Strategy

At the same time as you want to serve your audience, you also want to get something from them. The more that you know about people, the better you can anticipate their needs and provide them with just the right content. The better you serve them, the more they will help you get what you want as an organization. This is the basis of content strategy—deliver content that helps your audiences help you reach your goals. The more effectively you can gather and deliver such content the more you will be able to help your organization. This is the basis of CMS strategy—build systems that deliver strategic content.

To get to content and CMS strategy, you can begin with simple value propositions. For example, suppose as a non-profit relief organization you form this value proposition:

> Potential members want a way to help fight world hunger. We want more members so we can fight world hunger.

This value proposition is balanced. Your audience's need is in harmony with your need. Of course, it's not this simple. Potential members must be found, they must hear your message, and they must be convinced that their financial and time commitment to you will alleviate enough hunger to be worth it.

This is where content and CMS come in. The content strategy defines the content that will demonstrate the balance to potential members. The CMS defines the system that can cost effectively push that content through the communication channels most likely to reach these people. The content strategy defines the audience "Potential Member" in a way that is directly useful. It states what the defining traits of potential members are, and under what specific circumstances they should receive what types of content. The CMS details the machine that will make it possible to recognize potential members when they arrive, for example, at your home page. It details how you can more and more efficiently tailor and package information given the specific traits of potential members that you have discerned.

A full content strategy covers all audiences and content that most significantly impacts your goals. A full CMS covers the flow of all that significant information from wherever it is originated to the eyes and ears of all audiences.

Serving vs. Exploiting Audiences

The better you know audiences, the better you can serve them. On the other hand, the better you know audiences, the more you can manipulate them. This paradox plays out on both sides of the computer screen. Users expect the Web sites that they visit to be smart enough to anticipate their needs. They gravitate toward sites that seem to know them and remember their preferences. On the other hand, users are wary or even hostile toward sites that ask a lot of questions. The question immediately comes to mind: "What are they going to do with this information?"

Direct marketers live by the creed of "Know thy audience." They collect as much information as possible on you and then carefully craft a message that they think you may respond to. Direct marketers live and die by the lists of targeted audiences that they create. Marketers walk that very thin line between serving their audiences and exploiting them. And, very interestingly, the line isn't a sharp one. Consider the same piece of junk mail sent to two neighbors. The mail is a flyer advertising a long-distance telephone plan. Neighbor A has a plan and is happy with it. She feels put upon and manipulated and says, "I hate all these advertisements trying to get me to buy something!" Neighbor B just moved in and has been researching long-distance phone plans all day. She looks with interest on the ad and says, "How fortuitous to get this today. I wish that every phone company had sent me one."

So, while it is up to you to draw the line between service and exploitation, I believe that the key to staying on the right side is to be sure your value propositions are balanced. If you're willing to give as much value as you expect from your audiences in return, the relationship involves no exploitation.

Defining and Selecting Audiences

To begin to define your audiences, first think about what level of audience segmentation is feasible. You might start by asking,

> "What's the smallest number of audiences that we can divide our users into and still derive tangible business benefit?"

Or you may ask,

> "What audience segments does everybody agree on today?"

Regardless of how simple or ambitious your approach is, count on at least a few iterations of defining and refining audiences before you begin to act on your analysis. Start with whatever segmentation analysis your organization has already done. Expect to add significantly to the current analysis, adding internal and partner audiences and charting how every audience is affected by information.

Get used to the fact that your audiences will change over time. It's not so much that your organization will choose to serve new kinds of people. It's more that your segments will tend to get smaller and smaller as you learn more about the differences within a group or that you may become ready to serve audiences that you were not initially prepared to serve.

It's possible right from the start of your content strategy to drill way down into audience segments and sub segments, producing a very detailed taxonomy. But within the level of segmentation that is possible, what level of segmentation is desirable? If you can, should you create audiences of one? Should you strive to serve each person individually? Supposing that this task is even feasible—that is, that you can put in place the technology to accomplish it—you should still question whether it's desirable. What does having audience segments of one really do for you? Most argue that the benefit lies in increased loyalty and a better sense of service and trust.

Maybe so, but it comes with a cost as well. Can you segment your information so thoroughly that it's different for each person who receives it? Can you create and maintain user profiles that are rich enough to differentiate every user? Do you want to forgo the capability to develop messages with wide appeal and leveragability over a large number of people? All in all it is not a foregone conclusion that you should serve very small or even individual audience segments.

Given that you can arrive at some reasonable segmentation, your next task is to decide which audiences are most important to serve. Here are some guidelines to help you rank your audiences:

- Clearly, the audiences that help you reach important goals are important.
- Audiences that help you meet multiple goals are more important than those that serve only one goal.
- Audiences that are large and can only really be served by some system are more important than those that are small enough to get their information informally or directly from the creator.
- Audiences that are particularly ill-served now are a better choice than those that do not perceive many unfulfilled needs for information.

- Audiences that need information you can readily collect are better than those whose information will be hard to come by.

With all of these factors, and some of your own, you should be able to prioritize audiences. Match audience priority with goal priority and you can create a graded list of who you most need to communicate with to meet the goals of your organization. Combining audiences and goals also gives you a strong base for looking at the information in your organization with a more critical eye.

Audience Attitudes and CM Systems

Learning the attitudes that members of each audience are likely to hold toward your organization and content is an important task for you. From knowledge of attitudes, you can craft the appropriate messaging for each audience. The messaging can be encoded in content types and authoring templates. The following constraints help you understand how the audience may react to your content:

- **Credibility:** According to Aristotle, the perceived credibility of the speaker is more important than what she says in determining whether she's convincing to the audience. How do you establish credibility with this audience? How much credibility do you have now with its members? Have you experienced any particular failures or successes in the past with these people?
- **Current beliefs:** What does this audience already know and believe about the subjects that your content addresses as well as about your organization? Are you reinforcing or trying to change existing attitudes? Do members have any particularly strong positive or negative beliefs that you need to take into account? Ask yourself, "What do people of this ilk trust, respect, like, know, and believe?"
- **Argument:** What do members of this audience consider good arguments and examples? Do they respond more to a logical or an emotional appeal? Must you cite certain sources or quote particular people for them? Can you leverage scenarios or examples that the audience has already heard of?
- **Style:** What tone and presentation style does this audience expect and respond to? Can you advance the expected style to a new level in a way that shows respect for the existing style and innovation (if, that is, the audience responds to innovation)? What vocabulary and usage does the audience expect and respect?
- **Openness to giving data:** How much personal data does this audience want to give? What profile collection methods do members most respect and support? Are they likely to be concerned if you buy information about them from outside sources (direct-marketing companies, for example)?

Once you understand these constraints, you must make them active in your CMS. Here are the basic ways you might do so:

- **Content type structure**. You can choose to encode decisions you make right into the definition of your various types of content. For example, suppose scientists are your audience and that they find a certain set of journals most credible. You can make a citation of at least one of those journals a defined and validated part of the content types that you will produce for them.
- **Metadata**. You can tag your content based on what you know about your audiences. For example, you might tag articles with a style metadata element with values such as: "expert," "professional," "novice" and "general public." Then, depending on what type of audience you have (scientists would likely be experts) you can deliver articles that are written in a style that they will respond to.
- **Personalization rules.** With solid knowledge about your audiences, content type structures and metadata, you can construct rules that automatically rout content to audiences. For example, if you know the field in which a scientist is an expert in, and you have created a "style" metadata field, then you can create a rule that prominently offers them the expert articles in their field via email as soon as they are available.

If officially encoding your audience knowledge is too constraining, you can create written guidelines that tell authors what to do without enforcing it. For example, on the form where authors submit articles for scientists, you can link to the respected journals and suggest that authors reference them. A bit more formally, you can provide templates for the body of the article that lays out how you expect it to be structured but does not enforce that structure.

Bringing it all Together

To have a really audience-centric CMS, it is not enough to have your authors know about and write directly to your customers. You have to schematize audience awareness and turn it into user profiles and personalization rules. You have to think deeply about who your customers are and create a complex picture of how your content relates to them. Then you have to turn that complex picture into simple rules that a CMS can implement and you can maintain.

A CMS does nothing more than collect and deliver content to audiences. To build a CMS that is worth the considerable effort, that delivery had better help your organization in some significant way. A full audience analysis tells you which people are most able to provide this significant help. A full content strategy tells you what information will inspire them to help. A full CMS strategy tells you what system you will need to collect and deliver the strategic content. If you do this early work well, you will have all you need to secure resources and support for your project, and confidently direct its implementation.

It’s no easy task, but don’t worry if you don’t get it right the first time, because you will likely be doing it over and over for the rest of your career.

Note: This article is excerpted from Bob's "Content Management Bible," as well as his upcoming eBook and analysis tool "Crafting Information Strategy," which will be available late fall 2006 at Laughingatthecio.com. More information can also be found at cmbible.com.

Six (Sigma) Reasons to Embrace Enterprise Content Management

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Six Sigma is the formal discipline used to rethink and, if necessary, redesign business operations from a customer-centric position to improve business performance and maximize customer satisfaction. Customer-centric Enterprise Content Management (ECM) is all about customer-facing content, regardless of how the content reaches the customer, be it in print, on the Web, via interactive customer support systems, or over the telephone, where "customer" designates both internal and external recipients of content. The commonality between the two fields of practice is, of course, the customer. Often, however, the perception of Content Management is limited in the corporate consciousness to "managing Web content." Six Sigma provides us with plenty of reasons to seriously consider ECM from a much broader perspective. ECM is no longer primarily a tool to manage Web content or technical documentation, but a key business strategy to enhance and improve the customer experience. This article explores six reasons to implement ECM as a strategic business initiative.

Introduction

In today's world of cutthroat global competition, where increasingly savvy customers have an abundance of high quality products to choose from, corporations are struggling to find, develop, and retain their customers. Customer loyalty is a thing of days gone by; now loyalty must be earned one customer at a time. The one area where companies can distinguish themselves from their competition is in how they organize and execute their customer service. When CEO Bob Galvin and engineer Bill Smith began implementing Six Sigma at Motorola in the mid-80s, they were in effect implementing a suite of management tools and quality improvement strategies, hoping for an effect greater than the sum of the parts. They were successful beyond their wildest expectations, as are many organizations that have subsequently adopted the concepts, methodologies and tools of Six Sigma.

Origin of the term Six Sigma

The term Six Sigma (symbolized as 6σ) originates from a statistical tool, where σ stands for standard deviation, and comes from the notion that that if you have six standard deviations between the mean of a process and the nearest specification limit, you will make practically no items that exceed the specifications. The generally accepted definition of a Six Sigma process is one that produces no more than 3.4 defective parts per million opportunities (DPMO). For example, when applied to a pizza delivery business, this translates into "no more than 3.4 times out of 1 million deliveries is the pizza cold on arrival," or —if we look at a different process within the pizza business—take more than 30 minutes between order and delivery. The external goal: as close to 100% customer satisfaction as is humanly possible (no more than 3.4 unhappy pizza customers per 1,000,000 deliveries). The entire business process is then geared towards satisfying this goal. In practice, organizations that reach 4 or 5 sigma level, which corresponds roughly to 6,200 and 230 DPMO respectively, are considered extremely successful but not yet World Class.

Six Sigma Objective

The objective of Six Sigma, as understood today, is to deliver the highest possible business performance to the *customer* (end-user), with maximum reliability and value to the *customer* (end-user). Other performance improvement methodologies such as Lean Manufacturing and Total Quality Management focus on the internal processes, while in my opinion, Six Sigma adds the dimension of putting the customer first. A key methodology in Six Sigma is DMAIC – Define, Measure, Analyze, Improve, and Control (Verify). Of course, several business processes (in the pizza delivery example) may affect overall customer satisfaction, so each business process must be defined, measured, analyzed, etc., and the organization must determine (weigh) how much each process contributes to overall customer satisfaction, which should be measured constantly. Continuing with our pizza example, questions that can be asked are:

- Is the process to get the pizza to the customer hot and crispy more important than to get it there on time?
- Would a customer still be satisfied if the pizza arrived 3 minutes late, but was hot and crispy as per the guarantee?
- Or is getting it there on time—regardless of the temperature and freshness—the most important process?

Impact on Customer Satisfaction

Let's take a look at information-rich enterprises, with more complex products or services, and multiple channels of delivering service and information to their customers, who all have multiple and diverse needs for information about the products and services. Some examples that come to mind are a utility company, a civic authority, an insurance company, or a regional health authority.

The business processes around the production of gas and electricity, the distribution to residential and commercial customers, metering, billing, network maintenance, etc. probably qualify as "complex." The business processes involved in running a municipality, with products and services ranging from garbage collection to administering business tax incentives to issuing building permits, certainly do!

These types of enterprises can also be greatly impacted by dissatisfied customers. While it may not be easy to change a gas and electric provider after an unsatisfactory experience, people can and do withhold payment, or pressure their government to lower utility rates, or turn to alternative service providers whenever they can. If citizens are unhappy enough with the services City Hall provides, they will move away, removing themselves from the tax base. In short, even organizations that enjoy a virtual monopoly status are increasingly aware of and concerned about customer satisfaction. And they are looking for ways to improve. Six Sigma methodologies can help identify the processes that have the greatest impact on customer satisfaction, and my contention is that these are the communication processes with the customer.

Communication is about the delivery of information – critical processes that cannot tolerate mistakes, and where a lack of communication, or incorrect information negatively impacts customer satisfaction. From a business performance improvement perspective, this is where I discovered the principles of content management, specifically Enterprise Content Management.

Enterprise Content Management is the Tool

If improved communication, more effective communication, and most importantly, delivering information how, when and where the customer needs it is the goal, then ECM is the tool. Like Six Sigma's DMAIC, an ECM project follows an equally structured model: Business Requirements Analysis, Content Analysis, Life Cycle Analysis, Information Design, and Implementation.

Let's look at some of the business reasons that demonstrate how ECM fits in with a Six Sigma-style business performance improvement project:

Reason #1 – Information reaches the customer faster

Creating content takes time, and more so if content is created and stored in multiple places by multiple departments. In the process of implementing an ECM system, all the processes to create, store, retrieve, review, update, and distribute content are reviewed, analyzed, and where necessary, streamlined to accommodate reuse and repurposing of content objects or "chunks." Information documents (or screens) in the traditional sense no longer exist – information is assembled from these content objects as and when needed, in the format best suited to meeting the customer's information need. An immediate and lasting consequence is that the time to update or revise information is dramatically reduced, since only the content objects affected by any change are revised. Instead of reviewing the entire document, only the revised information is checked for accuracy, and updated content immediately replaces the previous version of that information. If the delivery of information is through the company's Web site, a customer has instant access to new information. Combined with distributed printing, or print-on-demand, even print documents can be made available to customers in much shorter production times.

Reason #2 – Improved use of resources to create customer information

By reducing the number of repetitive steps and tasks to maintain and update documents, writers, designers, illustrators, and other staff resources are freed up to actually create new content and develop new methods and vehicles to deliver the content to the customers. Besides providing a challenging and satisfying work environment, staff can concentrate more on innovation and on fine-tuning how information reaches the customer to maximum effect. The long-term results are that the customer is going to experience a company that goes out of its way to provide her with the right information, at the right time, in the right format. The customer will come to believe the company understands her needs, and *actually* wants to satisfy those needs.

Reason #3a – Reducing the cost of producing and delivering information

The traditional methods of getting information to the customer often involve large-scale printing runs, because it's more economical to print 10,000 copies of an instruction sheet than 1,000. The risk, both financial and operational, is that one of two options apply when there is an update to the information sheet: a) the remaining supply, with outdated information, is thrown out, and a new print run is completed for the next 10,000 copies of the updated sheet, or b) the company continues to hand out the outdated sheet, with an errata message on a sticker or on the Web page.

Savings of up to 80% of traditional production costs can be realized by reducing the time involved in creating new information products. Why? Because these new information products are made up of large portions of existing content that do not need to be reviewed. While the company is the main beneficiary of these reductions in production costs, over the longer term, substantial savings may be passed on to the end-user customer. Alternately, the company could maintain budget levels for production, but spend the funds differently, for instance towards new delivery methods, higher personalization of information, and possibly offering much more localized content. Which brings us to the second part of Reason #3:

Reason #3b – Reducing the cost of translating information

In many cases, the cost of translating customer-focused information is so prohibitively expensive that companies provide translations only if they are required to do so by law, or by a regulator, such as the FDA. Even if there is no requirement to do so, service to international customers can be greatly improved if product information can be presented in multiple languages. For example, a health care provider in California serves its customers much better when information is also provided in Spanish – even if there were no legal or regulatory requirement to do so. Likewise, offering information in Mandarin and Cantonese makes perfect business sense in British Columbia, because the population of Vancouver and many surrounding communities approach 35% of Chinese-speaking citizens.

By anticipating the huge savings of translating only those information chunks that change, a company may decide to maintain the production budget as before, but now allocate the anticipated and realized savings towards more languages, more frequent updates, or more personalized information.

Reason #4 – Increased consistency of customer information

One of the more common irritants to customers is when information in one place is different from information in another place. Issues include inconsistent terminology, inaccurate (outdated) information, too much information hiding that snippet of information the customer actually needs, insufficient information to make a decision, or three versions of the information in five different places, each version just slightly different than the next, but enough to completely confuse the customer. There really is only one way to avoid these issues with 100% accuracy, and that is to draw the information from one single source: a database or content management system.

Reason #5 – Review and redesign of customer-critical processes

One of the key effects of Six Sigma projects is the tightly-focused, radical, and sometimes ruthless review of the customer-critical processes. This review and redesign process involves cutting red tape and removing bureaucratic procedures, endless authorization steps, and historical but obsolete steps.

Literally anything that gets in the way of a good customer experience is reviewed, redesigned, adapted, or made obsolete. If we accept that delivering information to the customer is a critical aspect of customer satisfaction, then the review and redesign of content creation and production processes *from a customer-centric perspective* is consistent with Six Sigma principles.

The phases of Content Analysis and Lifecycle Analysis in an ECM project are guaranteed to bring process-related issues that require review and redesign to the fore, paving the way for other processes to change and adapt.

In companies where there may not be sufficient support for a full-blown Six Sigma project, which could take a number of years to complete, a more modest, but no less effective approach to increasing customer satisfaction might be to generate and build executive support for ECM.

Reason #6 – Improved overall quality of customer communication

Being able to access information that is accurate, consistent and useful is a critical component in the customer experience. Knowing that she can completely rely on the information to be helpful, correct, easy to find, easy to use, and "exactly what I need" enhances the customer's sense of competency. In particular for technical products, too often the customer is – unintentionally, to be sure – made to feel inadequate, incompetent, or confused. The more competent the customer feels, the more she feels the product (or service) was tailored with her needs in mind. The more the customer experiences this type of "good fit", the less likely she will be to try a competitor's product (or service).

The more consistent the company is wherever it delivers information to the customer, the more successful the company will be in providing a unique, personalized experience to the customer. The positive experience of making the customer feel that "she is your only customer" translates into a relationship with mutual benefit. The customer feels valued, validated and appreciated. In return, the company gets not only a loyal customer but also an advocate and enthusiastic promoter who will actively recommend the company's products and services to others.

Summary

While the terminology, methodologies, and processes are different when comparing Six Sigma to Enterprise Content Management, the principles and concepts are the same:

- focusing on the customer (end-user)
- reducing waste and inefficiencies
- saving costs, time, and resources
- improving quality

Given that many executive teams are at the very least already vaguely familiar with the concepts of Six Sigma, introducing the idea of a Unified Content Strategy, and gathering support and a budget to prepare for and implement an ECM system may be less daunting when presented to management using Six Sigma concepts and terms.

Implementing an ECM System is a—relatively speaking—low-cost, quick return method of realizing one of Six Sigma's explicit goals: to deliver the highest possible business performance to the customer (end-user), with maximum reliability and value to the customer (end-user).

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CM And Customers, Managing Relationships

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The typical Web redesign results in a better looking more usable site where your information resources are easier to find. But so what? The typical Content Management System (CMS) implementation results in a more efficient process and better organized information. But so what? What does all that really get you? The sad fact is that very few people who install a CMS or redesign a site look beyond these simple justifications to the real reasons why they should organize information and create publications. It's not that these justifications are not important; it's that they are enablers of the more important justifications for managing and delivering content. The ultimate reason your organization manages information is the same reason your organization does any activity—to advance toward its goals. As obvious as this conclusion is, it amazes me how few CM and Web initiatives really address it. In this article, I'll outline one simple, powerful way you can go beyond the immediate efficiency and usability justifications to tie your CM inextricably to the foundations of your organization.

The approach is quite easy to state. Any interaction between an organization and an individual (or a group of people) should benefit the individual and the organization. It's a simple exchange of value. The exchange of money for product or service happens all the time. But the exchange of value is not limited to money. It can happen in any medium including content.

> *Our organization gives you the content you want and in return you do something for us.*

The simplest example is the exchange of money for information. Many news sites now say "You pay for a subscription and we will give you premium information." But more importantly, news sites also say "You pay attention to us and think more favorably of us and we will give you premium access to news and events." The user wants to know and the organization wants to be loved.

The exchange of value to simultaneously satisfy the needs of both parties is the fundamental driver of your organization's success. It can be the basis for how you design your CMS and all the sites and other publications it produces. If you can figure out who your audiences are and what they want from you and also figure out what you want from them, you can overlay the two based on the kinds of information that serve both purposes. Your sites can link content in a way that brings the user and the organization closer to their goals. Let's take the process one step at a time.

Create lifecycles. Most commercial organizations have some notion of what they want their customers to do. Often calling it a "lifecycle," the organization charts the mindsets that a potential consumer will generally move through from the first awareness of a product or service to their eventual purchase. Regardless of the kind of organization you are in or who your audiences are, you can do the same. For example, a college might have as its goal the eventual enrollment of new students. They might reason that a potential student progresses from awareness of the college, to putting the college on a short list, to committing to the application process and finally to committing to enroll.

Link lifecycles to content. You can chart the key content types and items that indicate that a user is in a particular stage of your cycle. For example, the college might decide that a potential student is in the "short-list" phase when she is looking at detailed departmental requirements. You can also decide what users might do to enter the state, dwell in the state, retreat to an earlier state or advance to a later state. For example the student might show that she has entered this stage by visiting an application checklist page. They might show that they are remaining in the "short-list" stage by coming back to the site multiple times per week and dwelling on course and housing information. As I'll discuss later, it is far less important that the college be right about these assumptions than that they get used to making and testing such assumptions.

Figure out what your audiences want. Use every available source of information to know what your audiences want from you. Read your server logs to figure out what they actually do on your site. Interview them. Decide what tasks and processes they most want you to support. Decide for each audience what content is central to their feeling that they are progressing toward their goal. What content do they enter your site from, what content do they exit from? At the same time try to characterize your audiences using personas, scenarios, use cases or whatever other user analysis tools you can muster. For each audience, prioritize your information from their perspective and chart their information-seeking strategies.

Overlay your lifecycles and their strategies. Find the overlaps between the content your audiences see as key to success and the content that indicates motion through your lifecycles. Are there key content types or particular items that appear on both the organization-centric and the user-centric lists? Are there ways of framing user-key content such that it motivates users to the next lifecycle stage? For example, potential students might really need to calculate the total cost of attending (TCA) in order to decide where they can afford to go to school. The college might feel that a student who is ready to chart expenses can be considered at the end of the "short-list" stage and almost ready to enter the 'apply" stage. In response, the college might focus heavily on drawing potential students who are looking at detailed course offerings (those that are midstream in the "short-list" stage) to content that allows them to easily and confidently calculate TCA. From the TCA content it would be foolish for the college to equally present links back to the courses with links forward to the "apply" stage entry content. Instead they should heavily emphasize forward links with both visual cues and incentives to click.

By following these simple steps, your organization can:

- Know specifically what their site should accomplish.
- Develop a strong idea of forward and reverse movement through your site for each audience type.
- Develop clear precise instructions about how to link content for maximum effect.
- Prioritize content types and focus most heavily on those that drive both user and organizational success. Priority content types can get more resources (better editorial processes, better tagging, deeper coverage, and so on).
- Organize content based on its purpose to the organization, For example, "entry" content helps people make the transition to a new lifecycle stage. Depth content helps people solidify their commitment to a stage, and exit content points them to the next stage.
- Develop specific points in the site where they can measure success. For example, the college might use the number of people who come to the TCA page as a measure of how many or few people are getting to the "short-list" stage.

Define the best CMS and Web site. Most importantly, this attitude can drive all your CMS and site design efforts. The best CMS is not the one that most efficiently organizes the most content. Efficiently organizing a lot of content is a given. The best CMS allows you to most effectively identify and assign key content types and items, segment your audiences and link them to the content they should receive (and not just on the Web). The best Web site is not the one that is most useable or beautiful. Those too are now a given. The best Web site is one that most effectively advances a user's goals while simultaneously advancing the goals of the organization that created it.

The best CMS and Web site has one more essential element. As I said earlier, it matters much less whether your assumptions about audiences, lifecycles and content types are correct and more that you begin to make such assumptions. This is because no matter how long and hard you work, you will never know your users and information well enough to fully anticipate how to connect them. Furthermore, even if you could figure it all out, it would change by the time you could implement it. So, the best CMS and Web site supports not only the linking of audiences with information, but the continual evolution of your understanding of how to do so. It also supports your ability to experiment with novel approaches to moving users and helps you track the results.

For example, the college might decide to present half of the potential students with form A of the TCA pages, and the other half with form B. By controlled variation of the differences between A and B they can continually evolve their ability to move users from "short-list" pages to the "apply" pages. They might try varying the position of the links to depth content relative to exit content, and they might play with wording. They might introduce links to two different kinds of exit content. Of course, they will do many experiments that I or they could never anticipate from a distance.

Conclusion

So what will you do when the next Web redesign or CMS purchase comes up? Will you keep company with the same old justifications and design paradigms of efficiency and usability? Or will you revolutionize the way you argue for resources and design your systems and sites?

Just as importantly, what will you do today to evolutionize your system and sites? What is keeping you from choosing two pages that seem to mark a lifecycle transition for at least one audience? How hard would it be to try three different forms of the first page and see which yields more links across the boundary? How excited would you be if one of them clearly increased the crossings? How hard would it be to continue the experiment extending it to other pages, slowly beginning to "instrument" your site and quickly beginning to argue for new content, features, and systems based on hard data about what works for the user as well as for your organization?

Building a Content Framework

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A content framework is a library of content types and metadata along with detailed guidelines for how to use the framework to create specific customer experiences. A content framework provides the underlying concepts, best practices, guidelines and structure to enable you to rapidly design, build, test and deliver an effective customer-centric content experience. This article provides an overview of the components of a content framework.

The development and delivery of content can be haphazard and disjointed which usually results in an inconsistent experience that does nothing to build customer loyalty and solidify their experience with the organization. You need to develop a framework that can be used as the guide for all your content delivery that provides a consistent, repeatable structure for success.

A content framework consists of:

- Customer needs and task definition
- Relationship management lifecycle (RML)
- Architecture to support the RML
  - Content matrix
  - Structured content types
  - Metadata

Know your customer

Central to your strategy is your knowledge of your customers. Look at all the research you have (for example, Web stats, customer purchase patterns, customer support, marketing strategies). If you don't have existing research, find ways in which you can collect information (for example, focus groups, user group conferences, customer support, marketing staff, task analysis). It is only when you have a solid understanding of your customer and their needs and tasks that you can begin to focus your delivery and your content management strategy on customer requirements.

Relationship management lifecycle

The term customer lifecycle is becoming familiar to organizations involved in customer relationship management initiatives, Web content initiatives, and marketing initiatives. A customer lifecycle defines the progression of steps a customer goes through with your product or service.

For example, a simple lifecycle could include:

- Explore
- Buy
- Use
- Maintain

There are identifiable customer behaviors at each stage in the lifecycle. For example, in the explore phase a typical customer might want to:

- Find out what products are available
- Compare product options
- Get an understanding of the features

A relationship management lifecycle builds on the basic customer lifecycle, but defines:

- The customer tasks at each stage of the lifecycle
- Content types that help the customer accomplish the tasks
- The directions the customer could move in
- Desired directions for customer movement
- Ways in which you can deepen the customer relationship through information selection and sharing

When we view a standard customer lifecycle, we view customers as an anonymous group, but when we build a relationship management lifecycle, we view our customers as individuals. At the simplest level, we provide an optimized experience for the customer and at the deepest level, we give each individual the opportunity to tell us something about what they want, and we give back a better more in-depth set of information and experiences. This process builds value and increases satisfaction.

The underlying architecture

The architecture that supports your relationship management lifecycle and content management strategy includes:

- Content matrix
- Structured content types
- Metadata

Content matrix

Content types do not exist in isolation; you need to provide a collection or matrix of content types for each phase in the lifecycle. Each content type is related to another or many others and helps to create a complete integrated suite of information for the customer.

Integral to the matrix is an understanding of the content flow. The content flow identifies how a customer satisfies their need for information and identifies the organization's desire to move the customer in a particular direction.

The benefits of a content matrix include:

- Comprehensive content requirements (no gaps)
- Complete understanding of how customers can use the information
- Identification of desired customer paths through the content
- Plan-of-action for content creation and positioning

Structured content types

At each and every point in the relationship management lifecycle you provide content to assist the customer in reaching their goals and accomplishing their tasks. This content should be categorized into common, consistent identifiable content types. For example:

- Product overview
- Product feature(s)
- Product comparisons
- Testimonials
- Case study

Content types should be structured to ensure consistent creation, delivery and reuse. A structured content type consists of a group of required and optional content components that combine to form the structure of a piece of content such as a product overview or customer testimonial.

The benefits of structured content types include:

- Increased opportunities for content reuse
- More consistent messaging
- Predictable structure to support rules-based personalization
- Templated authoring
- Reduced cost of content creation
- Reduced localization costs

Metadata

Although metadata is typically required to optimize search and retrieval, it provides a much broader role then that—metadata is integral to the customer relationship. Metadata makes it possible to identify customer areas of interest, deliver personalized content, and identify relationship critical content.

Metadata plays many roles in supporting the customer experience through:

- Search
- Navigation
- Personalization and relationship management
- Web site traffic reporting

And metadata supports content authoring and content management through:

- Content Reuse
- Content retrieval and storage
- Workflow

Summary

A content framework plays a critical role in customer-centric content management. It ensures that you have a clear, repeatable structure for your content that ensures you meet customer needs, support organizational goals, and optimize your content management strategy.

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