To my mother, Dida Rockley—a librarian—who instilled in me her love of books, her desire for knowledge, and her ability to organize information. And to my father, J.W. Rockley (Rock)—a management consultant—who became my mentor in business.

Dedicated to my mother, Elizabeth Cooper, who passed her love of exploring the world through books and reading to me, and to my father, Earl Cooper, who instilled in me the love of examining the world around me, taking bits apart, and attempting to put them back together—just a bit better.
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About the authors and book team

It’s not possible to write a book without the help of a lot of different people. The following provides information about the authors and the people who helped make this book happen.

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Known as the “mother” of content strategy, she introduced the concept of content strategy in 2002 with the first edition of this book. Ann was ranked among the top five most influential content strategists in 2010.

Ann led Content Management Professionals (CM Pros), an international organization that fosters the sharing of content management information, practices, and strategies to a prestigious eContent 100 award in 2005. Ann was cochair of the OASIS DITA for Enterprise Business Documents subcommittee in 2009–2011.

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Mark Lewis is a contributing author of DITA 101, second edition, by the Rockley Group. He has authored several white papers on DITA Metrics that prove the savings and high content reuse percentages possible with DITA’s structured, topic-based architecture. His DITA metrics model was a 2009 competitor for JoAnn Hackos’s Rare Bird Award. Mark manages the DITA Metrics LinkedIn group. He has presented on technical writing, DITA, and object-oriented design topics at DocTrain, STC, DITA North America, and other national conferences. Mark is a member of the Organization for the Advancement of Structured Information Standards (OASIS) DITA technical committee. He and John Hunt are cochairs of the OASIS DITA for the Web subcommittee. He has received Society for Technical Communication (STC) awards for Distinguished Chapter Service and the Florida Technical Communications Competition. Mark is the DITA product manager for usability and a product evangelist for Quark.

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Editorial

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Illustrations and cover design

Natasha Lessnik-Tibbott began her illustration career at SPY magazine, digitally drawing the numerous tiny charts, maps, and graphs for the first time in the history of magazine publishing. Since then her work has appeared in many publications and books, graced the information kiosks of the International World’s Fair in Barcelona and expanded to op-ed pieces for the New York Times. She was born in Toronto, worked for over a decade in New York, and currently resides in Nashville, where she is a partner in Our Designs, Inc.
Acknowledgements

A lot of people helped make this book a reality, and we’d like to thank them for all their assistance.

We would like to thank our case study contributors, who provided exemplary examples of projects based on their wide experience in the industry. Rahel Anne Bailie, a content strategist evangelist, shared her experience with the City of Vancouver website redesign. Derek Olson, an innovator with a keen interest in content strategy and intelligent content, shared the story of the development of an app for BreastCancer.org. Joe Gollner, a longtime advocate of XML and intelligent content strategies, shared his story of a government organization that adopted intelligent content technologies. Richard Thompson caught our eye when he posted to the content strategy listserv about a low-tech but highly ingenious content strategy, and we asked him to repeat it for the book. Noz Urbina, a content strategist, content management specialist, and strong proponent of XML, shared the story of Elekta’s successful move to DITA and managed translation.

We couldn’t have done the book without the help of our reviewers. They each looked at the content from a different industry perspective, ensuring that the book met multiple industry requirements. Scott Abel, aka The Content Wrangler, who knows everything about everything in the content industry, provided his always insightful and laser-sharp comments. Ingrid S. Goldstein drew on her extensive publishing experience to give us industry-specific feedback. Mark Lewis, a DITA evangelist, did an incredibly thorough review, catching problems and making valuable suggestions. Clare O’Brien, a digital marketing and communications professional, provided feedback and identified additional areas of emphasis.

Marie-Lynn Hammond, whom we first got to know as a singer-songwriter before we learned of her editorial skills, provided meticulous copyediting changes. Laurel Simmons, a longtime friend and colleague, did pass after pass after pass to catch editorial issues.

Natasha Lessnik-Tibbott, a graphic designer (and a friend reaching all the way back to high school) created the cover design and illustrations for each of the scenarios.

We’d also like to thank our Peachpit team. Margaret Anderson, our developmental editor, provided much needed hand-holding and guidance, and worked closely with production to make this book happen in a very short period of time. And just when we thought there couldn’t be any further edits, Gretchen Dykstra, our proofreader, polished the language further.
Foreword

Ann Rockley has been talking about content strategy and intelligent content for over a decade. Why haven’t the rest of us been talking about it, too?

Perhaps Ann’s vision of content as a business asset was simply ahead of its time. Maybe the idea of “intelligent content”—content that’s free from the constraints of a document or page, and therefore free to adapt to any context or platform—didn’t seem as applicable to our challenges as, say, a website redesign or migrating to a new content management system. Of course, none of our tactics seem to have solved the core challenge enterprises have faced: ineffective, poorly organized, and laborious content processes.

So here we are, stuck with the same challenges we had last year, and the year before that, and the year before—you get the picture. On top of it all, we’re dealing with the constant introduction of new platforms where we need to (or should) make content available to our customers. There are countless new opportunities to deliver the right content, to the right people, in the right place, and at the right time. How can we take advantage of them without starting from scratch?

The good news is, we don’t have to. It’s very likely that your organization has at least some form of content infrastructure; the question is, how will it need to change? As Ann and her coauthor, Charles Cooper, write, “The processes and best practices to create and manage content are undergoing a dramatic shift as content creators adapt to the increasing demands of a volatile content world.” I’d call this an understatement. Content processes and best practices are evolving at the speed of light, and it’s not enough just to keep up. If you want your content to truly realize its value as a business asset, you need to be able to look ahead. And the only way you can continue to face forward toward an unknown future is to know your content is truly ready for it—no matter what may come. That’s intelligent content.

Ann Rockley is nothing short of a visionary, someone who truly understands the value of content as a business asset. Intelligent, adaptive, nimble, or agile content—call it what you will, but without it, you’ll stay mired in the content mess that’s keeping you from getting ahead. It’s time to make intelligent content a reality for your organization. Managing Enterprise Content: A Unified Content Strategy will show you how.

Kristina Halvorson
Introduction

A unified content strategy is about much more than just content. It’s about how you create content once and how you publish many times from that content. It’s about pulling together the best practices, guidelines, and content structure your organization needs to enable you to rapidly design, build, test, and deliver a customer-centric content experience across many channels.

It’s about looking back at what worked and looking forward to what can work even better. It’s about using all the resources you have in your organization: your people and teams, your departments, your technology, your vendors, your assets, your customers, and the content you have already created and will be creating.

A unified content strategy places the emphasis on “unity”—people and technology coming together to produce content that serves the needs of everyone who reads and uses that content.

Is this an easy task? No. But it’s a necessary one as organizations battle it out in competitive markets for the attention of their most precious resource—their customers!

In this book, we will explore all the aspects of creating a unified content strategy. We’ll show you the pitfalls to avoid, and we’ll explain what you can do and how you can do it to create a unified content strategy that serves your organization’s needs now and well into the future.

Who should read this book?

This book was written with a number of audiences in mind. It is designed to assist content managers who are responsible for creating and managing content in many different channels for many types of customers. Content managers will learn what they need to know about what is involved in developing what we call a unified content strategy.

This book is also designed for content strategists who are responsible for designing an effective content strategy not for just one channel, but for multiple channels. Content strategists will receive practical advice on analyzing the requirements for and developing a unified content strategy.

This book is also designed for authors, specifically anyone responsible for creating structured, modular content for multichannel products. Authors will receive practical advice on structured writing, writing for multiple channels, and collaborative authoring.
How this book is organized

This book is divided into five sections. Each section focuses on a particular aspect of creating a unified content strategy and how that serves to help you manage your content. You do not have to read this book in chronological order, but it is designed to lead you through the logical stages of implementing a unified content strategy.

Part 1: “The basis of a unified content strategy” (Chapters 1–2)

This section provides an understanding of what makes up a unified content strategy, and why it’s such an important foundation for getting content out to the right customer at the right time and in the right format. We also explain the concept of a sustainable and intelligent content strategy—one that will deliver maximum benefit to the users of content while minimizing the cost to the organization.

Part 2: “Where does a unified content strategy fit?” (Chapters 3–6)

In this section, we discuss the implications of what content means for organizations today. We explore the issues of content as a strategic asset, how content can be delivered to customers through multichannel delivery mechanisms, and what content strategists must think about as they prepare for that multichannel delivery. We also talk about the concept of content reuse and how organizations can reuse content to their advantage.

Part 3: “Performing a substantive audit: Determining business requirements” (Chapters 7–11)

Customers are the reason for your business’s existence, your products and services, and your content. In this section, we explain how you can understand your customers’ needs and your organization’s needs for unified content. We show you a discovery process we call the substantive audit, which allows you to figure out what processes you are using to produce your content and how you can unify those processes. We’ll discuss ways to identify the dangers and the opportunities available to your organization as you begin the process of creating a unified content strategy. We’ll show you how to perform a content audit that gets to the heart of the issue—your content and how it suits your audiences. And then we’ll help you pull together the big picture as you visualize your unified content strategy and the content lifecycle that is part and parcel of it.
Part 4: “Developing a unified content strategy” (Chapters 12–17)

At the heart of a unified content strategy is the methodology involved in creating models for your content, determining how you want to reuse content, defining how people produce content, and managing all the change that has to take place in your organization to make your content strategy effective. We’ll show you what content modeling actually is, and we’ll show you what the different types of content reuse are. We’ll discuss how you pull together all the tasks and processes that are required for implementing a successful content strategy through workflow. We’ll tell you about the information (the metadata) that you’ll need to track your content. Then we’ll focus on creating the content—why you need to separate format from content and how you can create structured writing guidelines that will help you in setting up collaborative authoring.

Part 5: “Supporting your unified content strategy” (Chapters 18–20)

A unified content strategy depends on the people, and the roles they fill, to support it. We’ll discuss the type of roles you’ll need—and you’ll probably find some new roles that you’ll need to introduce to your organization. Along with people, technology also needs to support your unified content strategy, so we’ll discuss XML, the underlying technology that makes modern content management systems possible. At the end, we’ll wrap up with a discussion about how you can integrate content management into your environment, what types of authoring tools are available, workflow systems you can set up, and delivery mechanisms you can choose.

At what level is this book written?

This book is written with the assumption that readers have some exposure to the concepts of content strategy, but that most readers do not understand the concepts of a unified content strategy and what has to be done to implement one. It is designed to ensure that all the concepts are clear no matter what your existing knowledge level is.
What you should take away

This book will assist you in creating, implementing, and managing your unified content strategy. It will help you define your requirements and build your vision, design your content strategy, understand the tools, and overcome the hurdles of creating and managing content in a multichannel world. We hope that it will help you see the broad spectrum of a unified content strategy and how you can escape the tyranny of format.
Digital publishing is fast becoming a critical requirement for publishers. It’s no longer just a desirable capability; it’s a matter of survival. Most publishers associate digital publishing solely with the production of eBooks and fall short of the mark. The crucial point for publishers today is to prepare their content for multichannel delivery where printed books and eBooks represent only two possible delivery channels.

The digital world offers many more possibilities to use content. Different types of content can now be connected with a wide variety of user experiences (UX): Fiction can be read as digital pages of eBook readers, travel guides can connect their route description to GPS devices, and dictionaries, which provide word definitions within text when and where they’re needed, are incorporated into electronic reading devices.

The publishing industry has already changed dramatically, but this is only the start. It will continue to change and the speed of change is expected to increase exponentially. Traditional handcrafted processes are no longer sustainable and automated processes have become an essential requirement.

Content needs to be understood as an asset in its own right, freed from output-based workflows. Device-independent content creation and delivery processes must be adopted instead.
Digital publishing, a tsunami of change

In the last few years the advent of digital publications (eBooks, enhanced eBooks, eBook apps, and digital editions) has started to dramatically change the way publishers do business. Driven by customer demand, slumping print sales, and increasing digital sales, publishers have been racing to convert their backlist to eBooks and simultaneously to publish to print. Some publishers have begun to publish eBook-first, and others have begun to publish eBook-only versions of content. Most eBooks, though, still resemble printed books. This situation keeps publishers happy with the “old world” but is just the first step at the beginning of a radically changing business model.

Aptara’s third survey of eBook publishers’ in 2011 provides insight into the changing field:

- The major driver for producing eBooks is increasing revenue (42 percent), followed by increased customer demand (36 percent).
- The majority of book publishers (85 percent) are printing both eBook and print versions of their titles.
- One out of five eBook publishers generates more than 10 percent of their revenue from eBooks.
- Most eBook production still follows outdated print production models at the expense of significant operational efficiencies.
- The greatest eBook challenge (30 percent) is content format and device compatibility issues.

The publishing process

According to Aptara’s survey (see above), the majority of publishers still follow a traditional print process. To achieve full, device-independent publishing, however, the traditional workflow must change.

Traditional publishing

In a traditional publishing workflow, each book or document is created by one author using some form of text editor or word processor. The document is created, edited, and published as one entity, or possibly a series of chapters, and it doesn’t interact with anything else (see Figure 4.1).

Advantages

- Traditional publishing represents a typical, familiar workflow.
- Familiarity makes it easy to use for existing authors and editors.
- eBooks are created by a technology partner skilled in the conversion of print-oriented content to functional eBooks.

Disadvantages

- The file is managed as a complete document.
- Print-oriented content is converted, rather than specifically designed for eBooks.
- Future changes must be done in the production copy, or the content must be exported back out to Microsoft Word and then re-laid out for a new publication.

Note that in this scenario the creation of successful eBooks depends on the publisher’s understanding of the nature of the eBook they want to produce and the clear communication of those requirements to the technology partner.

This workflow is very effective for the conversion of the publisher’s backlist.
In-house eBook publishing

The in-house publishing workflow for eBooks is very similar to the traditional publishing workflow except for the end product, which is digital, not paper (see Figure 4.2). Publishers use the same publishing software to publish to an EPUB file that they use for print. EPUB, short for electronic publication, is an open standard for electronic books from the International Digital Publishing Forum (IDPF) and is used by the majority of eReaders. In addition, the publishing software may provide the ability to publish to other channels such as Web or mobile.

Advantages

- In-house eBook publishing represents a typical, familiar workflow.
- Familiarity makes it easy to use for existing authors and editors.
- The publisher creates their own eBooks from the publishing software.

Disadvantages

- The file is managed as a complete document.
- Print-oriented content is converted; it is not specifically designed for eBooks or other channels.
- Future changes must be done in the production copy, or the content must be exported back out to Microsoft Word then re-laid out for publication.

In-house eBook publishing often feels like the easiest route for publishers because they don’t have to change any of their process or their technology. However, the content is often constrained by the print paradigm. It’s a difficult task to publish in different ways depending on the channel and the device. More often than not, it ends up as a simple conversion (different look-and-feel), rather than optimized output for each channel and device.

In a recent discussion with a new client of ours, they spoke about the challenges of creating eBooks. The output to the EPUB format was pretty simple, but testing on different devices revealed a number of display problems and usability issues.
They were spending weeks “hand tweaking” the output for each device, and with each new device, the job got larger and more arduous.

**XML early**

Recognizing the challenges they face in publishing to multiple channels and the proliferation of devices, some publishers are choosing to use XML (Extensible Markup Language) in their publishing workflow. XML is a set of rules for encoding documents.

“XML early” means converting your content to XML early on in your workflow to enable you to produce content for multiple channels and to easily reuse content. (See Figure 4.3.)

XML enables you to design and prepare content in a way that’s completely portable and open, which in turn enables a wide range of applications that allows you to automate common content tasks such as formatting. If you make the content intelligent by tagging and structuring it, and then if you design and prepare it for discovery and reuse, you’re freed from managing content within the “black boxes” of completed books. For more information on XML refer to Chapter 19, “The role of XML.”

![Figure 4.3 XML early publishing workflow.](image)

**Advantages**

- Edits can be handled online using collaborative review tools. This speeds up the editing and allows multiple editors to work on the content simultaneously. Change tracking is supported in these tools.

- XML can be configured to support reuse across media (print, eBooks, apps, and so on).

- XML can be optimized to support current and future products (for example, article compendiums, eLearning, and custom books from selected chapters).

- Corrections and changes to content are done in the XML content and “repoured” into each of the outputs. There’s no need to transfer content back and forth.
Disadvantages

- Copy editors and others involved in the publishing workflow need to become increasingly comfortable with working largely online and with new software.
- The concept of WYSIWYG no longer exists because content can be published in multiple formats.
- Content is created and managed as components, which may be a paradigm shift for some people.
- Production staff need to learn to work with structured templates and cannot continue to manually tweak content.
- While most people in the organization don’t need to understand XML, at least one individual will need a strong understanding of XML.

Although XML early has the most advantages, XML can be incorporated into your workflow at any point. You might choose to incorporate it somewhere in the middle of your workflow, with content created in Microsoft Word, but converted to XML after the final manuscript was approved. This could be a long-term strategy, or it might be a short-term strategy only—a stepping-stone on the way to creating a full XML-based workflow.

The role of a unified content strategy

To take advantage of new digital markets, you must rethink the way you create, manage, publish, and deliver content. You must reengineer your processes to create a more flexible and sustainable future. You must also reimagine a production process that frees your content to be easily transformed into whatever new formats and devices that your customers desire. In this new world, a publisher becomes a content and service provider, capable of meeting the ever-changing time-to-market requirements. It is not as straightforward as simply incorporating XML into your workflow, because the workflow is only as effective as your content strategy. You also need to determine how you want to create modular, structured content that can be repurposed for multiple information products and services. What’s needed is a unified content strategy.
Case study: American Society for Training and Development

The American Society for Training and Development (ASTD) is an association for workplace trainers. We create content to help trainers do their jobs better. We publish 20 books per year, a monthly magazine, and several newsletters. ASTD content is mostly evergreen and not time-sensitive, so reuse is central to our content strategy.

Goals

At ASTD we wanted to increase personalization and findability of our content, to reduce production resources (including time to produce the content and headcount), and to generally make it easier to do business with ASTD.

What we did and why

ASTD started by improving production workflow. We mapped out the current production workflow in a new content management system (CMS) and added automated email notifications, status reporting, and a content repository of XML versions of our books and magazines. We then converted our back catalog and front list into XML, and we integrated our Microsoft Word and InDesign content into XML as well. We added XML format transformations that converted our XML into multiple “flavors” of HTML, PDF, and EPUB. We developed a master taxonomy of training terms and applied that taxonomy to our content down to the article level (for our magazines) and to the chapter level (for our books). We also released this taxonomy for the benefit of the training profession. Finally, with all our rich XML content in the repository, we built a user interface to create custom packages of content.

Outcomes

In addition to meeting our goals, we also experienced other, unexpected outcomes:

- Reduced onboarding time. New ASTD employees became “instant experts” in training content because they could instantly find everything we’ve published on a certain topic.
- An integrated language. Our taxonomy is applied across the organization, so how we segment our customers is aligned with how we are segmenting our content.
- Meeting customer expectations. Customers increasingly expect publishers to offer multiple formats to customers. XML-based publishing allows small companies like ASTD to meet those customer expectations in a cost-effective way.
- Agility. With our content already in XML, ASTD is now creating several new (and very cool) content apps. We can concentrate on the app without having to go back and do anything (at all) with the content.

Lessons learned

Start free and small. We started our content management initiative with a company-wide blog. It was a great, stress-free way to get everyone speaking the same language of content management: categories, tags, analytics, search engine optimization (SEO), linking, and findability.

Incentivize the community. ASTD’s certified trainers earn recertification credits for tagging our content to our taxonomy. How can you incentivize your volunteers to help you with your content management needs?

Complexity can kill. ASTD integrated XML into the tools that were already being used: Microsoft Word, Excel, and InDesign. Forcing staff to change tools is the surest way of undermining your unified content strategy!

Anthony Allen, Director of Production, American Society for Training and Development
Summary

Digital publishing is fast becoming a critical requirement for publishers. It’s no longer just a desirable capability; it’s a matter of survival. Most publishers associate digital publishing solely with the production of eBooks and fall short of the mark. The crucial point for publishers today is to prepare their content for multi-channel delivery where printed books and eBooks represent two possible delivery channels.

In a traditional publishing workflow, each book or document is created by one author using some form of text editor or word processor. This document is created, edited, and published as one entity, or possibly as a series of chapters, and doesn’t interact with anything else.

The in-house publishing workflow is very similar to the traditional publishing workflow with the exception of the production of eBooks. Publishers use the same publishing software they use for print to publish to an EPUB file.

Recognizing the challenges they face in publishing to multiple channels and the proliferation of devices, some publishers are choosing to use XML in their publishing workflow. “XML early” means converting your content into XML early on in your workflow to enable you to produce content for multiple channels and to easily reuse content.

To take advantage of new digital markets, you must reengineer your processes to create a more flexible and sustainable future. This requires a unified content strategy.

More information on the effective design and creation of eBooks can be found in eBooks 101: The Digital Content Strategy for Reaching Customers Anywhere, Anytime, on Any Device, by Ann Rockley and Charles Cooper.
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