How Should You Manage Content within Your Enterprise?
Seven Key Issues that Are Critical to Success

By Patricia B. Seybold and Geoffrey E. Bock
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January 30, 2003

NETTING IT OUT

Don’t think of content management as an IT project. Think of it as a core competency that you need to evolve and instill across your organization.

What’s the best way to define the roles and responsibilities for implementing your new content management processes? We believe you’ll need a core content management team headed by a high-level executive.

Your operating business units should maintain day-to-day responsibility for originating, aggregating, organizing, producing, and distributing content to achieve their specific business objectives. A distributed content management task force should be responsible for helping to determine the needed content-related business processes, templates, and categorization. The IT organization should be responsible for managing the technology-related resources that support these processes and for defining and implementing the content-specific systems’ architecture.

We’ve identified seven critical issues that seem to be plaguing today’s content management project teams. And we offer some tips to help you deal with each of these issues.

DEALING WITH THE CONTENT CONDUNDRUM

Critical Issues for Enterprise Content Management Initiatives

We’ve worked with quite a number of project teams that have been given the responsibility for revamping their organization’s content management on an enterprise basis. The good news is that lots of companies are waking up to the need to make content management much more strategic. The bad news is that there is still a fair amount of mystery about how to really carry out an enterprise-wide content management initiative.

We’ve identified seven major areas of confusion and pain among the folks with whom we’ve talked and worked:

1. **ORGANIZATIONAL STRUCTURE.** Where does the “content organization” sit? Does there need to be one? If so, to whom does it report? What roles would you need on the team? Is this a technology initiative or an ongoing corporate function?

2. **SCOPE.** What should be the purview of this initiative? Web content, product information, intranet content, marketing communications, policies, technical documentation, price lists...? Globally or by country? By business unit or across business units?

3. **INTERDEPENDENCIES.** How does this content management initiative interrelate with your portal projects, your e-commerce activities, your customer support activities, your CRM activi-
ties, your intranet, your contact centers, your channel partners, and your supply chain efforts?

4. DISTRIBUTED AND CENTRALIZED CONTROL. How do you enable widely-distributed and -distributed content owners to make the continuous updates and changes they need to, yet maintain centralized control over quality, brand, consistency, and auditability?

5. WORKFLOW DESIGN AND IMPLEMENTATION. How do you design all the necessary document (editorial and production) workflows without creating what one client referred to as a “procrustean bed” of cumbersome, and, therefore, oft-ignored, processes?

6. CATEGORIZING CONTENT. How should you handle taxonomies, tagging, and appropriate categorization of content so that specific information is easy to find?

7. CROSS MEDIA “PUBLISHING.” How do you ensure that you aren’t duplicating efforts as you produce and distribute content for your Internet environment (intranet, extranet, internet, portals), for your print environment (catalogs, point-of-sale, direct mail), and for your disparate touchpoints (contact center scripts, customer support FAQs, configurators, trouble-shooting tools, design tools, bills-of-materials)?

ORGANIZATIONAL STRUCTURE

Where does the “content organization” sit? Does there need to be one? If so, to whom does it report? What roles would you need on the team? Is this a technology initiative or an ongoing corporate function?

You Need a Core Content Management Team

In order to be successful in implementing and refining enterprise content management over time, you should have a dedicated core team of experienced business and technology leaders to oversee and to evolve the content management strategy for your organization. This team is typically housed within the Internet/intranet and/or catalog publishing area of the company.

Ideally, your content management team should not report to the IT department, but they should coordinate closely with IT.

Unfortunately, this is not the way most companies set up their content management initiatives. Many firms handle content management as an IT project, with an IT project manager as leader. This is the wrong way to go about it because, like your CRM initiative, enterprise content management doesn’t go away. It’s a permanent part of your organizational infrastructure. And it needs permanent governance and purview.

Of course, IT should install, integrate, and deploy the content management system—the products that you buy. IT is also a key recommender in the selection of these products. But the responsibility for the design, the priorities, the workflows, and the evolution of your firm’s content management strategy should not be an IT function.

Use a Matrix Management Approach for Content Management

You’ll want to have a core content management organization with distributed members who have a dual reporting relationship. Think of these distributed team members as a content management task force. Distributed content team members should report both to the core content management organization and to the business department in which they’re housed.

Organizational roles and responsibilities for enterprise content management span multiple groups.

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And it needs permanent governance and purview.
and departments within your firm. Your content creators, editors, reviewers, and publishers work within your marketing department, your engineering teams, or your customer service organization. So you’ll need to distribute day-to-day content management responsibilities to your operating business units. Your distributed content management task-force can coordinate and execute these ongoing activities.

Depending on your company and your industry, you may “house” your core content management team in your marketing area, in your Internet operation, in your product support organization, and/or in your publications or catalog group.

To Whom Should Your Core Content Team Report?

You’ll want to centralize and coordinate the initiatives for managing your content across your enterprise. You’ll need to distribute day-to-day content management responsibilities to your operating business units while maintaining the strategy and the game plan centrally. You’ll want to have the clout to coordinate and prioritize content management efforts across business units.

Most important, your content management environment needs to be aligned with your overall company-wide business goals and objectives—both in terms of ongoing operations and long-term strategic objectives.

Is There a Case for a Chief Content Officer?

Because enterprise content management is, by its very nature, a distributed responsibility, we believe that enterprise content management merits an executive-level role—perhaps designated as a Chief Content Officer (CCO)—within an organization. This person works in parallel with other senior managers, such as a Chief Marketing Officer, a CIO, and a Customer Experience Officer, on mission-critical business objectives. You may need a separate CCO, or you may assign that role to your CIO, your Customer Experience Officer, or, if you still have one, your Chief Knowledge Officer.

Content Management Impacts the Quality of Customer Experience℠

We strongly recommend that you have your core content management team report to your Customer Experience Officer and/or Customer Advocacy EVP. Not all content is customer-impacting. But by focusing first on fixing customer-critical content, you’ll gain traction, momentum, and clout!

When you are trying to change organizational behavior, it’s always easiest to work from the customer back. Doing what’s right for the customer breaks through organizational inertia faster than any other strategic imperative.

Responsibilities of the Content Chief?

What would the Chief Content Officer (or the person taking on that role) be responsible for? This is the “buck stops here” person who is measured on the consistency, quality, timeliness, lack of duplication, and legal compliance in your organization’s “unstructured” information. She would plan and execute the process of digitizing your organization’s information and workflows. He could measure his success by the rate with which the company’s information assets are digitized, structured, and categorized; the ease with which accurate information can be found; and the elimination of duplicate, redundant, erroneous, and conflicting information.

At the end of the day, enterprise content is a company asset, just like company financials, company brands, or customer experiences, and needs to be managed in a similarly systematic fashion.

Roles to Include on Your Content Management Team

There’s actually quite a large set of competencies that are vital to success in implementing enterprise content management successfully. Depending on your circumstances, some of these roles should be
members of your full-time core content management team; other roles may be fulfilled by having the right people on your cross-functional/cross-organizational task force. Such a task force would ideally be an extension of the core team and would meet on a regular (weekly or monthly) basis to work on content-related issues that cross organizational boundaries.

**PATTY’S “DREAM TEAM” FOR ENTERPRISE CONTENT MANAGEMENT.** Here’s a list of roles that Patty Seybold recommends that you consider including either on your core team or on your cross-departmental task force:

- **Editor** (with publishing experience)—editors understand the editorial process and workflows required to move content through review and sign off.
- **Merchandiser** (with catalog experience)—even if you don’t sell direct, you have products. Merchandisers understand how to present decision-making information about products.
- **Customer Support Professional** (with online & contact center experience).
- **Technical Documentation Expert** (with print & online experience).
- **Web Usability Expert**—in charge of optimizing search/navigation.
- **Librarian**—to maintain/create taxonomies, vocabularies, thesauri.
- **Subject Matter Expert(s)**—to optimize taxonomy/classification.
- **Marketer** (with direct/e-mail marketing experience).
- **Creative/Production professional** (with print & Web experience).
- **Template Designers**—to formalize, design, maintain, and troubleshoot templates for all types of content.
- **Change Management Facilitators**—ideally with training in Customer Scenario® Mapping.
- **Database Designer(s).**
- **Technical Architect**—Application Integration expert.

As you can see, we believe that there are a lot of core competencies that you really need to consider and involve when tackling content management. Use this list as a sanity check.

Your core content management team will determine the requirements for the underlying technology that you’ll need to support enterprise content management.

The core content management team should work with your strategic business partners, such as suppliers and distributors, both to specify and to gather requirements for structuring content. You should drive these efforts by starting with the information needs of your mutual end-customers.

**The Role of Your IT Organization in Your Content Management Initiative**

Your IT staff provides the technical resources for designing and deploying whatever enterprise content management system you choose to adopt. This group supports the technical requirements behind your content management initiative.

Your IT staff provides the technical expertise and organizational leadership for launching and maintaining your enterprise content management environment.

**APPLICATION SERVICES REQUIRED TO SUPPORT CONTENT MANAGEMENT.** Your IT organization is also responsible for rationalizing and supporting a set of application-level services that will be needed to support content management. These services may be bundled into one or more
content management applications, or they may be services that are part of some other solution your firm has bought or built.

Examples of the kinds of application services you’ll need to support content management include:

- Search
- Categorization
- Meta-Tagging
- Taxonomy Management
- Information Mapping
- Workflow
- Approval Routing
- Alerting
- Time/Date Stamping
- Version Control
- Translation
- Annotation
- Collaboration
- Auditing
- Composition/Rendering

Your IT group also needs to define the methods and mechanisms for linking content elements to related enterprise applications. For example, product descriptions will need to be linked to inventory, order entry, and pricing. Your IT group needs to specify the logical structure for your underlying databases and to determine the related models and methods for how content is stored, secured, and retrieved.

Finally your IT group needs to use the essential systems-level services required to support your content management initiative. Security is a major concern. Wherever possible, you should rely on an enterprise directory services for managing access control, authentication, authorization, and workgroup definitions within your content management applications.

**SUPPORT CONTENT-CENTRIC BUSINESS PROCESSES WITH COMMON SERVICES.** Of course, your IT staff members can’t define a content-centric systems architecture in a vacuum. They’ll need to collaborate with the core content management team and with the operational groups within your various business units to discover, describe, and to map out the key editorial and production workflows. It’s their job to supply the services that will support these workflows and to do so in a manner that re-uses as many common services as possible across the organization.

**KEEPING THE SCOPE MANAGEABLE**

What should be the purview of your content management initiative? Web content, product information, Intranet content, marketing communications, policies, technical documentation, price lists…? Globally or by country? By business unit or cross business units?

To a large extent, how you scope your content management initiative could determine its organizational structure. But we believe that would be a mistake. If you define your content management initiative based on the delivery mechanism (e.g., Internet vs. print catalog), and/or the business function (e.g., marketing vs. customer support), and/or the business unit, and/or geography, you’ll miss the opportunity to evolve and to leverage a core set of underlying and re-usable content management services.

After all, how many different services do you want to be using to handle core functions, such as editorial workflows, version control, archiving, access control, and meta-tagging?

**SCOPE EACH CONTENT PROJECT AROUND END-USERS’ TASKS.** Yet, you still need to have a very focused and easy-to-implement scope for each of your enterprise content management projects. We recommend that you define your scope, not based on information delivery channels, but rather by focusing on the kinds of content that is most critical for critical tasks in stakeholder’ scenarios. For example, you might consider the following kinds of projects:

- Decision-making content to support a purchase (e.g., sales & marketing content)
- Customer support-related content
- Break/fix-related content
- New hire-related content
• Maintenance-related content
• New product training-related content

HANDLING INTERDEPENDENCIES

How should your content management initiative interrelate with your portal projects, your e-commerce activities, your customer support activities, your CRM activities, your intranet, your contact centers, your channel partners, and your supply chain efforts?

Even if you narrow your scope for each content management project to a finite set of information, you’ll want to leverage the learning, key services, processes, and technology infrastructure as broadly as possible. One way to be sure that you spot interdependencies early is to map out key stakeholder—customer, partner, supplier, employee—scenarios. Identify which content is critical. Identify which attributes or metadata are required in the context of the scenarios, and identify the key application and infrastructure services you’ll need for each. Then step back and look at those services across scenarios.

As you work on each individual project—e.g., improving the effectiveness of search for customer support information, you can leverage that work for other still-to-be tackled projects—e.g., improving the effectiveness of search for new hires seeking company benefit information.

We recommend using our Customer Scenario® Mapping methodology as a first step. You’d begin by identifying the key scenarios and outcomes each group of stakeholders needs to achieve. Next, you trace the individual tasks the customer wants to perform to achieve the specific outcome. As you describe these steps, you also determine the required information resources, the attributes that matter most to the customer at each stage, and the services and processes required to deliver them. The end result is a detailed definition of the content required to support your customers’ key business processes, defined from your each of your customers’ (and other stakeholders’) perspectives.

DISTRIBUTED & CENTRALIZED CONTROL

CREATING AND DISTRIBUTING CONTENT SHOULD REMAIN A LINE-MANAGEMENT FUNCTION. People within your business units are already producing information for internal or external distribution. They should continue to do their jobs. You should seek to implement seamless, end-to-end business processes across the content management lifecycle. Your job is to ensure that your content originators, editors, reviewers, and approvers have access to the necessary tools and technologies to create and to organize digitized content. You’ll also need to ensure that other staff members within your business units have the appropriate resources to produce and deliver this content, as needed, to various Web sites, portals, e-business applications, third-party repositories, and hard copy.

DON’T REQUIRE CONTENT CREATORS TO USE A NEW TOOL! Any content management product or solution you implement should ensure that your staff members continue to do their jobs using tools with which they are familiar.

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Supporting Editorial Tasks and Activities

From the perspective of your content originators, editors, reviewers, and approvers, there are four issues to consider: 1) how your staff uses templates
and the supporting applications, 2) how your staff uses a shared repository, 3) how you design adaptive workflows, and 4) what plans you make for content archiving. Since workflow design and evolution is an area of a great deal of pain, we’ll address workflow in a separate section, below.

**PROVIDE TEMPLATES WHICH MAKE IT THE PATH OF LEAST RESISTANCE TO CREATE WELL-MANAGED CONTENT.** Whatever type of content you are creating, if it is to be shared and/or “published” (on the intranet, extranet, Internet or in print), you’ll want creators and editors to begin adhering to guidelines in creating, tagging, and posting these documents for others to review and to access. The best and easiest way to do this is to begin to develop templates with an appropriate set of choices that end-users select among before filing the to-be-shared document. Some of these can be pre-filled-in—e.g., creation date, author, etc. Other information should be selectable from a small set of drop-down choices. Maintaining and evolving these templates and their associated workflows should be a joint and proactive effort among your core content management team, your distributed content management task force, and the business end-users/content owners.

**PROVIDE DIRECT ACCESS TO A SHARED REPOSITORY.** The creative professionals within your organization should be able to add content to a managed repository or to edit content stored within this repository as ordinary filing operations. They should always be able to access the managed content in its native file formats. Thus, content originators, editors, reviewers, and approvers should be able to continue to use their popular desktop tools and Web-centric services (such as Microsoft Office applications, Adobe Photoshop, Macromedia Dreamweaver, Lotus Notes, and so forth).

**PLAN FOR CONTENT ARCHIVING.** As you create and organize your content for electronic distribution and/or print dissemination, identify how you plan to age and archive it at some point in the future. You should link your archiving policies and activities to your overall business processes and standard operating procedures.

For instance, you may want to maintain an environment where all company announcements remain available online. Often, companies create a library of their official press releases, organized by date, which business writers and analysts can easily search. Alternatively, you may want to link the availability of content to specific business events. For example, when your company sunsets (and stops selling) a particular product, the product data sheets and other marketing collateral are automatically removed from direct distribution of current product information. (If need be, this information might be moved to some kind of interactive archive.)

Where possible, you should identify the explicit criteria for aging content—such as date published, business events, or being superseded by new information. You should make content archiving decisions by design, on the basis of defined business policies and business rules.

**WORKFLOW DESIGN & IMPLEMENTATION**

You already have workflows in place. Don’t try to super-impose new workflows; just evolve your existing workflows. You and your staff already produce content for your customers, business partners, and employees as an integral part of your ongoing business operations. Sometimes, you’re involved in a defined set of business processes for creating and distributing content. Other times, the content you produce is an artifact of specific business activities. Regardless, you should be able to identify the formal steps as well as the ad hoc activities required to produce and to publish the required business information.

For instance, your product marketing managers routinely develop product brochures and other collateral whenever you ship a new product. Your product managers and developers review these
documents for completeness and accuracy. Your sales support managers and field marketing personnel also review the content to ensure that the publications address the relevant sales and marketing issues. When all the reviews are complete, your product marketing executive approves the final draft. Your copy editor then edits the finalized text and makes sure that the grammar is correct. Your branding manager provides the logos and illustrations to reinforce your corporate identity. Graphic designers in your production department add the visual elements and produce the finished document. At each step, a product marketing manager within an operating business unit owns the process for producing and delivering the content as an integral part of her job responsibilities.

Alternatively, the employee benefits coordinator within your human resources department manages your company’s employee benefits program. Among his other responsibilities, he develops and maintains a data sheet summarizing current employee benefits. He passes this datasheet along to your company recruiters, which they then distribute to prospective employees. As content that is an artifact of his job responsibilities, the benefits coordinator routinely updates and redistributes this datasheet whenever your company’s benefit policies change.

**MAKE ALL WORKFLOWS HIGHLY ADAPTIVE.**

The people who review and approve content should begin to rely on more explicit pre-defined workflows to do their jobs. These people expect to have the appropriate access rights and permissions to open the items they need to read, view, or hear, then add their revisions and comments, indicate their approval (as required), and send the content on its way. Your workflow definitions should make all of these individual tasks appear as a seamless business process.

Moreover, ensure that these workflows are flexible and adaptable. They will likely change in light of your staff members’ experiences. Choose an enterprise content management system that lets users rapidly adapt their workflows to changing situations.

We would recommend that you start by capturing your basic editorial workflows—making the implicit explicit—and then build more sophisticated routing and approval workflows over time. Your business staff will most likely have their own ideas about how best to organize these business processes. Expect to capture and incorporate their insights on an ongoing basis.

**Avoid These Pitfalls**

There are some “worst practices” we’ve witnessed in content management initiatives that are floundering. Here are the antidotes we recommend that will help you avoid the most common pitfalls:

- **Don’t superimpose content management workflow controls where none existed previously.** That’s a recipe for disaster. Start by taking your implicit workflows and making them more explicit. Improve upon them as you do so. Have the people who do the process be the ones to design and refine their own workflows.

- **Don’t impose non-iterative, one-way workflows.** All editorial/production workflows are iterative and recursive. Build iteration into every step.

- **Do provide fast-path alternatives.** Every workflow needs a “fast-path”—steps you can skip in certain contexts, as well as a mechanism for fixing problems that arise from “fast-pathing.”

- **Don’t create bottlenecks.** Sign-offs, categorization, and usability testing are important. But you can’t create gatekeepers who become bottlenecks, adding additional time to the process of providing up-to-date information to those who need it.

- **Don’t let distributed users make uncontrolled changes to “published” material.** Always be sure that there’s someone who “owns” the quality and consistency of each type of information that’s to be shared or “published.” It’s that person’s responsibility to either sign-off and/or to establish trust and procedures to ensure the in-
tegrity, accuracy, and consistency of the information.

- Don’t allow multiple copies of the “truth” to flourish. You do need to set up processes and procedures to avoid having redundant, duplicate versions of the same documents randomly scattered throughout your organization. There should be one “sanctioned” version of each approved information object. Each information object needs an owner who is responsible for its accuracy.

CATEGORIZING CONTENT

How do you ensure that people can find what they’re looking for? You’ll want to explicitly categorize and tag content, so that search engines will yield effective results, and so that end-users who are browsing, or those who opt to navigate a hierarchy (online or in print), or those who search by entering a parameter-based query, will quickly find the results they’re seeking. Even with today’s automatic clustering and categorization tools, there’s no substitute for human intervention and review.

Invest the time and resources to organize and to categorize the various kinds of content that you are distributing. Allocate staff resources for updating these categories on an ongoing basis.

Lots of project teams get paralyzed by the notion of creating taxonomies, controlled vocabularies, or other kinds of metadata. Don’t think of categorizing and meta-tagging content as a really big deal. Think of it as an evolutionary process. You already categorize the content you produce in a number of different ways. Sometimes these categories are artifacts of managing the content itself. For instance, you might automatically collect the names of the individuals who originate particular documents, the office locations where they work, and the dates last modified. On other occasions, these categories are related to the particular business activities and events that your content management environment is designed to support. For example, your company’s product data sheets customarily include specific product names, model numbers, short descriptions, and other identifying characteristics.

Categorizing content within your content management environment—identifying and developing the basic categories—requires time, planning, and design. You need to determine not only what kinds of content you are collecting. You also have to develop an understanding about how the content is used as well as how categories evolve over time.

Determine Explicit Descriptions

Begin with the description of things within the purview of your current content management initiative. Focus on categorizing and structuring the information attributes that matter most to the people who actually consume the information. Categories about your firm’s product information, for example, include the product names, part numbers, and brief product descriptions, as well as complimentary products, and/or substitute products. Material safety data sheets add the lists of hazardous materials and other safety criteria related to particular products. Reports and reviews about your company’s products include their titles, authors, publication dates, source, and topic areas. Depending on their context, topic areas, in turn, can be related to particular technical specialties or to business functions.

Where possible, you should consider using externally defined categories specified by authoritative sources. For example, the Occupational Safety and Health Administration (OSHA) maintains a standard taxonomy of hazardous substances and workplace injuries, useful when categorizing material safety data sheets. You then need to adapt the authoritative source to your company’s business objectives. For instance, if your firm produces electronic devices for the consumer marketplace, you are not interested in workplace hazards within the oil and gas industry.

Identify Semantic Relationships from Multiple Perspectives

Particularly in an electronic environment, you can maintain multiple categorization criteria that describe (and embed) semantic relationships. These
criteria include controlled vocabularies based on synonym lists, external authorities, or thesauri of related terms:

- A synonym list specifies equivalent terms. For instance a “personal computer” is a synonym for a “PC device.”

- Authority files are lists of preferred terms or acceptable values, determined by an external authority. For instance the U.S. Postal Service determines the two letter abbreviations for all 50 states.

- A thesaurus of related terms adds an information hierarchy to the controlled vocabulary. You can create a thesaurus by defining broader and narrower terms. For instance, “computer system” is a broader type of “personal computer.” Similarly, “PC notebooks,” “PC tablets,” and “multimedia desktop workstations” are narrower definitions of a “personal computer.”

Furthermore, beyond explicit definitions, you can also create semantic relationships based on your understanding of information users’ contexts. For instance, as you map your customer scenarios, you can determine the specific customer-centric steps in the underlying process. You can identify the individual terms that people use to describe the steps in the process. You can then map these terms into an information taxonomy which describes hierarchical, parallel, and associative relationships.

Above all, monitor the search terms and navigation paths people use to find what they’re seeking. The search terms people use will tell you how to evolve your synonyms and your thesaurus.

**Plan for Continuous Change and Evolution**

Particularly when managing content within a dynamic business environment, don’t expect the content categories to remain static. Rather, you need to plan to continually enhance and evolve your content categories in light of changing situations and your customers’ experiences.

You need to ensure that you have a change control process in place for managing your content categories and for updating how they are used within your enterprise content management environment. We would recommend that you assign one or more staff members the role of serving as the organization’s taxonomist, in charge of creating and maintaining your content categories, and then introducing updates on a periodic basis. Taxonomies are domain-specific. You’ll need subject-matter experts for each domain.

In summary, here are some specific tips to think about when you’re developing your categorization strategy:

- Use Customer Scenarios® to identify information attributes that are critical in the specific contexts in which end-users’ find themselves.

- Drive keyword/meta-tagging from customers’ search and navigation behavior.

- For product-related or domain-specific info, don’t neglect catalog-style taxonomies.

- Don’t assume that users will stay in a single context e.g., sales, support, marketing, technical information. Do assume that they’ll hop across contexts.

- Do your meta-tagging twice: during the creation stage and, again, during the production process.

- Supplement tagging and search with clustering/discovery using automated tools.

- Cross-reference and link aggressively.

**CROSS-MEDIA “PUBLISHING”**

Many enterprise content management initiatives fail because they are too focused on one form of media—producing print catalogs or creating and revising copy for a Web site or portal. It’s imperative to think about content as cross-media from the outset. Don’t forget your contact center scripts, your software simulations, your training videos, and the CDs...
you send out with your updated price lists. You want your enterprise content management vision to encompass all forms of information in any media. And you’ll want to use digital and electronic versions of your information as the design center, moving to print and/or other formats as a secondary process.

No matter what form of information you’re producing, you’ll be using the same content management lifecycle—create, compose/stage, produce/deliver, and age¹. (See Illustration 1.) You certainly will need different variants of the content to be optimized for different media and delivery vehicles. But that’s the beauty of XML. If you tag your content appropriately in XML and think carefully about the different requirements for the structure and presentation of information in different media, you’ll find that it becomes much easier to re-purpose information across media.

CONCLUSION: HOW TO GET THERE?

You’ve probably already embarked on an IT-led enterprise content management initiative. That’s okay. Your next step is to migrate this IT-funded project to a more permanent home. Here’s a summary of the approach we recommend:

1. Find a permanent “home” for your core content management team and a high-level exec who is willing and able to take on the role of “chief content officer.” We recommend that this group be housed in the area of your company that tends to lead most of its successful transformations—a customer experience or customer advocacy

group would be ideal, but only if it has clout within your organization.

2. Establish a cross-functional content management task-force. Its members should be embedded in each of the content-producing departments within your firm. In fact, they may have been part of the cross-functional team that gathered content management requirements. But now they also need to assume responsibility for shepherding your organization into the digital age by planning and executing a well-managed, coordinated assault on all the different types of currently-unstructured content that has proliferated over the years.

3. Once you have your core team and your distributed task force in mind, check their areas of expertise against the roles we’ve recommended (see Patty’s Dream Team for Enterprise Content Management, above), and add any roles that are missing to either the core team or to your distributed task force.

4. If you haven’t already done so, map out your key stakeholders’ (customers, partners, employees, regulators, etc.) most critical scenarios, in order to identify and to prioritize the types of content that impact those stakeholders’ ability to get things done.

5. Use these key scenarios to identify the core application services that can be re-used and leveraged across departments and initiatives. Then coordinate applications services re-use.

6. Start to formalize, streamline, and support the editorial and production workflows that are required to “publish” different kinds of content. Don’t neglect to support ad hoc adaptation, “fast-pathing,” and iteration. Provide easy-to-use templates and other tools to make it the path of least resistance for content creators, reviewers, editors, and producers.

7. Create a competency in content categorization and establish an ongoing, distributed mechanism for evolving and refining content tagging, taxonomies, and synonyms. Create a competency in content categorization and establish an ongoing, distributed mechanism for evolving and refining content tagging, taxonomies, and synonyms. Monitor what users do as they search for and use information to make decisions and to accomplish their tasks. Employ subject matter experts in each domain or discipline whose job it is to continuously evolve your content categorization.