

Managing Requirements for a New Content Strategy

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What We'll Cover

- ▶ Planning requirements in the context of organizational strategy
- ▶ Creating requirements
- ▶ Managing and evaluating responses
- ▶ Testing and implementing a new content strategy
- ▶ Please ask questions any time.



About John Hawkins

- ▶ Knowledge Management consultant for SDI Global Solutions
- ▶ Provider of knowledge management solutions
- ▶ Work with clients to develop knowledge management requirements and provide solutions
- ▶ Also on the receiving end of requirements:
 - Many requirements weight application features over organizational priorities.
 - Many requirements embody abstract principles that may not translate well to real world implementations.
- ▶ I believe that effective solutions begin with good requirements.



What Is a New Content Strategy?

- ▶ A new way of creating, managing, and distributing content
- ▶ Requirements may address large or small aspects of an overarching strategy
- ▶ Example applications within an organizational strategy:
 - New authoring application
 - Incorporating community or user-contributed content
 - Component content management system
 - Content reuse (Single Sourcing)
 - New deliverables (customized views, dynamic content, interactive websites, ...)
- ▶ How does this requirement support your organization's content strategy?
- ▶ How will the proposed application provide value to users?



Influences from Another Realm

- ▶ My approach is influenced by experience on a nonprofit board using the Policy Governance model:
 - What difference does your organization (or your new strategy) make in the world?
 - What benefit, for whom, at what cost?
 - Use "nesting bowls" approach for defining goals (start with very general objectives).
- ▶ Although these principles were developed as guidelines for organizational governance, they are also useful for creating requirements.



Stages of the Process

- 1 Identify the business needs.
- 2 Define broad goals to be accomplished.
- 3 Identify stakeholders and participants.
- 4 Define the scope and timeline for the strategy.
- 5 Analyze existing content resources.
- 6 Create specific requirements.
- 7 Research solutions.
- 8 Identify a short list of possible solutions.
- 9 Test solutions (end to end).
- 10 Implement solution and track performance.



Identifying Business Needs

- ▶ What is your ultimate goal?
- ▶ What are the reasons for considering a change?
 - How well does your current content strategy serve corporate goals?
 - What business goals are impaired by current content limitations?
 - What business needs will be served by a new content strategy?
- ▶ How will the new content strategy fit into the long term strategy of the organization?
- ▶ Identify benefits to customers and internal users.



Stakeholders

- ▶ Who is impacted by the limitations of the current approach?
- ▶ Who will benefit from changes in content strategy?
- ▶ Who will implement changes?
- ▶ Who will be affected by changes?
- ▶ Who will champion this project?
- ▶ Who will need to approve the new strategy?
- ▶ What audiences are served by the organization's content?
- ▶ Who understands current content management processes?



Setting the Scope

- ▶ Is this just for your department or is there a greater organizational need?
- ▶ Issues that may cut across the organization:
 - Duplication of effort and information
 - More collaboration
 - Easier to find knowledge
 - Better branding
 - Faster time to market
- ▶ Who creates and manages content in your organization?
- ▶ Who consumes content?



Establishing a Timeline

- ▶ What is your time frame for the complete project?
- ▶ How important is it to accomplish the project in a specific time?
 - Benefits of new strategy
 - Resources available for implementation
 - Costs of continuing with current approach
- ▶ What factors must be accounted for in the schedule?
 - Release schedules and deliverables
 - Roles and people needed
 - Availability of resources
 - A phased approach?
- ▶ How much total time?
 - Calendar time
 - Person hours



Understanding Your Content Environment

- ▶ What content exists today?
 - Is there duplication?
 - Are there gaps?
 - What can be left behind?
- ▶ What authoring, content management, and knowledge delivery applications are in use?
- ▶ Are some knowledge solutions mandated by corporate policy? If so, do they serve the needs of the entire organization?
- ▶ Who is responsible for content and knowledge in different parts of the organization? For the organization as a whole?
- ▶ What regulatory requirements do you have?
- ▶ How does knowledge flow through the organization? To customers?



Identifying Barriers to Change

- ▶ What are the barriers to change?
 - Lack of organizational support
 - Shortage of resources
 - Costs
 - Cultural factors
- ▶ Who opposes change? Why?
- ▶ What existing applications, systems, and workflow might need to change?
- ▶ What kinds of negative impacts need to be avoided during implementation?



Planning for Metrics

- ▶ Can costs and benefits of a new solution be quantified?
- ▶ Do you have metrics for content creation?
 - Productivity
 - Reuse
- ▶ Document costs of the current approach:
 - Duplication of effort
 - Business impacts
 - Customer support costs
- ▶ Quantify costs and risks:
 - For the current approach
 - For the proposed solution



Creating Requirements

Forming a Team and Creating Requirements



Forming a Team

- ▶ Who needs to approve?
- ▶ Who will be affected?
- ▶ Who needs to be engaged in the process?
 - Business analysts
 - Content creators and managers
 - Publications managers
 - Information technology representatives
- ▶ Limit the size of the team. As needed, have team members represent other interests.



Setting High Level Goals

- ▶ Begin with the big picture.
- ▶ Identify capabilities you need to support high-level goals.
- ▶ Example Goal: Increase productivity.
 - Increase reuse of content to reduce duplication of effort.
 - Reduce need for manual formatting.
 - Remove bottlenecks in workflow.
- ▶ Example Goal: Improve customer experience.
 - Provide content that is appropriate for the user's role and expertise.
 - Reduce customer support calls.
 - Document common problems and solutions.
 - Update and correct content quickly.
- ▶ Application features should be derived from your goals; they are not ends unto themselves.



Elements of Requirements

- ▶ Business goals
- ▶ Functional requirements
- ▶ Platform support
- ▶ User interfaces
- ▶ Workflow & use cases
- ▶ Integration
- ▶ Deliverables
- ▶ Metadata & retrievability
- ▶ Content governance



Creating Specific Requirements

- ▶ Refine general goals and requirements into more specific requirements in stages.
- ▶ Use the "nesting bowls" approach.
 - Start with "big bowls" that define general goals.
 - Define intermediate requirements that support general goals.
 - Detail specific requirements that are needed to realize intermediate requirements.
- ▶ When in doubt, evaluate detailed requirements against general goals.
- ▶ Keep requirements as concise as possible!



Forgetting about Tools

- ▶ Don't start with tools; start with what your organization needs.
- ▶ Make sure your requirements reflect your goals.
- ▶ Avoid requirements that reflect the approach provided by a specific tool.
- ▶ Do not make your requirements feature lists of the applications you know.
- ▶ Be open to new solutions.



Managing Proposals

Communication, Priorities, Outside Help, and Evaluation



Gathering Input and Sharing Results

- ▶ Get continuing input from stakeholders and users.
- ▶ Engage those who will be affected in supporting roles.
- ▶ Assess input against high-level goals.
- ▶ Provide feedback to stakeholders.
- ▶ Resist changes in mission and scope.



Setting Priorities

- ▶ One size does not fit all.
- ▶ Recognize that changes and enhancements come with a cost.
- ▶ Evaluate change requests against project mandate and priorities.
- ▶ Identify budget and schedule impacts.
- ▶ Reframe ongoing enhancement requests as later or side project.
- ▶ Document tradeoffs and educate stakeholders.



Managing Vendors and Consultants

- ▶ Make sure you own your requirements.
- ▶ Have a process and timeline for evaluating possible solutions.
- ▶ Use high-level requirements to pre-screen vendors or consultants.
- ▶ Provide good information about your environment and goals.
- ▶ Focus on your top priorities.
- ▶ Ask questions and evaluate the quality of support provided by vendors.



Mapping Requirements to Solutions

- ▶ Evaluate all requirements against a short list of key requirements that you cannot do without.
- ▶ Create design diagrams to illustrate the workflow you need to achieve and use those in your evaluation.
- ▶ Create models and prototypes to simulate your complete solution.



Analyzing Gaps in Solutions

- ▶ What requirements are difficult to achieve?
- ▶ Are there limits to solutions you are considering?
- ▶ How crucial are gaps?
- ▶ What are tradeoffs between gaps and benefits of different choices?
- ▶ What workarounds can be used to cover gaps?
- ▶ What is the impact of workarounds (time and money)?



Verifying Proposed Solutions

Entry Point, Pilot, End-to-End Evaluation, and Selection



Choosing a Pilot Project

- ▶ Select a pilot project that can deliver value quickly.
- ▶ Identify the audience, set goals, and identify who will benefit.
- ▶ Define the scope:
 - Representative content
 - Fairly complete workflow (including translation?)
 - Small amount of content
 - Short schedule
- ▶ Evaluate solutions against key use cases.
- ▶ If you cannot implement an end-to-end test, how will you evaluate missing steps?
- ▶ Is the solution scalable to a larger implementation?



Solution Elements to Review & Document

- ▶ Software requirements
- ▶ Hardware requirements
- ▶ Implementation and configuration
- ▶ Training & support
- ▶ Short term productivity costs vs. long term gains
- ▶ Risk assessment:
 - For current system
 - For proposed solution



Learning from the Experience of Others

- ▶ Do other parts of your organization have experience with proposed solutions or similar solutions?
- ▶ Are there other organizations or user groups that can provide feedback?
- ▶ For those who will need to implement the solution in your organization, have you identified benefits and tradeoffs?
- ▶ Are you prepared to sell the solution to those who will be impacted by it?



Saying "No Thanks"

- ▶ Promptly notify vendors and consultants who were not chosen.
- ▶ Consider soliciting feedback on your process.
- ▶ Keep in mind that you may still be nurturing a future relationship.
- ▶ Say "thank you!"



Saying Yes

- ▶ Be clear about who is responsible for what:
 - What elements handled by solution provider(s)?
 - What needs to be provided by your organization to support the effort?
- ▶ Have you included all the elements of the solution?
 - Hardware & software
 - Installation and configuration
 - Training
 - Content migration
 - Transitional costs
 - Impact on schedule and productivity
 - People!



Implementing a Solution

Socialization, Implementation Plan, Staging, and Evaluation



Implementation Plan

- ▶ Complete specifications for the tools and workflow you will implement.
 - Content storage and management (systems and configuration)
 - Authoring tools and requirements, including integration with content management and publishing systems
 - Publishing systems and templates
- ▶ Test plan
- ▶ Staffing plan
- ▶ Schedule
- ▶ Problem solving strategies
- ▶ Key features and tradeoffs



Selling the Solution to Your Colleagues

- ▶ Educate those who will be affected.
- ▶ Articulate benefits and reasons for change.
- ▶ Invest in documentation and training.
- ▶ Identify tradeoffs and explain the reasons.
- ▶ Make the transition a team effort.
- ▶ Reward participation and celebrate milestones.



Staging the Implementation

- ▶ Restrict the initial scope to a well-defined project.
- ▶ Include content conversion early in your planning.
- ▶ Focus on required deliverables and schedule.
- ▶ Prioritize:
 - Which elements are essential to high-level goals?
 - Can you implement individual components of the overall solution and postpone some integration?
- ▶ Track progress and report.



Continuing the Implementation

- ▶ Be prepared to make changes based on the initial rollout.
- ▶ Track and prioritize issues.
- ▶ Define a process for managing ongoing changes.
- ▶ Have a target for retiring older systems.



Evaluating Progress

- ▶ Track benefits and savings.
- ▶ Celebrate milestones.
- ▶ Keep your stakeholders informed.
- ▶ Relate results to organizational goals.
- ▶ Focus on user benefits.



Resources

- ▶ *Managing Enterprise Content: A Unified Content Strategy*, by Ann Rockley with Pamela Kostur and Steve Manning (New Riders, 2003)
- ▶ *Content Management Bible 2nd Edition*, by Bob Boiko (Wiley, 2005)
- ▶ *Content Strategy: The Philosophy of Data*, by Rachel Lovinger (Boxes and Arrows, March 26, 2007; <http://www.boxesandarrows.com/view/content-strategy-the>)
- ▶ *The Discipline of Content Strategy*, by Kristina Halvorson (A List Apart No. 274, December 16, 2008; <http://www.alistapart.com/articles/thedisciplineofcontentstrategy/>)
- ▶ *Boards That Make a Difference: A New Design for Leadership in Nonprofit and Public Organizations*, by John Carver (Jossey-Bass, Inc., Publishers, 1997)

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