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Feature Article

Making the Case for Content Management

Knowing intuitively that we can benefit from a content management system is not enough to convince management to open their wallets. Assembling effective metrics is one part of the equation, along with creating a compelling story and garnering executive support. We need to demonstrate the benefits and make a business case that justifies the cost and effort, if not for our management, then for ourselves.

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Case Study

How Guidant Corporation Gained Support for their Content Management Project

Guidant, located in St. Paul, Minnesota, is a world leader in the design and development of cardiovascular medical products. In a highly regulated environment, Guidant provides physicians with leading-edge technologies for improved patient management and clinical outcomes. The Technical Communications group produces product documentation for Guidant products, such as physician's manuals, operator's manuals, and technical manuals. Product documentation must meet stringent regulatory requirements. Because of issues in authoring and reviewing content, Guidant's Technical Communications group identified a need to move to content management.

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Tools and Technology

Due Diligence in Selecting Technology for CM

"How do I convince my management to spend money on CM tools?" That's a common question that people ask when we're talking about business cases. Part of the answer lies with the process of selecting tools and being able to show "due diligence".

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The Elusive Business Case

An idea is only as good as your ability to make a case for it. Unless you can convince others to adopt it, it remains an idea. To get your idea out of “your head” and implemented in your organization, you have to convince others that it's a good idea, why it's a good idea, what it'll do for them, what it will cost, and more importantly, what they'll get in return. But, moving an idea from your head into others' heads is often the reason why many good ideas never get implemented. You need to be able to make a business case for it, a elusive skill for many of us! However, there is help. In this issue of *The Rockley Report* we describe how to make a business case for a content management implementation. Rahel Bailie and Nina Junco open the issue with their article on making a business case. They go beyond the dollars and cents, which, while important, need to translated into a story that management can understand.

Other articles focus on various aspects of making a business case:

- In “Creating a Winning ROI, Ann Rockley provides guidelines for determining ROI as part of your business case, emphasizing that costs must be realistic so your ROI is accurate and believable
- A business case should also consider that implementing content management affects people. In “Change Management: Dealing with Emotions”, Philippe Robitaille discusses the different ways in which people may react to content management and suggests strategies for coping with them. Understanding different emotional reactions can help you to build change management into your business case.
- In our case study, Lori Kegel, Manager and Project Sponsor for Guidant Technical Communications, tells us how they gained support for their content management project.

We also provide you with a number of tips for creating a business case, as well as some advice on how to show “due diligence” to support your content management technology selection. In this installment of *In the News*, you'll find links to web sites where you can learn about the hurdles preventing some organizations from adopting content management, what the common business drivers are, and how to determine total cost of implementation.

We welcome your feedback. Please send comments, as well as suggestions for stories in future issues to kostur@rockley.com. Our Call for Submissions describes the kind of stories we're looking for and how you can submit articles for publication in future issues.

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Feature Article

Making the Case for Content Management

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Knowing intuitively that we can benefit from a content management system is not enough to convince management to open their wallets. Assembling effective metrics is one part of the equation, along with creating a compelling story and garnering executive support. We need to demonstrate the benefits and make a business case that justifies the cost and effort, if not for our management, then for ourselves.

What brings us to content management is inevitably a pain point in our organization—a need to fix a business problem or forestall a potential problem. We may be drowning in information, going through a corporate restructuring that leaves us doing more with less, adapting to an accelerated business model, or participating in a risk management assessment that includes accuracy metrics for user support material. No matter what the trigger might be, we are usually responding to a need within our department or organization to find a better way to manage corporate content.

Aligning Content Management with Corporate Business Drivers

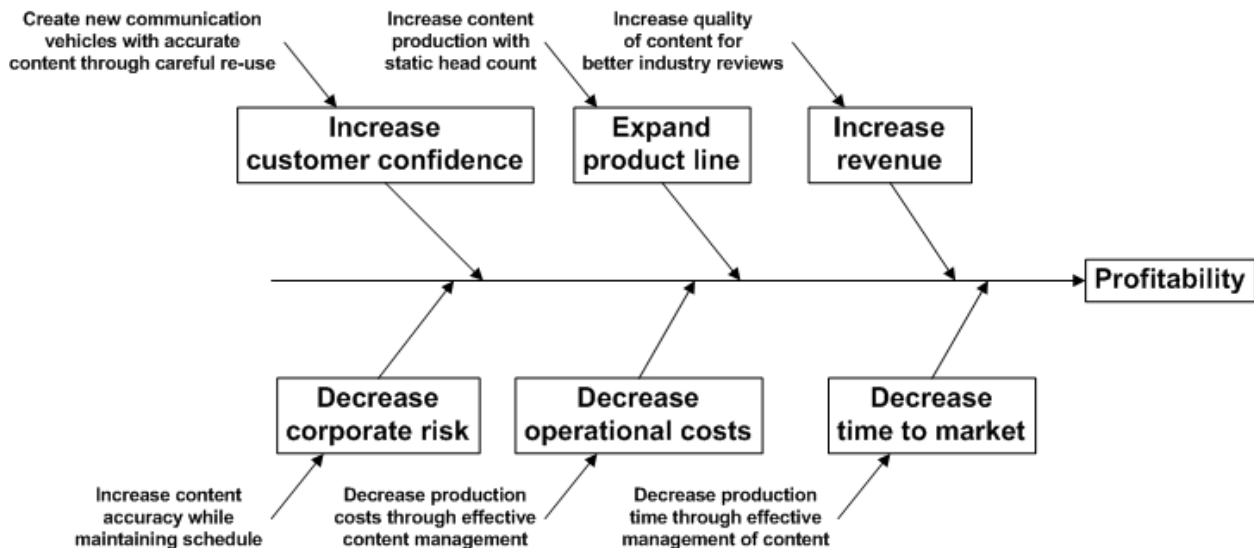
Understanding corporate business drivers is an important factor in making the case for content management. The business logic is relatively straightforward. Organizations are in the business of making a profit. Organizations value initiatives that contribute to profitability. Organizations support what they

value. Organizations fund projects they support. It follows, then, that to make the case to fund a content management project, we need to garner corporate support on an initiative that management recognizes as contributing, ultimately, to the profitability of the organization.

Our challenge, then, becomes to find the business drivers that resonate with management. The business drivers can be quite diverse, from increasing market share to reducing time to market, from decreasing operating costs to increasing perceived value, from mitigating legal liability to regulatory compliance. Once we determine what the business drivers are within our organizations, we can propose content management to align with the other initiatives are on the corporate roadmap.

How convincing we are depends on the way we express the need for content management in relation to those other initiatives. Figure 1 illustrates ways to

Figure 1. Demonstrating how CMS supports business drivers



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demonstrate how content management supports business drivers within our organizations.

Executives Need Metrics

Articulating how the investment in content management supports the particular business drivers of our organization is one part of the equation. The second part is supporting our position with data that predicts how content management improves profitability.

The basic measurements of value fall into two categories:

- Return on investment (ROI), the difference between the cost of the investment activity and the expected measurable change, which is expected to result in an increase in revenue.
- Internal rate of return (IRR), the difference between the cost of the investment activity and the expected measurable change, which is expected to result in a decrease in costs.

For example, investing in content management could have two different effects, which would be expressed in different ways. In an ROI scenario, the content management system might allow the same number of staff to create and maintain a new communication channel that increases sales. In an IRR scenario, the same investment may not affect sales, but allows a department to create the same amount of material with less staff.

By providing metrics to management, we provide them with the ammunition needed to make an informed decision. To paraphrase the vice-president of a company eager to implement a content management system: "The executive team had totally bought in from the first presentation, but until the analysis phase was done and the consultant had run the numbers, there was no way we could go forward until we'd done our due diligence." The final presentation was only a few slides long, and the focus was on comparing end value to the company. Shown were actual costs, projections without content management, then the same projections with content management, plus implementation costs. What was demonstrated, in this particular case, was that the time and cost to meet the business requirements would be cut by over sixty percent, *after* the cost of implementing the content management system—a very strong rationale for going forward.

Some of the metrics needed to make our case can be determined on our own, but there is a strong case for collaborating with management. First, managers must make calculations on a regular basis for all sorts of budgetary and planning purposes. They may have ready access to existing metrics, or offer advice on how to present metrics for management credibility. As well, the process of involving management in preparing metrics also prepares them for our presentation. By the time the presentation date comes around, the material will be familiar to them, and they can help interpret the metrics to other audience members.

While there is no definitive measurement that will convince management to act, making our metrics meaningful to our audiences will increase our chances of success. [1]

Creating a Compelling Story

Getting management to understand exactly what we want to accomplish, and why, is an important aspect of getting their buy-in for a content management project. The power behind abstract concepts is limited by the vocabulary of the audience. Until management really understands the concepts behind terms such as content reuse or unified content strategy, they will have a hard time supporting the project, even with a sound business case.

It's not enough to run through the concepts once. Communication theory tells us that to accommodate the various ways our audience members absorb information, we need to repeat our message seven times in seven different ways. Sometimes, the understanding of content management is a tenuous one at best. While we may not have seven opportunities to make our case, we can certainly use multiple story-telling techniques to get our message across.

For visual learners, we can reinforce the concepts we want to demonstrate by using the tools at hand: representative content management software, online help software, or a static mock-up animated using presentation software. The concepts will be understood by interpreting how the workflow takes place through a software interface. For auditory learners, using story-telling techniques is a way of reinforcing how content management works. Here, the concepts are presented in the context of the tasks in the production process.

Combining these techniques will engage management, capture the interest of the decision-makers, and help

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them understand both the business problem and the proposed solution.

Getting Corporate Support

When faced with the opportunity to make the case for a content management system in one organization, we combined visual and auditory presentation techniques to ensure we reached both visual and auditory learners within the management team. Our presentation demonstrated the concept of content management by using a series of screen shots. After mocking up a small section of several documents that contained a common text paragraph, we walked the management team through the steps of editing the document, showing them how changes to a chunk of content were reflected throughout several documents in which that chunk of content would normally be included. Using two storytelling genres, the Slice-of-Life (showing a streamlined editing cycle) and Utopian Tale (showing the ease of re-using content), we brought the presentation to life and helped management understand the implications for their organization.

During the presentation, we introduced management to concepts of content management and the related vocabulary, helping them to envision how content management could improve the way they did business. By the end of the meeting, they were comfortable articulating the principles of content management and were enthused about the possibilities. Later, one executive confessed that one of the participants had been convinced to take a position that he'd not wanted because responsibilities included maintenance of a large and messy document set. After our presentation, the fellow could see the light at the end of the tunnel, so we added staff as one of the benefits of implementing a content management system.

Making the Business Case

Expressed linearly, the steps to making a business case are to:

- Assess the situation
- Formulate a problem statement
- Identify process improvements that support business opportunities
- Make a convincing proposal

In the example that follows, we walk through these steps to illustrate how we made the case for implementation of a content management system.

Assess the Situation

Our first step was to assess the current content creation process to determine what was working and where we could identify room for improvement. At the end of the assessment, we found several areas that needed to be addressed—and could be addressed—by a content management system.

- **Content silos:** Lack of shared information resulted in creating and recreating the same content for different purposes, sometimes with complete duplication of a single document by multiple authors.
- **Communication gaps:** Authors were unaware that content was available elsewhere within the organization. This led to the same content being created multiple times.
- **Lack of standards:** The content being created was often inconsistent in tone and format, making reuse awkward and content tracking a burden. Illustrations were tracked through an awkward spreadsheet, while rewritten text was not tracked at all.
- **Lack of audit trail:** Reviewer edits and subject matter expert sign-offs were given in many formats, and their collection and storage could not be tracked with the desired effectiveness.
- **Over-engineered processes:** In the resource-intensive processes, writers created content, which was reviewed by multiple subject matter experts and returned to the writers for editing. The linear reviews meant that writers incorporated sometimes contradictory edits, resulting in multiple editing cycles.

Formulate a problem statement

After assessing the situation in a frank and honest way, we clarified the concerns and were able to create a problem statement that we articulated in the language of our audience. Using the language of our audience was an important part of making the business case, because the less energy they spent “translating,” the more energy they could spend concentrating on the message.[2] We crafted the following problem statement:

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A problem in the production of technical communication material is that inefficient business processes do not support effective content development. This negatively affects external and internal customers, the impact of which affects perceived market value. The challenge is to provide clear, complete, concise, and correct documentation in a timely manner that supports current and future customer needs, complements the corporate branding message, and offers greater flexibility in meeting needs of the various audiences. A successful solution would increase the company's ability to produce and maintain product documentation at static staffing levels, develop products with less labor and production expense, and provide a rapid-response vehicle in changing market conditions.

Identify process improvements to support business opportunities

The team determined that the successful implementation of a content management system would provide a way to advance the corporate goals of introducing new products into the market with enough lead time to maintain the company as industry leaders, gaining market share by expanding to new offshore markets, promoting brand loyalty, and earning a substantial return on investment.

To do this, the team identified several areas where improved processes would be seen as advantageous:

- Efficient content management allows source-language documentation to be ready at the time of product release, with language variants available soon afterward, entering markets as quickly as possible.
- Creating a definitive source for content ensures that users receive the most current, accurate, and applicable piece of approved content, maintaining leadership in the market.
- A clear audit trail supports regulatory requirements, reducing legal liability in the case of product misuse.
- Reuse of content across the documentation and training materials decreases production time, providing support for rapid product development.
- Clear, consistent, and attractive presentation can be produced with existing resources, promoting brand loyalty at a lower cost.

- Content reuse provides a searchable information base for the customer support group, allowing them improve customer service response times.

Grasping the need for a content management system left us to propose a methodology for the project. Of the various options considered, the Rockley method [3] was chosen as a comprehensive process that could be tailored to the organization's needs.

Anticipating a management concern that the process and implementation knowledge might be lost upon project completion, we adapted the methodology to a coach-mentor model, intended to offer support and guidance, and transfer the knowledge to staff as the project progressed. The proposal needed to be clear that the consultant would be involved in the project half-time, for two weeks each month. The consultant's role would be to help staff begin each leg of the roadmap, teaching them how to carry out each task within the context of the larger project. Upon the consultant's return, the deliverables would be checked and, assuming success, the next task begun.

Armed with this information as a framework for additional information gathering, we used the main points as an outline for the proposal.

Make a convincing proposal

The purpose of the proposal is to demonstrate the value of moving to a content management system and to provide justification to move the project from informal to official status. Our proposal outlined a plan to implement a content management system that would manage information for end users, a network of dealers, installation and maintenance technicians, and internal audiences such as customer support. The information was to be delivered in various formats, including print and web-delivered documentation, training material, a digital image library, and a knowledge base for internal use.

The proposal followed the format described here, with sections to cover the assessment, problem statement, process improvements, business opportunities, and, most importantly, a recommendation on whether to proceed and how. While the metrics were available as supporting material, management was given summaries only during the presentation, a high-level view of the situation. While the printed presentation took a relatively formal tone, the oral presentation was supplemented with evocative narra-

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tive meant to engage the audience and punctuate the message.

Summary

Making the business case for content management takes time and effort, and its impact cannot be minimized. Aligning the rationale for a content management system with the organization's business drivers helps management understand the value proposition of the project. Calculating the metrics that show return on investment or internal rate of return allows us to make our case for content management with confidence, and using an engaging presentation style helps the audience connect with the material. By the end of the presentation, management should be able to make an informed decision when asked to support the project.

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- [1] Phelps, Bob. 2004. *Smart Business Metrics: Measure What Really Counts & Manage What Makes the Difference*. London: Financial Times Management.
- [2] Cole, Kris. 2002. *Crystal Clear Communication: Skills for Understanding and Being Understood*. Frenchs Forest NSW: Pearson Education Australia.
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Best Practices

Creating a Winning ROI

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No business case is complete without a section on return on investment. You need to determine how your costs for implementing content management can be offset with savings or increased revenue. And you need to ensure that your ROI is accurate and believable. This article provides guidelines for creating a winning ROI.

Identifying current costs

As indicated in *Identifying the Components of your ROI, April 2004, Volume 1, Issue 1, The Rockley Report* you need to begin the process of identifying ROI by analyzing your issues. Each of the issues you identify are potential savings areas to use in the calculation of your ROI. *Reuse: A Substantial Factor in Determining ROI for Content Management* (http://www.dclab.com/ann_rockley_roi.asp) provides guidelines for how and where to look for costs in your organization. Chapter three of our book *Managing Enterprise Content: A Unified Content Strategy* provides a detailed description of how to calculate ROI.

Key savings in calculating ROI

The two most important savings to consider in your ROI are reuse and translation. We have found that these can be your greatest area of savings, and in the case of translation can be your largest area of direct dollar savings.

Reuse

Your percentage of reuse can be used to calculate productivity savings and translation savings. Ensure that you have a solid number for your percentage of reuse, don't underestimate it, but don't over inflate it either. If you want to be accurate in your percentage of reuse do a programmatic analysis of a representative example of your content to determine identical and similar reuse. Using a number that can be supported by actual analysis rather than a "guesstimate" is more effective.

Once you have your percentage of reuse use it to calculate the percentage of:

- translation savings (less content to translate)
- productivity savings (less time to create and review content)

Translation

As indicated earlier, this could be your biggest area of savings. Depending upon how many languages you translate your content into, we have found that you can see an ROI in a year to 18 months. The cost savings can be found in the following areas:

- Reuse
The average cost of translation is 24 cents/word. Therefore if you reduce the number of words to be translated through reuse your translation costs go down dramatically.
- Post translation publishing
30–50% of your total cost of translation is related to post translation publishing (e.g., reformatting the content in the medium you plan to deliver it in). When you move to XML or another structured format that separates format from content you can virtually eliminate these costs.
- Element based translation
Typically an organization sends out large sections of their content and sometimes whole documents for translation. Not all content needs to be translated in a large sections. You will be charged for the costs of comparing the current content to the previously translated content to determine where translation is required. The less content you send or the more specifically marked that content is the less costs you will incur. With content management you need only send the elements that have changed and you can automatically indicate where that change has occurred. Note: Translators translate content in context so you will need to send a larger grouping of information for context but you can indicate only those elements to be translated.

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- Project management

Project management costs for translation are typically very high with project managers having to manually track content going out to and returning from translation. With the use of an effective content management system that provides a strong translation workflow you can reduce these costs significantly. Estimate a minimum of 25% reduction in project management costs, potentially higher depending upon the number of languages you translate and the complexity of your process.

Revenue generation vs. productivity gains

Typically productivity gains are used to show savings in the time to create, maintain, and deliver content. These productivity gains are calculated using reuse. However, in these days of downsizing and outsourcing, showing productivity gains can produce an undesirable result from your perspective. It is much more effective to show the productivity gains as revenue generation and new resources.

- Revenue generation

Most of the resources used to review materials are subject matter experts whose “real” job is not to review content. Reuse can be used to show how you can reduce the time they spend reviewing content and use that time to produce more revenue for the company instead. For example:

- Make more sales
- Support more customers
- Develop more software/hardware
- Service more product

The same holds true for authors who are subject matter experts rather than full-time authors.

Determine the figure your organization uses for revenue generation and calculate how much additional revenue could be generated if the time taken to review/create content were reduced.

- New resources

Rather than showing that reuse reduces the amount of work an author must perform and consequently increase their productivity, use those productivity gains to show how this could result in “X” number of new resources. There are never enough resources to do all the work that is

required. Reuse frees up resources so it is like getting new resources at no additional cost to the organization.

Other savings areas

Reuse and translation are large areas of savings for your organization, but they may not be the biggest or most important areas for you to focus on with your ROI. What are the “hot buttons” in your organization and how can content management address those issues (e.g., compliance and risk)? Including savings from these areas may be the deciding factor in your ROI.

Multi-year ROI

Don't calculate your ROI based on one year. It is unrealistic to expect that you will achieve your full ROI in the first year for the following reasons:

- Re-engineering of content/migration

You will need to re-engineer or migrate your content to the new structure. This activity takes time.

- Translation

You have a lot of content and consequently a lot of existing translation. It will take time before reuse affects all of your content.

- Change management

You will find that it takes time to get all of your areas working with the new methodologies and tools.

You will realize savings in your first year, you just won't realize all the anticipated savings in the first year. Determine what percentage of content will be affected in the first year and what in the subsequent years. We typically use three years for our ROI. The first year, costs will exceed savings, but that will start to change in the second year and by the third year you should have realized all your savings.

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Realistic costs

While you may have calculated your costs very carefully you will probably find that you still didn't estimate enough. Nobody likes cost over-runs but they are a reality because you can never anticipate everything, particularly in the area of customization. We recommend that you increase your project costs by a minimum of 15% to ensure that you are adequately covered.

Summary

Armed with a clear idea of your cost savings, a positive reflection of anticipated resource savings and realistic costs will position you with a winning return on investment. Take the time to really scrutinize your numbers to portray a realistic solid return on investment.

Tools and Technology

Due Diligence in Selecting Technology for CM

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“How do I convince my management to spend money on CM tools?” That's a common question that people ask when we're talking about business cases. Part of the answer lies with the process of selecting tools and being able to show “due diligence”.

I love the term, “due diligence”. I first heard it when I worked for a software company whose growth strategy revolved around the acquisition of complimentary software companies. The term was used to describe the effort made by our executives to ensure they knew exactly what they were buying. But what is due diligence? Merriam-Websters' online dictionary [1] gives the following definitions for the two parts of the term:

due: required or expected in the prescribed, normal, or logical course of events

diligence: the attention and care legally expected or required of a person (as a party to a contract)

Not a lot of help and a little redundant. The following definition from La Piana Associates, management consultants for non-profit and similar ventures, is pretty clear:

What is due diligence? Due diligence is the process by which confidential legal and financial information is exchanged, reviewed and appraised by the parties before a merger (or other legally binding) agreement is finalized. The essence of the due diligence process is an effort to make everyone on the negotiation committee, and by extension everyone on the board, as aware as a prudent board member can be of any liabilities the other party may bring to the table. The desire is to create a “no surprises” situation so that when, say, six months after a merger's effective date, a balloon payment on a loan must be met, no one can claim that the matter was hidden. [2]

“No surprises” is good, but this definition is specific to acquisitions and mergers. A more generic description comes from the Corpa Group, a private investigation firm:

Due Diligence is really a form of risk management most commonly known as doing your homework before you invest. [3]

For selecting technology, you need to exercise due diligence in identifying the candidate software and then demonstrate (show) your due diligence to convince your management that you have made the right decision, with no surprises!! The nastiest surprise, and the one you most want to avoid, is when the technology doesn't really do what you want.

Know what you need the product to do

You can subtitle this “Focus on functionality.” To put it simply, your primary goal in selecting technology is to understand the functionality that you need in a content management system and then find which systems can deliver it. Lots of companies go into their tool selection processes without a good understanding of what they need and are then “seduced” by really cool functionality that really doesn't help them. For example, personalization is a popular buzzword for web content right now, so web CM vendors who say they offer personalization functions get lots of attention. But many companies don't really know how they need or want to present personalization to their customers.

The correct sequence for matching functionality needs against tools is this:

- Develop a vision of how you need to create, manage, manipulate, translate, and deliver content
- Determine the functionality that you absolutely need to deliver the minimal accepted subset of that vision
- Determine the functionality that would help you to deliver beyond the minimal subset (these are the should have/nice to have)

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- Create a functional specification that documents the needed and desired functionality
- Begin comparing the delivered (promised?) functionality of the potential solutions against your needs to establish candidates
- Short list the most likely candidates and dig into the details; that is, confirm the functionality delivered against your needs
- Select the best candidate and push for a pilot

In addition to separating the mandatory functionality from the nice-to-haves, you can apply a weighting factor to desired functionality to help with the decision. It will help you to rank the value of the nice-to-haves. If you apply a numerical value to functionality, you can add up the available functionality in a product and calculate a score.

You can also provide scoring to mandatory functionality, so that out-of-the-box is given a higher score than extensions.

Include IT

IT departments have often been accused of taking over technology projects and focusing on the technology (toys) and ignoring business requirements. This may or may not be your experience. Either way, include IT in your selection process. (For some companies, this is mandatory.) They can help you in a number of different ways.

- They've probably been involved in software selection projects before, and can therefore help you through the process. This is invaluable if you are participating in tools evaluations for the first time.
- They can help identify any required standards and technical requirements for your environment, such as database, language (coding), hardware, network.
- They can help identify any support requirements that may be associated with the tool.
- They can help set up tests and evaluations.

Know what is out of the box

Do not settle for simple "Yup, we can do that" answers from vendors. Understand the functionality that is delivered "out of the box" and what requires customization or extensions to be built into the product. Many products offer a basic functionality set as out-of-the-box functionality, but then provide programming interfaces that can be used to extend that

functionality to meet specific requirements. So make sure when you ask vendors if their product delivers certain functionality, or can accomplish some specific sort of task, that they tell you whether it is default behavior, configured behavior, or behavior that must be coded in as extensions.

Get customized demos

If your email inbox is anything like mine, you probably receive lots of invitations to attend webinars for CM products. They can be very educational. They can also be misleading. Remember that the vendors are using these forums to showcase the key features of their products. The vendors focus on the features/functionality that show their product in the best light and which will be attractive to the widest prospect base. But, everyone has different needs in content management. When you are researching systems, ask the vendors for a custom demonstration, one that shows the system do what you want it to do. Most vendors are quite willing to set up web sessions and demonstrate their system. Also, ask them if it is possible for them to demonstrate using your content. If they're hungry enough and it's not too difficult or time-consuming to do it, they will. You might go so far as to create scenarios typical of your authoring, publishing, reuse, etc. processes and have vendors demonstrate that scenario, using real content.

Get references

Don't hesitate to ask the vendors for references to other companies who are using the product to solve similar problems. Some of the best information that you can get about products will come from the people who are already using it.

In addition to sharing their product knowledge, references can also tell you about the vendors. Ask them about their experiences with the vendor. Have specific questions prepared for the references, ask all references the same questions, and compare the answers. Ask questions like: Have they been responsive to needs? Has support been effective? Quickly offered or slow to arrive? Ask direct questions like, "What issues did you encounter?" "How long did it take them to respond to issues?."

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Understand that “easy to use” is subjective

What is easy to use for one writer or one company can be difficult to use for others. If a reference says that they found the software easy to use, make sure you know “when” the software was easy to use. Was it easy to use right away? Or was it easy to use after the training was complete. Or, was it easy to use after extensive modifications to the interface Find out if their users have a similar technological sophistication to your own. Find out how they are using the system.

Push for a pilot

The CM software market is a buyer's market right now. With anywhere between 200 and 700 companies touting a “content management” product or solution, there is a lot of competition for your dollars. That gives you some leverage. Use it. Push the vendors to work with you through a pilot or proof-of-concept where you get access to their system for minimum dollars to test your key assumptions. You probably won't be able to get commercial products for free, but you may be able to negotiate limited access to the software for the cost of support or services for the period of the trial.

Investigate both the product and the vendor

Your management will be looking to ensure that you have a good understanding of both the tool you want to buy and the vendor selling it. The larger the sticker price on the software, the more interested they will be in the long-term viability of the vendor you have selected. No company wants to buy a million dollars worth of software from a company may not be there six months after the purchase. Collect financial reports, including quarterly and annual reports. Look for articles in the financial press that can show that your vendor is likely to be around for many years to come. Your executives will be concerned about long-term support.

Create a formal proposal

Finally, when you feel confident you have given the selection process due diligence, create a formal proposal/report out of your selection. Your executive might only want to read the summary, but they will definitely want to see something that shows the extent of your research. It is the proof of your “due diligence.” Your proposal should include:

- Executive Summary
- Summary of issues with the effective cost of not fixing them
- Summary of your selection methodology
- Required functionality with key and nice-to-haves differentiated
- Short list of systems with positives and negatives identified
- Your recommendation

Your proposal might also include a list of all of the candidates reviewed with a comment on why they were rejected.

Summary

Your executive will be much more likely to approve your CM purchase if you show the same sort of due diligence that they do when approaching business deals. This means being methodical, organized, thorough, and complete. You must consider both functionality and vendors.

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People, processes, and change

Change Management: Dealing with Emotions

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Change management helps to ensure the acceptance of any new system, process, or method. In the case of a content management initiative, where content reuse is critical, there are some unique issues that challenge acceptance, especially if more “traditional” authors take pride in ownership and are passionate about the creative process. In other cases, where authors have to deal with excessive content, the initiative may lead to author apathy. This article examines a recurring change management issue that presents itself in many projects that depend on content reuse—dealing with authors who are either passionate or dispassionate about enterprise content. It describes some of the emotions you may discover during a content management implementation and provides strategies for dealing with them.

Introduction

If you are implementing a content management system, be prepared to manage the change that it will bring to affected areas. If you are implementing content management to enable the reuse of content, expect that it will test the attitudes and emotions of content creators. Be prepared for authors who are passionate about *their* content insisting that they are the only ones qualified to work with that content. In other cases, you may find authors who are all too willing to relinquish ownership of content and embrace the new enabling technology. Those authors prefer to work with content dispassionately, their goal being to achieve routine departmental commitments.

There are two aspects to consider. First, attitudes can vary considerably even from department to department. People, workgroups, and departments have different attitudes about their work and the product of their work. This is typically inherited as part of the organizational culture and should be discovered during the analysis part of your content management project.

Second, in most cases the attitudes prevail from before implementation through to deployment and operation. The implementation of content management is often a coincidental imposition on what exists. Therefore, two kinds of adjustments are required. As a project manager or sponsor, you may need to adjust the way your system is deployed relative to organizational strengths and weaknesses. As a business owner or change agent, you may need to adjust organizational attitudes about content ownership and lead a transition that shifts existing passions from the desktop to the organizational mission.

Know your affected areas

As you set out to analyze organizational opportunities for improved information processing, be sure to take a good, honest look at prevailing attitudes in the affect areas. You will want to moderate your project’s short and long term goals relative to the collective willingness to change. Although attitudes are not obvious matters for immediate concern, they will prove to be of paramount importance as you move toward deployment, and when the reality and scope of change starts to settle in.

During analysis, as you investigate organizational strengths, pay equal attention to the organization’s health in terms of team spirit, attitude, and general atmosphere. To what degree are the authoring groups enthusiastic about their content, their departmental objectives, and their organizational mission? Are they empowered to bring about change? Is there a vital culture based on learning and team work? These are all indicators of a healthy atmosphere that results in a passion for the greater good of the organization. However, if there are weaknesses in these areas, they may indicate a tendency for parochial attitudes and a perpetuation of “content silos”¹.

Although a content management system will introduce considerable benefits to the organization and to those who participate in the content life cycle, it will also introduce challenges that expose the organization’s emotional state. It is important to note that any emotional state is completely independent of content management implementation because it may exist before, during, and after implementation.

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These conditions are not easy to detect, especially if you are not looking for them. Look out for the emotions described in the following sections and be aware that any given stakeholder can present a composite of these emotions. For instance, it is common to see passion and obsession in the same form.

Passion

The pride of ownership felt by many authors is accompanied by a passion for what they do and the creative process they are involved in. This is a healthy emotion unless it is left unchecked and marred by personal ego. Watch out for authors who cling to traditional methods of writing whole information products because they feel that no one else knows the subject matter or audience as well as they do.

Obsession

Developing content can be a complicated matter and authors may be obsessive about the need to control every little detail. Attention to detail is admirable unless it becomes excessive to the point of mistrusting any other person or system used to format, transform, translate, or otherwise process the content. Content management systems are complex by virtue of the problem that they address. Obsessive authors may be reluctant to relinquish control to automated procedures.

Apprehension

Many people feel they have made a tremendous learning investment in their existing processes and have developed skills both routine and value-added tasks. There is a natural tendency for them to believe that their existing skills will no longer be required or that the new methods will not complement the skills they believe are needed in other job settings.

Skepticism

Unless the organization is forward and collegial, people can easily become cynical of existing procedures and objectives, which will carry over into any new objectives. Introducing content management in such an area will be met with skepticism and doubts about whether the benefits are achievable.

Isolation

Smaller authoring groups can suffer from isolation and feelings of disconnection with the big picture. Such a group may not appreciate the value of their efforts in the broader perspective and may have difficulties understanding how their content can be unified with efforts in the rest of the organization.

Apathy

When dealing with massive volumes of content, overworked authors and reviewers can be stricken with apathy. Although content produced apathetically can threaten the quality of your definitive source, it can only be improved with aptly designed content management and workflow.

Engage your affected areas

A variety of change management techniques can be applied to address any one of the various emotions. However, in general, some basic strategies can be employed to garner support regardless of the specific emotions in your affected areas. Take note that neglecting stakeholder engagement is perhaps the single greatest cause of failing change initiatives. The time and energy invested in stakeholder engagement will pay invaluable dividends when it is time to change.

Plan for change

Your project plan should include a change management plan that describes how you will gain support from analysis right through to deployment. The rational-empirical approach to change management advocates that you explain, demonstrate, and train. The common factor is communication, which takes time. Plan for these activities by evaluating how much effort is needed and document it in your change management plan.

In each of the affected areas, you will want to explain the objectives of the project and how the envisioned change will alleviate their specific issues with the existing process. As you explain, listen for variations of known issues and include them in your requirements or have them formally closed.

Demonstrations are a great way to allay fears of the unknown. Make the envisioned change comfortable and familiar to those who fear change by showing

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how the concepts and tools will work to their advantage. Use specific scenarios that are meaningful in their business process. Be prepared to gather additional issues and further assess the area for continuing or changing attitudes.

A good training program might include conceptual training early on followed by practical training as specific tools or methods are put to test. Learning is known to be a primary agent for bringing passion to the workplace^[2]. Delivering abundant training will ensure that stakeholders understand the initiative, support it, and are equipped to contribute content of superior quality.

Deal with emotions

Generally, you will find that the majority of your authors can be categorized as belonging to one of the emotional groups or another based on the organizational culture. Develop a change management plan to deal with the majority and include measures for engaging the others.

If your affected areas include stakeholders from numerous emotional groups, you should plan the transition as appropriate. In addition to organizational change management, use the following guidelines to gain support and debunk any misconceptions.

- Passion - When addressing this group, draw them into information modeling activities, explain that content ownership rests with the enterprise and demonstrate how collaboration will effectively reduce workloads and encourage creativity in satisfying a broader audience.
- Obsession – When addressing this group, build trust by demonstrating how the envisioned change will manage the routine details automatically, but with flexibility that allows for manual intervention where necessary.
- Apprehension – When addressing this group, emphasize that their existing core skills are needed to affect a successful organizational change. Use training to excite them about how they will use their new skills required by content management.
- Skepticism – When addressing this group, explain how the initiative has management commitment and demonstrate how the concepts of content management can be put to good practice.
- Isolation – When addressing this group, explain their necessary role in the broader scheme of

things and demonstrate the basic concepts of information reuse.

- Apathy – When addressing this group, explain how the envisioned process will reduce workloads, demonstrate how automated procedures will enforce consistent quality, and build excitement with training on the new methods.

Summary

When implementing content management, it is important to be in tune with the attitudes and emotions of the affected areas. If resistance is nominal and the need for change is compelling, then proceed with the project using some of the identified techniques. If the organization is suffering from acute emotional weaknesses, or if the benefits of the initiative are not worth the necessary change, take a serious look at whether this is the right time to proceed.

Having said this, management should recognize the tremendous opportunity of your content management initiative to shore up consistent quality and bring back the passion for higher enterprise goals. After all, content management is designed to reduce the tyranny of work so that authors can get on with higher-value collaborations and move ahead with pressing enterprise goals.

Most importantly, use a project plan with change management that is appropriate for the emotions in your enterprise. If the transition is staged appropriately, people will learn the new concepts and skills, embrace the change, and take a new form of professional pride in the smarter ways of working with content.

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Gaining management support

Tips for Building a Business Case

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In most organizations, you first have to prove you need something before you get the go ahead to do it or buy it! Implementing a content management solution is no different. While sometimes it's okay to forge ahead, then ask for permission (or forgiveness) later, in most cases, you'll need to secure resources first. And, to secure resources, you usually need to explain why, which means you need a business case. So, what goes into a business case? What should you consider when gathering information? Here's is a checklist with some tips, some things to consider, and some advice, aimed at helping you through what many consider a daunting task

- Define your project and identify its scope

One of the most important—and one of the first—things to do is to figure out what you're asking permission for. Accordingly, the first item in your checklist should be to define what it is that you want to do and to break it down into phases. You need to be very clear. Are you asking for permission to buy the technology, are you asking for permission to allocate resources to analyze your content and make recommendations? Are you asking for permission to form a team to work on a content management project? It's important to define exactly what you are building a business case for, but you should also keep in mind that the various phases of a content management project may need individual business cases. So, if your first phase is to analyze your current content and content life cycle, followed by a second phase of modeling content and creating Schemas, both phases may need businesses cases, depending on how your company operates. The point is to decide what you are asking for—very specifically—then ask for it.

- Consider the timing

Figure out the timelines for the phases of your project, and consider how much time it will cost your internal resources to work on it. This is something management almost always wants to know! You can pretty much rest assured they will ask, "How much time will this take?" And, "how will you get your other work done in the meantime?" You should have approximate timelines worked out for the whole project, and for its various phases so you can approach it in manageable pieces. Also, consider what other projects are going on in your company that may affect your ability to complete your project. If your company

is going through a merger, or announcing a new line of products, maybe now is not the best time to think about a content management project. Or, maybe it is if it can help you to meet deadlines and manage information coming from the other merged companies...but this would be further down the road, not immediately. It's important to know how much time you'll need, how much time other resources will need, and what else is going on in the company that is putting demands on peoples' time.

- Consider your company's business strategy and goals

Connect your content management goals to your company's business strategy. You need to figure out what the issues your company is facing, what the five-year plan is, so you can quantify your content management project in relation to the business strategy. It's important to focus on business outcomes, such as improving customer satisfaction or improving content quality for front-line staff who support customers. (Rahel Bailie's and Nina Junco's article in this issue provides an excellent example of content management aligned with business strategy. See the feature article, *Making the Case for Content Management*.) For each of your project goals, identify targets and determine how meeting those targets will be measured.

- Educate management about content management

Without sufficient knowledge about content management and its benefits, management will not be able to make informed decisions about your project, and in fact, much of your business case will not make sense to them. You need to dedicate some of your business case to explaining content management to them. Again, Bailie's and Junco's

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article provides excellent advice on how to do this!

- Determine appropriate management sponsorship

When putting forth a business case for content management, you're probably proposing it to your own management team. However, there may be other management sponsorship available to support your project. The more management buy-in, the greater the chance that you will gain support for your project. Who is in the best position to benefit from sponsoring your project? How, specifically, will they benefit? Your management may be "relieved" to know that there are others in the organization who can share the work, and the costs!

- Think about the risks and form a risk mitigation strategy

Consider possible project risks and ways to manage those risks. You may not be able to avoid them, but you can manage them by doing such things as constraining the project scope, avoiding very large enterprise content management projects that attempt to take on ALL content in an organization, and selecting a pilot project that will help you realize success and gain knowledge to move forward with additional projects.

- Select and describe your pilot project

When selecting a pilot project, be clear about its goals. Be clear about what you are trying to accomplish during the pilot and be sure to set measurements for your goals. How will you know you've succeeded?

- Select team members and describe their roles

This ties in with considering time requirements and with selecting your pilot project. You should figure out what internal resources you will require, what external resources, and what the associated costs are for each. Also, outline each person's role on the project. Figure out roles and their requirements for during the pilot and on an ongoing basis. You need to be specific about what you are asking each team member to do, about why that person is a good fit for your project, and you need to show that you are considering this person's other responsibilities.

- Outline all the costs (and their associated benefits) of implementing a content management system

You need to figure out ALL the costs and you need to be able to justify those costs through ben-

efits. Can you identify potential revenue from your content management solution? What about saving money? Can you quantify non-tangible benefits? Determining your ROI is critical; this issue also includes an article by Ann Rockley on determining ROI. See *Creating a Winning ROI* for more information. Bailie and Junco also discuss the importance of ROI in *Making a Case for Content Management*.

- Communicate!

Above all, you need to communicate beyond the business case. You need to start "planting the seeds" well before you actually make your business case so management isn't overwhelmed with unfamiliar information and so they understand some of the "language" of content management. You need to communicate as part of the business case, both on paper and in person. Putting forth a business case requires more than documenting your requirements and turning it in for review. You should also make presentations to help breathe life into your project. And, you also need to communicate once your project is underway to let people know "how their money is being spent." You need to tell them what you're doing, what successes you've had, and you also need to be honest about any problems so they can help to resolve them. Determine key messages to communicate, to whom, when, and how.

Case Study

How Guidant Corporation Gained Support for their Content Management Project

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Background

Guidant, located in St. Paul, Minnesota, is a world leader in the design and development of cardiovascular medical products. In a highly regulated environment, Guidant provides physicians with leading-edge technologies for improved patient management and clinical outcomes. The Technical Communications group produces product documentation for Guidant products, such as physician's manuals, operator's manuals, and technical manuals. Product documentation must meet stringent regulatory requirements. Because of issues in authoring and reviewing content, Guidant's Technical Communications group identified a need to move to content management.

Authoring

The Technical Communications group was experiencing several issues in authoring, including:

- Authors created many files using a desktop publishing application, then stored them on a shared drive
- Copy and paste was common but it was difficult for authors to know which document to use as the source file
- Authors wrote in silos, resulting in content being inconsistent from product to product
- Authors typically managed numerous product complexities, with variations from product to product

Reviewing

The review process was also problematic with:

- Last minute change requests from reviewers, resulting in errors
- Authors having difficulty identifying which documents were affected by product updates
- A high volume of product reviews, which at same time resulted in limited quality review time
- No overlap between product teams, resulting in inconsistent reviews
- No formal process to track reviewer comments

Ongoing challenges

In addition to issues in authoring and reviewing, Guidant was facing a number of ongoing challenges, including:

- Managing more complex products
- Adhering to accelerated schedules
- Meeting increasing regulatory requirements

Goals

Guidant had a number of goals including:

- Improve productivity
- Increase consistency in content and minimize errors, omissions, and recalls
- Write and review content across products (single source) and track reviewer comments
- Reduce translation costs and reduce the burden on "in-country" reviewers
- Eliminate redundant content
- Improve production, tracking, and storage of content
- Assemble common content rather than copy and paste
- Make it possible for other functional groups (e.g., clinical, regulatory) to reuse content from product labeling

Case Study

What we did and why

To address our issues, we decided to adopt a unified content strategy supported by XML-based authoring and content management. Our first step was to build a solid business case, which we approached from two directions. The first direction is from the viewpoint of compliance mitigation (e.g., mitigating compliance risk) and the other is from the perspective of making quantifiable returns (e.g., saving money).

The compliance mitigation proved to be the most powerful argument for our business case. We built a “story” around what would happen if there were a labeling issue. People expect the information to be right and regulatory agencies exact a high price if it isn’t, such as fines, product withdrawal, lost support for a product in a specific country.

To support the case for compliance mitigation we looked at the costs of:

- Millions in a litigation case
- Correcting an error internally
- Lost revenue if we had a recall

And we determined how we could minimize or avoid some of these costs.

Benefits

In addition to the compliance mitigation case, we identified a number of cost savings benefits that would result from adopting this strategy, including:

- Reduced cost of translation through content reuse. This reuse includes:
 - 70% reuse between therapies described in the system guides
 - 70% reuse between patient guides
 - 90% reuse in warranty information
 - 100% reuse between the physician’s guide and technical manual
- Increased consistency in product labeling
- Reduced review time of at least 50% for labels. We currently have 50 models that result in 1200 labels and are translated into six languages, resulting in a review /proof time of 37.5 days. We wanted to cut that time in half.

- Significant reduction or complete elimination of desktop publishing costs due to the use of XML (e.g., desktop publishing is no longer required, because it is controlled by style sheets). Current costs are \$50,000 per product.

Challenges

We were surprised to find that we had very few challenges to the business case. Management was very conscious of risk in content and the gains they could realize from the compliance issues. In addition we had:

- Done our homework so that we clearly understood what Guidant would be getting from the system
- Laid out the business case very clearly by:
 - Telling the story
 - Identifying what they needed to purchase (technology and consulting)
 - Tying the story to current events
 - Tying the solution to real measurable benefits
 - Making it clear how the solution would be beneficial in the years to come

Management insisted on the development of criteria for success that we would have to report back on annually. The development of the success factors really helped to focus us on the winning business case.

Outcome

We decided to test the content management strategy on a brand new product. This was beneficial as there was no legacy content to convert, but because content creation and review were for new material, we are projecting ongoing savings rather than current savings. However, there is a commonality between the new product and the existing products that has already resulted in a savings of 20% in translation costs.

Case Study

Lessons learned

- Talk informally to groups that will be affected by the initiative in advance of the formal business case presentation to gain insight and feedback on what to include and not include in the business case

Before we presented the business case through a formal presentation we talked to a number of functional groups (IS, engineering, regulatory) to provide them with an understanding what we wanted to do, what would be the impact and benefits. They provided us with a lot of good feedback on what to include or not include in the business case.

- Develop criteria for success

Develop your criteria for success so that you can point to positive measurable outcomes. The criteria for success have enabled us to go back for second phase funding.

- Always plan on spending more money than you think

Don't be too conservative; err on the side of the high end. It is better to come in under budget then have to go back for more money part way through.

Ammunition to Help Build your Business Case

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If you're looking to convince your boss that content management is a smart move, you're going to need some ammunition. In this installment of In the news, you'll find links to web sites where you can learn about the hurdles preventing some organizations from adopting content management, what the common business drivers are, and how to determine total cost of implementation. Knowing this information up front can help you make the case for adopting content management, prepare an appropriate budget, and develop a reasonable project plan to help you avoid the mistakes made by others.

Implementing XML Content Management: Hurdles and Reasons

Information Mapping conducted a Content Management Solution survey in January 2005 with results tabulated and analyzed in March and April 2005. The survey was conducted to understand how organizations have prepared to implement CMS, the extent to which XML strategies are utilized, and the decision process for doing so.

Although full demographic information on respondents is not available, the results are inclusive of 380 complete responses from a diverse set of industries, job titles, and organization types.

Results of the Survey include:

- 69% of respondents have no plans to execute an XML strategy for content management. According to respondents, issues affecting the adoption of XML content management include:
- Insufficient XML talent pool
- Shortage of mature XML authoring tools
- Lack of stable standards
- Numerous customizations required to make software solutions work
- Reduced IT budgets

Nearly one-third of respondents claim to have implemented an XML-based content management solution, despite these reasons. Why did they do so? According to the survey results, regulatory compliance is the primary driver. Another major reason for change is the need for highly structured procedural documentation. Still others said the move to XML content management was part of an overarching enterprise information architecture initiative or a byproduct of recognizing the importance of treating content as a business asset, worthy of being efficiently managed.

When asked what the biggest obstacle to adopting XML content management, 30% said cost justification (showing return on investment), followed closely by concerns that such a project could not be completed quickly.

Download a copy of the survey results: http://www.infomap.com/rc/articles_whitepapers/cm%20Solution%20Survey.doc.

Web Content Management Implementation Spending

In *Spending Patterns During CMS Implementation* (June 1, 2005), James Robertson explores three main phases of web content management projects – Implementation, Adoption and Enhancement – and provides recommendations for planning. Robertson says the biggest spending on web content projects occurs during implementation. Common implementation expenses include:

- Software installation
- Layout and design
- Content modeling
- Legacy content conversion/migration
- Testing
- Training

Read the article here: http://www.steptwo.com.au/papers/cmb_spendingcms/index.html

Determining Total Cost of Implementing a Content Management System

If need to convince upper management why your organization should move to content management, Martin White has information you need. In *The Content Management Handbook* (2005, Facet Publishing), White discusses how important it is to take into account Total Cost of Ownership before selecting a content management system.

Read more about *The Content Management Handbook* here: http://www.amazon.co.uk/exec/obidos/ASIN/1856045331/ref=ase_steptwodesign-21/202-3519585-3751803.

Buying Plans, Business Drivers and Implementation Challenges

AIIM, the enterprise content management (ECM) association, is an excellent resource for those involved in content management budgeting and return on investment planning. The organization recently conducted a survey of content management professionals in England, Ireland, Germany, Australia, Brazil, Canada, United States, Belgium, the Netherlands and Luxembourg). The survey, entitled *Payback Time: The Practical Application of ECM Technologies* ([href=http://www.aiim.org/industry-watch.asp](http://www.aiim.org/industry-watch.asp)) examined buying plans, core business drivers, and implementation challenges.

According to AIIM, "Respondents came from a variety of industries, with significant representation from Manufacturing (5%); the IT Industry (9%); Banking, Finance, and Insurance (13%); and Government, Defense, and Public Services (28%). Small organizations (199 employees) represented 30% of the overall sample, medium-sized organizations (100-1,000 employees) were 28%, and large organizations (over 1,000 employees) were 42%. Those characterizing themselves as 'looking at my first ECM project, still have a lot to learn' represented 30% of the sample; 20% were enhancing an initial system; 45% characterized themselves as 'experienced—looking at a 2nd or subsequent project'."

The survey found that cost (45%) is the primary driver for adopting content management, while customer service improvements ranked second (31%), and risk reduction (24%) third.

Cost drivers include:

- Improving efficiency
- Reducing expenses
- Increasing profits
- Improving performance

Customer service drivers include:

- Improving customer service
- Maintaining a competitive advantage of the competition
- Improving turnaround time
- Increasing response times

Risk reduction drivers include:

- Compliance
- Risk management
- Business continuity

While cost reduction is the dominant reason for adopting ECM, customer- and risk-related drivers are rising in importance, compared to a similar survey conducted last year.

Other AIIM survey findings include:

- Scale and scope of implementation affect obstacles. Problems shift— from getting senior management commitment and defining requirements to issues including change management, developing and maintaining employee commitment, and content integration.
- ECM projects need to be extremely practical and offer a clear payback.
- Email management, forms, and security are rising concerns.
- "Mid-sized" organization (those with 100 to 1,000 employees) understand the need to get their core document requirements under control and represent a huge untapped market. Solution providers will need to adjust their pricing (lower) to tap into this market.
- Despite having the most litigious culture in the world, users in the U.S. are not as aware as they should be of the importance of managing electronic information. Ironically, U.S. users are the least confident among the countries surveyed in the integrity of their electronic records.

In the news

- The percentage of end-users that have purchase plans exceeding \$1 million for ECM technologies rose from 17% in 2003-2004 to 19% in 2004-2005 (among those reporting purchasing intentions).

Detailed statistics are included in the full version of the AIIM survey and are available here: <http://www.aiim.org/industry-watch.asp>.

If you'd like to learn how to document expected return on investment, consider attending the AIIM webinar, "Achieving Results Through ROI Analysis," August 10, 2005 (2:00pm EST). The presenter, Bud Porter-Roth, will look at the component parts of a typical ECM system and review what is needed to generate a credible ROI for each component. Included will be a discussion on hard dollar returns, soft dollar returns, simple value-added propositions and who should participate in formulating the ROI.

Register at <http://www.aiim.org/webinar-events.asp?ID=3274>.

Contributors

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Rahel Anne Bailie is the President of Intentional Design Inc., a technical communication company focused on improving the performance of communication products to organizations in a range of industries. IDI provides technical communication services in the areas of content development, and consulting on content management and usability projects. She is A-dec's content management consultant, assisting with implementation of a content management system to help improve documentation quality, processes, and technologies.

Nina L. Junco

Nina L. Junco manages the technical communications and technical training groups in A-dec's Marketing Communications department. She is guiding her team as they establish a company policy for translating technical documents and eventual integration of these documents into an implementation of a content management system. She has a background in marketing, sales, training, and technical publications. Her interest is exploring how family systems therapy applies to corporate business structures.

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Lori Kegel is a Manager with Guidant Corporation, leading a team specializing in technical writing, translations, and content management systems that support the company's product labeling. Lori has more than 19 years experience as a manager in several industries and has spent much of her career championing change by building business cases for new innovative processes and technologies. Lori's most recent success is championing a project to implement a unified content strategy.

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Pamela Kostur is a Principal with The Rockley Group, specializing in information analysis, information modeling, and structured writing to support a unified content strategy. Pamela has over 18 years experience developing information solutions. During that time Pamela has completed many projects and presented papers at numerous conferences on topics including iterative usability, miscommunication, structured writing, editorial "magic", building and managing intranets, creating usable online documentation, unified strategies for web-based learning, information modeling and analysis. Pamela is a co-author of *Managing Enterprise Content: A Unified Content Strategy* with Ann Rockley and Steve Manning.

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Ann Rockley is President of The Rockley Group, established to assist organizations in adopting content management, unified content strategies, and information architecture for content management. Ann has been instrumental in establishing the field in online documentation, single sourcing (content reuse), enterprise content management, and information architecture of content management. She is a frequent contributor to trade and industry publications and a featured speaker at numerous conferences in North America and Europe. Ann is the author of *Managing Enterprise Content: A Unified Content Strategy* with TRG Senior Consultants Pamela Kostur and Steve Manning.

Contributors

Steve Manning

Steve Manning is a Principal with The Rockley Group and has over 16 years experience in the documentation field. He is a skilled developer of online documentation (WinHelp, HTML Help, Web sites, XML, and Lotus Notes) and has created single source production methodologies using key online tools. Steve has extensive experience in project management and has managed a number of multiple media, single source projects. Steve teaches “Enterprise Content Management” at the University of Toronto, and is a frequent speaker at conferences (ASIS, AUGI, STC, ACM SIGDOC, DIA) on the subject of XML and Content Management. Steve is a co-author of *Managing Enterprise Content: A Unified Content Strategy* with Ann Rockley and Pamela Kostur.

Call for Submissions

The Rockley Report publishes original material related to content management, including its goals, its implementation, the technology required to support it, and its affect on organizations. If you're interested in submitting to *The Rockley Report*, we'd like to hear from you. Please send us your ideas for articles in the following categories:

- **Best Practices** — Articles in this category describe content management in the “ideal” world and suggest how to put those ideals into practice in the “real” world. Best practices focuses strategies, activities, or approaches that have been shown through research and evaluation to be effective.
- **Information Architecture** — Articles in this category explore the relationship between information architecture and content management, including topics such as building a blueprint for a content management strategy and content modeling.
- **Tools and Technology** — Articles in this category investigate the technology required to support content management.
- **People, Processes, and Change** — Articles in this category discuss management issues related to content management, such as changing roles and writing in a content management environment.
- **Gaining Management Support** — Articles in this category provide strategies for helping management understand the benefits of content management, focusing on topics such as building a business case for content management and calculating ROI.
- **Case Studies** — Case studies explore how companies are implementing content management and focus on what they did and why, their benefits, and their lessons learned.

If you have an story you'd like to submit, please write a 250-word description of your topic, the category you think it best fits, then send it, along with a 100-word bio, to Pamela Kostur at kostur@rockley.com.

Next Issue

Content reuse is a critical component of a content management strategy. Content reuse is the practice of reusing components of content in numerous places, going beyond “manual” copy and paste. Content reuse ensures that content is consistent wherever it is used and eliminates the need for multiple authors to create the same or similar content over and over again. However, content must be structured and written consistently for it to be reusable—and usable. The next issue of *The Rockley Report* explores content reuse, tackling subjects such as forming a content reuse strategy and structuring content for reuse.

The next issue will be available to subscribers in late September.

We'd love to hear from you. If you're interested in contributing an article on some aspect of content management to *The Rockley Report*, please contact kostur@rockley.com. We'll send you our authoring guidelines and get you started.

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We'd love to hear from you. What do you think of the *Rockley Report*? What would you like to see in the future?

If you have any questions, comments or suggestions, please feel free to let us know. The easiest way to reach us is via email. Our Editor, Pamela Kostur, can be reached at kostur@rockley.com.

Visit our corporate website at www.rockley.com, or the website for our book, *Managing Enterprise Content: A Unified Content Strategy* at www.managingenterprisecontent.com.

We hope you enjoyed this issue, and hope to hear from you soon.