

Moving Toward a CONTENT REUSE STRATEGY,

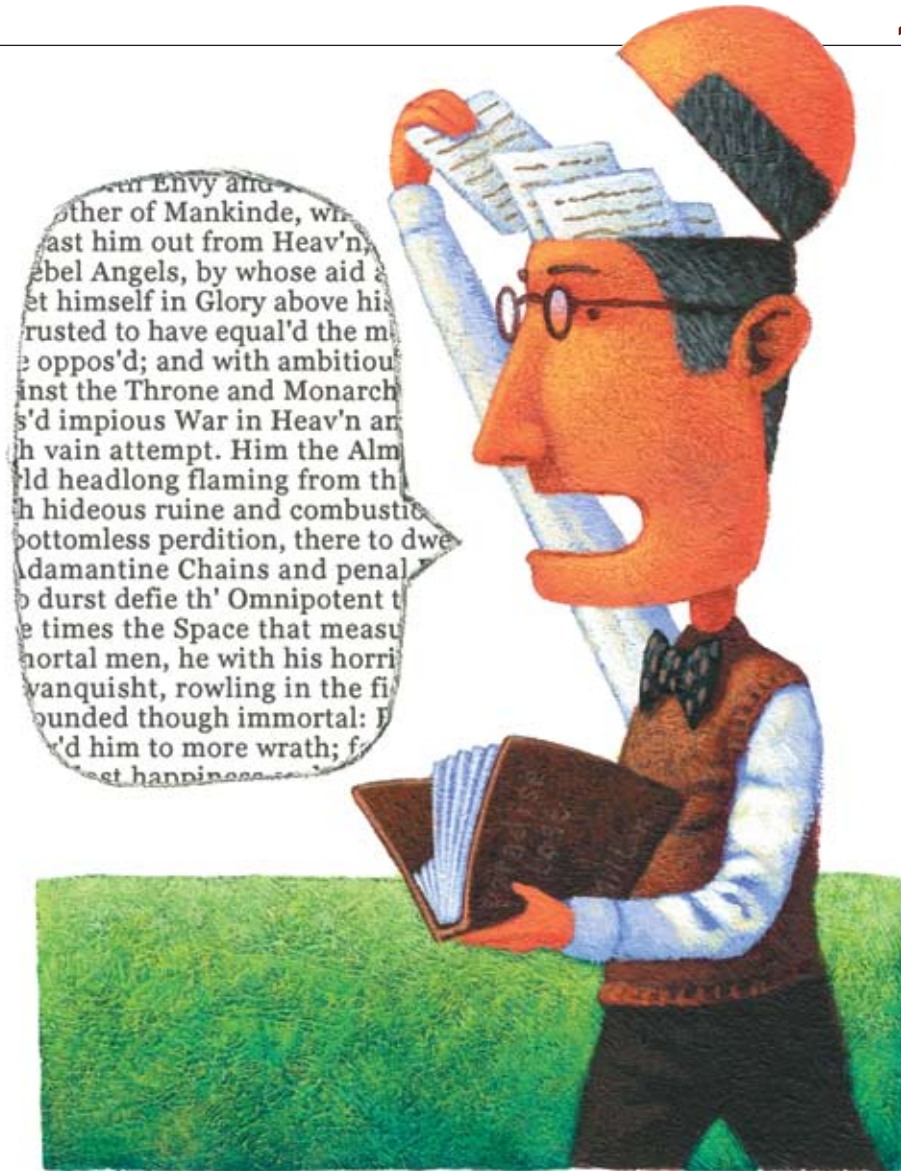
BY JEANETTE P. EVANS, Associate Fellow, AND
JULIANNE K. FORSYTHE, Senior Member

Slowly and Carefully

Are you thinking about moving toward a content reuse strategy? If so, consider our method: We started by selecting a small team to research current trends in content reuse and determine possible applications. From there, we formed task forces to benefit from broad experience as we worked on specific aspects of our proposed strategy. We then began implementing changes slowly to minimize the impact on the department and our ability to meet project deadlines.

Our technical communication group comprises forty-eight members with 14,000 active publications in two major product divisions. The group participating in the content reuse initiative has twenty-four members, including managers, specialists, information architects, editors, and information developers (technical communicators), and produces roughly 400 new or revised publications per year.

Our documentation supports a global company that provides stand-alone industrial components and enterprise-wide integrated systems for customers in a variety of industries, including automotive, food and beverage, oil/gas, life sciences, material handling, and packaging.



Exploring the Possibilities

As the concepts of topic-based authoring, content reuse, and content management started to take hold in the industry several years ago, we began to wonder whether we could use these strategies to more fully leverage our technical content as a business asset. After discussions with management, we were given the green light to form a pilot team to explore the possibilities. Eight people with diverse technical communication backgrounds, including department managers, were selected to develop and execute the project.

The group outlined the following goals for the project:

- Test industry-leading methodology for structuring and chunking content into topics.
- Try new roles different from the current “technical communicator” role.
- Demonstrate a few examples of information reuse and highlight the potential for further repurposing across media types and deliverables.
- Create draft versions of information product models, content models, and topic-based authoring guidelines.
- Drive out technology requirements to support the new methodology.

The four-month project culminated with a presentation to management,

summarizing lessons learned and proposing a plan for the future. The conclusion: in addition to the benefits of content reuse—increased consistency, accuracy, and efficiency—the team envisioned a much larger opportunity in the focused delivery of topic-level information to customers, who rely on our technical content to select, install, configure, use, and maintain our products.

The pilot participants developed a plan and outlined strategies to address critical success factors. One of these strategies included forming task forces to involve the whole department in reshaping our processes.

Working in Task Forces

We organized task forces of six to eight members to work on key aspects of our content reuse strategy. Each task force established a mission statement and deliverables for its area of focus. For several months, the task forces met to complete their deliverables.

• Information Modeling Task Force

This group worked on models that would provide the foundation for moving the group forward into a topic-based authoring environment. They created a library of content types along with information models based on user-needs analysis for our various publication types.

• Process and Workflow Task Force

This group examined current processes and workflows to identify changes required to support our content reuse initiative. They considered the flow of information between people and systems, as well as the product life cycle. The task force created process and workflow diagrams showing the technical communicator’s role in the flow of information through a product life cycle and the required steps to produce information products in this new environment. This helped define new roles to be filled in a topic-based authoring environment.

• Style Task Force

This group created an updated style guide to support topic-based authoring and content reuse and defined the editors’ role and responsibilities. The style guide documented ways to write with a unified voice, to write for online and print deliverables, and to create topics as stand-alone information.

• Tools and Technology Task Force

This group researched potential tools and technologies to support topic-based authoring objectives. They created a requirements document and an evaluation plan to test authoring tools.

Introducing Change

As the individual task forces met their goals and completed their deliverables, we began to introduce pieces of our content

strategy to the department. To start, we held a two-day face-to-face workshop, gathering our people from all locations, to talk about breaking down content creation silos and to promote working together. Additionally, we reorganized the department around the new roles of editor, information developer, information architect, and technology specialist in order to support our evolving content strategy.

Periodic training sessions helped to explain, clarify, and reinforce new content development practices while giving department members an opportunity to voice opinions and discuss the changes. This training included our own topic-based authoring workshop, which introduced new writing standards based on the DITA concept, task, and reference topic types. We also created a topic standards handbook to help information developers put these techniques into practice.

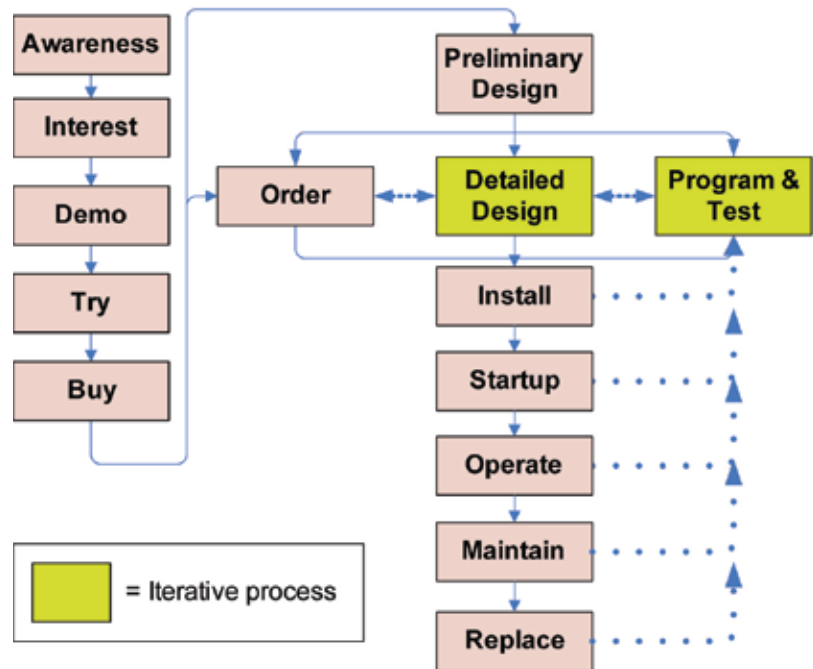
Here are some of the other activities we completed:

- Published an updated style guide to promote consistency in writing style and voice.
- Initiated a controlled vocabulary project to standardize commonly used terms and phrases within our content.
- Introduced a formal editing process with a levels-of-edit approach.
- Conducted a user information life-cycle analysis to guide our ongoing content model development (see Figure 1).
- Released a formal content model for installation instructions, defining optional and required components for a typical publication.
- Introduced new Adobe FrameMaker templates designed to transition information developers toward thinking semantically rather than thinking in terms of formatting.
- Began a pilot program with XML authoring tools and DITA.

Where We Are Now

One of the biggest challenges in this transition has been addressing process changes required to support topic-based authoring. We have to be sensitive to the impact of each new change

Figure 1. User Information Life Cycle



User information life-cycle analysis is a strategic component in planning for topic-based authoring and content reuse strategies. Understanding information requirements at each stage in the customer experience drives out content models and deliverables.

Many organizations can benefit from
implementing a content

REUSE

strategy. You may have done your
research and mapped out a transition
plan, but no matter how thorough you
are, you're bound to run into some
surprises. Moving slowly and carefully
can make the transition smoother.

on our ability to meet project deadlines. Looking forward, we need to consider the conversion of legacy documentation and the impact of that on existing translations. In addition, we face the challenge of managing topics instead of documents. Transitioning from a traditional, book-based approach to topic-

based writing requires many changes. Our near-term goals are to create content models, identify content reuse opportunities, develop a unified writing style and voice, and encourage our information developers to think and write in topics. While making the transition, we've purposely kept a slow pace in order to meet the demands of product releases and tight schedules. ⓘ

Jeanette Evans (jeanette.evans@sbcglobal.net) is an information developer at Rockwell Automation and holds an MS in Technical Communication Management from Mercer University. For the content reuse strategy described here, she was a member of the Style Guide and Process and Workflow task forces and is currently working toward implementing the strategy.

Julianne Forsythe (jfkforsythe@ra.rockwell.com) is a content management specialist at Rockwell Automation, with a BA in Business Administration from Baldwin-Wallace College. For the project described here, she was a member of the pilot team and led the Tools and Technology Task Force; she continues to support implementation of this project.