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FEATURERES

CONTENT STRATEGY

6 So You Want to Be a Content Strategist
By Jack Molisani
The field of technical communication encompasses many fields and areas of necessary practice, with a number of core competencies. Technical communicators should add “content strategist” to the list of potential future positions based on those competencies—and often times are already doing content strategy in their current position without realizing it.

11 A Methodology for Content Strategy
By Rahel Anne Bailie
Content strategists are the management consultants of the content world. But much like a medical school graduate can’t become a doctor without an internship and a residency, Bailie states that a good content strategist needs experience to develop a “gut feeling” both about how things should go and how they should not go.

14 The Importance of Vision in Content Strategy
By Scott Abel
Despite the attention paid to content strategy, we lack a common understanding of the term. Content strategy means different things to different people. Abel provides his definition of the term and then discusses the importance of vision in maintaining your content strategy long-term.

17 The Technology Side of a Content Strategy
By Joe Gollner
At the heart of every content strategy are fundamental decisions about what content should be provided and why. Some of these decisions will take into account questions of technology. With intelligent content becoming more prevalent in content strategy, Gollner suggests paying closer attention to technology.
Did You Miss the Summit?

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Note: **SUMMIT@aClick was included in the full registration fee for the Summit. Attendees should have received an email with username and password.**
Ending the Cold War: How Tech Comm and Marcom Are Both Part of a Successful Content Strategy

By Sarah O’Keefe

Both tech comm and marcom provide information about a company’s products although in different ways and a successful organization needs the best of both worlds. Working together helps provide the best service for customers and potential customers and can increase the bottom line.

Content Marketing and Content Strategy: Making Room for Everyone at the Table

By Robert Rose

Being present at the decision-making place is a psychological sign of achievement as much as a physical one. Rose suggests content marketing and content strategy work together to get a deserved seat at the table.

Defining Content: Going Beyond the Explicit to Find the Implicit Information

By Geoff Hart

The umbrella of content includes many things: large-scale artifacts such as marketing materials and documentation and small-scale artifacts such as email addresses or a PDF file from a client. But that’s explicit information; content also includes intangibles, such as the information about what you do and why you do it, and this implicit information can be just as important.

Telling the Right Story: Proving the Business Value of Content

By Alyson Riley, Andrea L. Ames, and Eileen Jones

What story are you telling your company about the business value of content? The authors take an in-depth look at an IBM study and conclude that our stories need to start including a direct tie to the key performance indicators and metrics that drive the broader business in order to be heard by the right audience.

STC Names “Most Improved Community” and “Community of the Year” Winners

By Nicky Bleiel

Ken Cook and Dan Voss Honored with 2013 President’s Award

By Nicky Bleiel

Pacesetter Awards

By Nicky Bleiel

In Memoriam: George Hoerter, 1932–2013

By Martha Sippel

COLUMNS

Media Matters

By Marc Lee

Social Media Insights

By Rich Maggiani

DEPARTMENTS

FYI

By Mike Unwalla

Mark Your Calendar

By Mike Unwalla

From an Idea to a Product

By Mike Unwalla
A Note from the Guest Editor

“There is a lot more content than there has ever been. The challenge is to be able to create it, find it, manage it, and curate it.”

The above quote is from an analyst at one of the leading business consultancies, who I heard speak during an industry briefing session on the morning of the day I sat down to write this editorial. The timing couldn’t have been better, as I feel it perfectly sums up the themes and ideas expressed in this special content strategy issue of Intercom.

Recent research shows that most companies now realize that great content and authentic engagement is key to success in attracting and retaining customers. Content creation is a top focus for over 50% of industry-leading companies, with content creation and management attracting larger budget share year to year, on average growing at around 9% a year.

To quote from the same analyst again, “The battles for customer attention are being won and lost on content alone. Great content sets the bar and defines leaders.”

Content is what we in the technical communication field are all about. I’d argue that we know content better than anyone. We know how important it is to our companies and, more importantly, what good content means to our customers.

Content strategy is the largest opportunity for technical communicators to prove their worth and value I’ve seen in my 20-plus years in this profession. It’s an opportunity we need to embrace, and I spoke on that very subject at this year’s STC Summit in Atlanta.

For his lead-in article for this issue, Jack Molisani has conducted some revealing original research around how people have developed their skill sets as technical communicators to reposition themselves as content strategists.

The Content Wrangler, Scott Abel, provides some thoughts about the necessity of developing a strategic vision for content strategy, and Rahel Anne Bailie follows up with a great primer on the content strategy methodology she has developed.

As the opening quote illustrated, content management and curation is just as important as content creation when it comes to developing a content strategy. Again, this is an area where we technical communicators have decades of experience and knowledge that we can contribute. I recently heard someone suggest that the IT group is best qualified to handle content management because content is just data. That’s a stance I strongly challenged. To manage content properly, you need to understand content, its complex relationships, and the way that both the enterprise and customers interact with it. Joe Gollner’s article provides an excellent model for considering the technology needs of content management and strategy.
It is probably fair to say that the current interpretation of content strategy has been driven by the emergence of the need for content to drive online marketing. In her article, Sarah O’Keefe looks at how the traditional lines between tech comm and marcom are blurring, and as someone who has straddled both worlds for most of my career, I fully agree with her conclusions.

Rounding out my contributions to this issue is Robert Rose, one of the leading lights of the Content Marketing Institute on what we as a profession contribute to the developing world of content strategy.

My aim in putting editorial for this issue together was to try and develop more than a single issue of a magazine—rather to deliver something more akin to a primer on the emerging field and discipline of content strategy. Thanks to the great contributors, I hope we’ve managed to achieve that; please let us know.

—Alan J. Porter
alan@alanjporter.com

ALAN J. PORTER is an industry leading content strategist and is currently engaged as the content marketing manager for Caterpillar Inc., leading the team to develop and deliver an enterprise-wide content strategy for one of the world’s top 100 brands. For more on his thoughts on content, you can follow his blog at TheContentPool.com, on Twitter @thecontentpool, or read his book (you guessed it) The Content Pool, published by XML Press.

A Note from the Editor

WHAT A FABULOUS issue Guest Editor Alan Porter has put together. I thank him for his efforts on behalf of Intercom and all the authors for their stellar contributions to such an important topic in our field—content strategy.

Just before going to press, I received two unsolicited articles on content strategy that I decided needed to be published in this issue as well, offering additional insights into content strategy and information and knowledge management. One article is by Geoff Hart on implicit information, and the other is by IBMers Alyson Riley, Andrea Ames, and Eileen Jones on storytelling and how it can be used to prove the business value of content.

Riley, Ames, and Jones explain six essential truths about content that echo themes found throughout this issue: 1) content is a challenge; 2) content is an opportunity; 3) the client experience is not limited to the design of the user interface; 4) content is a catalyst; 5) content does not stand alone; and 6) successful products depend upon content. I hope all technical communicators reading this issue, no matter what your specific expertise, will find useful advice and thoughtful discussion from these experts into how to tell better stories about content.

This issue also marks Rich Maggiani’s final column for Social Media Insights. The topic of social media has been a challenge in the four years he’s been a columnist, with all the advancement and change we’ve experienced. Rich, I appreciate your tenacity and valuable contributions to such a moving target. It has been a pleasure working with you.

—Liz Pohland
liz.pohland@stc.org

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So You Want to Be a Content Strategist?

By Jack Molisani | Fellow
“Content strategy is about planning in advance who should be creating what kinds of content and using tools and processes to make sure you’re realizing efficiencies and getting the information to everyone who needs it.”

ONE OF THE MOST INTERESTING aspects of the technical communication field is that “technical communication” encompasses so many fields of practice. I have a session in which I identify the core competencies needed to be a technical communicator, such as critical thinking skills, design skills, project management skills, etc. (for slides to my session, see www.prospringstaffing.com/Resource/Alternate_Career_Paths.pdf).

While you might use some or all of those skills as part of your job, you could easily transition into a job that specializes in one of those skills, such as a business analyst, user interface designer, or project manager. Let’s add content strategist to that list.

**What is Content Strategy?**
Before we dive into how you can transition into content strategy, we should define the term. The component parts are:

- **Content**: The things that are written in a book, magazine, letter, document, etc.
- **Strategy**: The skill of planning how to achieve something, especially in war or business (Macmillan Dictionary)

While one could easily think, “I’ve been doing that for years,” the term wasn’t really recognized as a needed, full-time, specialized skill or profession until content management systems and multichannel publishing gained a foothold in the industry.

For those of you unfamiliar with content management systems (CMSs), multichannel publishing, and content strategy, I offer the following real-world examples.

Take a company like Herbalife that sells hundreds of nutritional products, each of which needs product labeling, marketing collateral, sales brochures, training materials, and the like. Multiply that by the number of publishing channels needed (printed, Web, ebooks, etc.). Then multiply that by the number of platforms used to read that content (laptops, print, mobile devices, etc.). Then multiply that by the number of languages needed to sell those products into more than 80 countries.

It would be impossible to store all that content in individual documents and still be able to effectively author, translate, manage, and publish the information. Instead, such a company would take all the content and put it into a database (a content management system), tag the content with extra information about the content, then publish the content when the consumer wanted it, in the format the consumer wanted it, and in the language the consumer wanted it.

The person who figured out how to import old legacy content into the CMS and how to author, store, and publish new content is a content strategist.

But, wait, there’s more.

**Content Marketing**
Marketing people are always looking for ways to get information about their company and products ranked higher in Internet search engines and reach more customers.
Once most companies learned how to tweak metatags (search engine optimization) on their websites, there was this huge, fundamental discovery of what makes websites valuable to the consumer—content.

While we have known this for years (after all, it’s the very core of what we do as professional communicators), the phrase “content is king” finally hit home and companies began to fund content development as a marketing tool (content marketing), and to also realize they needed a content strategy to accomplish it. This, however, is where the marketing and tech comm paths diverged.

For years now, all marketing has been concerned with was publishing website content. We, the tech comm professionals, had to tackle website content and user manuals and training guides and how-to videos and all the other flavors of professional communications—and make them readable on a computer screen and a cell phone and a mobile device—in 25 languages!

In other words (as a simplification), tech comm departments looked to content strategists to figure out how to import legacy content, how to tag it with metadata, and to publish it. While marketing, in turn, looked to content strategists to decide what content to leave in, what to leave out, and when and where to publish it. Yet both camps call the work content strategy.

A Unified Content Strategy
In their book, Managing Enterprise Content: A Unified Content Strategy, Ann Rockley and Charles Cooper discuss the liabilities of having content kept in “silos” (business units that don’t share information) and what that’s costing companies. They offer that it is possible to create a content strategy that spans marketing and technical publications, a “unified content strategy” that includes any business unit that might need a hand in the content development game. Unfortunately, most companies don’t have a unified content strategy, so we’re back to “us” and “them.”

You Want to be a Content Strategist? What Kind?
Before I start discussing how to become a content strategist, let me repeat that content strategy means different things to different people, depending on where you are in the organization. Also keep in mind that you may take a content strategist job only to find out that the position is more about managing cross-silo politics than it is metatags and CMSs.

If I haven’t scared you away yet (and I tried my best), let’s look at how other people have made the transition into content strategy and what their jobs entail.

Transitioning into Content Strategy
To find out how people who are working in content strategy got into those jobs, I created a survey and posted it to several content-strategy-related groups on the Internet (LinkedIn groups, MeetUp groups, Facebook groups, etc.). I received about 100 self-selected responses with the following results.
Having unified content strategy reduces duplication of effort and enables companies to respond to market changes and manage the customer total information experience.

4. Does your company recognize “content strategist” as a role, or is it just something you do as part of your job?

<table>
<thead>
<tr>
<th>Role</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content strategist is recognized as a role</td>
<td>41.7%</td>
</tr>
<tr>
<td>It’s just something I do as part of my job</td>
<td>58.3%</td>
</tr>
</tbody>
</table>

5. What is the job title for your current position?

“Content strategist” was 17% of the responses.

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Developer</td>
<td></td>
</tr>
<tr>
<td>Architect</td>
<td></td>
</tr>
<tr>
<td>Assistant Professor</td>
<td></td>
</tr>
<tr>
<td>Associate Communications Officer</td>
<td></td>
</tr>
<tr>
<td>Associate Creative Director</td>
<td></td>
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<tr>
<td>Associate Manager</td>
<td></td>
</tr>
<tr>
<td>B2B Marketing Strategist</td>
<td></td>
</tr>
<tr>
<td>Business lead, employee portal Communications &amp; Design Specialist</td>
<td></td>
</tr>
<tr>
<td>Communications and Content Editor</td>
<td></td>
</tr>
<tr>
<td>Consultant (x2)</td>
<td></td>
</tr>
<tr>
<td>Consultant, Web Content Strategist</td>
<td></td>
</tr>
<tr>
<td>Content Administrator</td>
<td></td>
</tr>
<tr>
<td>Content Manager</td>
<td></td>
</tr>
<tr>
<td>Content Marketing Manager</td>
<td></td>
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<tr>
<td>Content Project Manager</td>
<td></td>
</tr>
<tr>
<td>Content Quality Analyst (x2)</td>
<td></td>
</tr>
<tr>
<td>Content Strategist and Authoring SME</td>
<td></td>
</tr>
<tr>
<td>Content Strategist/Communications Specialist</td>
<td></td>
</tr>
<tr>
<td>Content Strategy Consultant</td>
<td></td>
</tr>
<tr>
<td>Content Strategy Manager</td>
<td></td>
</tr>
<tr>
<td>Creative Content Writer</td>
<td></td>
</tr>
<tr>
<td>Delivery Specialist</td>
<td></td>
</tr>
<tr>
<td>Director of Content Marketing and Strategy</td>
<td></td>
</tr>
<tr>
<td>Director of Content Strategy</td>
<td></td>
</tr>
<tr>
<td>Director of Social Media</td>
<td></td>
</tr>
<tr>
<td>Director Operations, Technical Documentation Director, Program Design and Training</td>
<td></td>
</tr>
<tr>
<td>Documentation manager</td>
<td></td>
</tr>
<tr>
<td>Documentation Team Manager</td>
<td></td>
</tr>
<tr>
<td>Editorial Consultant, specialized in digital media</td>
<td></td>
</tr>
<tr>
<td>Editorial Director</td>
<td></td>
</tr>
<tr>
<td>Electronics Engineering Technologist</td>
<td></td>
</tr>
<tr>
<td>IMO</td>
<td></td>
</tr>
<tr>
<td>Information Architect (x3)</td>
<td></td>
</tr>
<tr>
<td>Information Design Manager</td>
<td></td>
</tr>
<tr>
<td>Information Developer (x3)</td>
<td></td>
</tr>
<tr>
<td>Information Experience Strategist and Architect</td>
<td></td>
</tr>
<tr>
<td>Lead Content Strategist</td>
<td></td>
</tr>
<tr>
<td>Lead Documentation Specialist</td>
<td></td>
</tr>
<tr>
<td>Localization Leader (there’s another person acting as the IA)</td>
<td></td>
</tr>
<tr>
<td>M&amp;A Strategist</td>
<td></td>
</tr>
</tbody>
</table>

6. Do you do content strategy mostly for content marketing or multichannel publishing (documentation)?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content marketing</td>
<td>15.5%</td>
</tr>
<tr>
<td>Multichannel publishing</td>
<td>47.4%</td>
</tr>
<tr>
<td>Both</td>
<td>37.1%</td>
</tr>
</tbody>
</table>

7. Does your company have a unified content strategy the spans both content marketing and multichannel publishing?

<table>
<thead>
<tr>
<th>Ans</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>19.8%</td>
</tr>
<tr>
<td>No</td>
<td>80.2%</td>
</tr>
</tbody>
</table>
8. How did you learn to do content strategy? That is, how did you learn what you need to know to work as a professional content strategist?

Tabulation Summary: (totals more than 100 due to multiple answers per respondent)

- On-the-job experience/trial and error: 50%
- Books/websites/self taught: 41%
- Attend conferences/webinars: 30%
- College/other coursework: 5%
- Meeting/MeetUps/networking: 4%
- Hired someone/outsourced: 4%

9. Anything else you'd care to say or ask?

Here are a few of the comments respondents added:

“Content Strategy is a superset of technical communication. While a technical communicator is focused on delivery, the content strategist is more focused on business case and strategy.”

“I was at a marketing and communications agency that was pivoting to become a customer experience consulting firm and they wanted me to be a consultant, which I didn’t want to do. I looked around and based on my understanding of the industry, told them they wanted a CS. I wrote my job description and the process for working with the consultants. They adopted it and that was six years ago now.”

“It’s about the strategy, not the CMS.”

“Most organizations don’t understand the full potential of content strategy and as a result the opportunities are weighed down by lack of resources. While some results can be easily quantified, others cannot without more resources, wherein that becomes the justification for not investing in the right tools and right people.”

“The over-arching impact of a unified content strategy seems to be hitting home for more and more companies. Strategists are learning to prove their knowledge, impact, and usefulness by speaking in a business-oriented language, and executives are listening.”

The fact that 96% of the respondents doing content strategy reported they taught themselves the skill via books, attending conferences, and trial and error is yet another example of a drum I’ve been beating in Intercom since 2005:

- You not only choose the path you walk in your career, you create the path you walk.
- Want to increase your standard of living? Leverage your core competencies and create a new path!

Summary

Out of the 104 people who responded to the survey, the vast majority were self-taught through reading books, going to conferences, and/or on-the-job trial and error.

One respondent, however, added these words of advice: “Stop reading and start doing. There are countless books and articles to read on how to do content strategy; however, learning comes from doing.”

Another respondent echoed my observation that content strategy means different things to different people: “There are no universal definitions of what a content strategist is. It’s evolving, albeit slowly. I am struck by how it encompasses many slices from many different disciplines, at least at its best: it takes story telling, data organization, operations, marketing, analysis, research, and on and on.”

Finally, Amanda Cross from Crosswise Consulting offered this on what content strategy is and why companies need it:

“I’ve found that it makes sense to everyone in business, not just content creators. Redundancy and information silos are things that everyone has experience with.

Every business has content: website content, technical documentation, solutions created by customer service, training materials, sales materials, the list goes on. But when so many different people are creating content for the same company, you naturally get overlaps, which means wasted time and money, and conflicts, which can send a confusing message to customers and damage your brand.

Content strategy is about planning in advance who should be creating what kinds of content and using tools and processes to make sure you’re realizing efficiencies and getting the information to everyone who needs it.”

Having unified content strategy reduces duplication of effort and enables companies to respond to market changes and manage the customer total information experience. Chances are, your company needs a chief content officer.

Well, what are you waiting for?

JACK MOLISANI (jack@lavacon.org) is an STC Fellow and the executive director of The LavaCon Conference on Digital Media and Content Strategies (lavacon.org). You can follow Jack on Twitter @JackMolisani and @LavaCon.
CONTENT STRATEGISTS are the management consultants of the content world. We are the professionals who listen between the lines as we record the litany of client pain points. We are the diagnosticians who interpret the trouble spots and turn them into a framework that the client can use to determine what might be the best prescription to alleviate their content woes. We are the interpreters who translate between the language of business and the language understood by technical professionals, and help keep the implementation on track.

By RAHEL ANNE BAILIE | Fellow
Practicing content strategy isn’t something that can be done by applying a formula. There’s a reason that medical school graduates aren’t allowed to become doctors without first completing an internship and then a residency. Or, as another practitioner remarked, you have to spend time in the trenches before becoming an officer and figuring out the strategies of battle. It’s important to know “how things should go” but it’s also important to how things should not go and to develop that gut feeling about the ways a project can go sideways before it does. A good strategist can pull from experience a couple of ways to course-correct and get things back on track.

**Serving the Content Lifecycle**

Content strategy is a system that consists of a repeatable process that governs the management of the content throughout the entire content lifecycle. If you parse that statement, it actually has a lot packed into that statement.

- A content strategy assumes that content is not part of a supply chain, but has a lifecycle. Content doesn’t get published a single time. It gets edited and republished; it gets revised and versioned. The lifecycle is iterative, and has multiple stages. (A description of the content lifecycle is described in the *Johnny Holland Magazine* http://johnnyholland.org/2010/10/content-lifecycle-closing-the-loop-in-content-strategy/)
- The implementation of the strategy is systemic. It’s not a one-off way of producing content, but a repeatable process that the content producers, designers, and others professionals along the line can depend on to produce content well.
- The strategy is governing. It defines who does what along the way, and ensures that the process can be reliably repeatable.
- And last but not least, a content strategy is just that: strategic. The strategic part is answering the question of why. Why is content being produced this way and not that way? What are the business drivers and why can this strategic direction make a difference? How can we improve, and why is this a good idea? As soon as you talk tools and processes, you’re talking implementation.

**Getting a GRIP on Content**

A simple way to explain the underlying methodology for content strategy is the GRIP method. This method, which I’ve used in my practice for over a decade, has an infinite number of variations. That’s not to say that this method is simple or easy. However, much like the method for diagnosis and prescription of a doctor or a consultant, the actual phases are straightforward. It’s the conclusions that the practitioner draws that will ultimately bring strategic value to the table.

- G is for gap analysis. Look for the gap between the current state, what is happening now, and the future state, where an organization wants to be. Once it becomes apparent where the content—editorially or technically—misses the mark, it becomes apparent how to lay a foundation for a strategy that will work for a particular situation. There is no one-size-fits-all solution; each situation needs an individual set of recommendations based on the findings of the gap analysis.
- R is for requirements gathering. There are two sets of requirements that need to be understood. The first set is business and user requirements. The organization’s business requirements need to be met; if the organization cannot leverage its content as a business asset, a big opportunity is being missed. The flip side of that coin is understanding user requirements. Knowing what content your readers/viewers need and why is a critical step toward an effective content strategy. The second set is content and technical requirements. Creating effective content is the editorial side of the coin; being efficient with content production is the flip side. Having a good technical system means delivering content faster; good editorial means having good content to deliver.
- I is for interpretation. Interpretation is where the magic happens. A content strategist needs to have a good understanding of how sort through the discovery material gathered from the gap analysis and requirements and figure out how all the puzzle pieces fit together. How the requirements and gap analysis get interpreted can make—or break—the strategy for creating, delivering, and managing content.
- P is for process. The final product is a content strategy: a repeatable process or methodology for managing your content throughout the entire content lifecycle. Your customized strategy allows you to deliver your content, reliably and cost-effectively, from the right source, to the right audience, at the right time, in the right medium, on the right platform, in the right language, and through multiple iterations and versions.

Having a reliable method for assessment is one half of the equation. The other half of the equation is to understand the principles of content strategy from the view of the practitioner: the writers, content managers, content architects, and technologists associated with producing and delivering content.

**Basic Principles of Content Strategy**

Developing a content strategy to address all of the aspects needed is not a simple endeavour. As a starting point, you can get your content strategy off the ground with these basics:

- **Content analysis.** Understand the content landscape. Create an inventory, carry out an audit, and then analyze the content from qualitative, quantitative, and technical points of view. Look at all the content within the organizational ecosystem, not just the content for one medium or one project. Behind the analysis should be research typically done ahead of time by business analysts who assess the needs that the organization hopes to address through a content strategy, and by
user experience professionals who determine the who, what, when, where, why, and how of the audiences who will consume the content.

- **Unvarnished content.** Resist the temptation to give meaning to content through inline formatting. Content should be as plain as possible. No desktop publishing, no inline formatting. Plain content can be leveraged far more easily than content with embedded formatting. Format-free content is easier to migrate between systems and is interchangeable between systems that use a common set of content. Figure out if the content has been polluted by misuse of inappropriate mark-up and what it would take to fix that.

- **Content standards.** Editorial standards are important and should not be sacrificed. However, to leverage content, it needs to conform to any international standards that are applicable to that content type. This means getting familiar with content standards—from Dublin Core to schema.org to DITA—and knowing when to use them and why. This also means understanding the competitive landscape and where the differences are between the value proposition of the organization and its competitors.

- **Technical and editorial.** It’s not worth investing in the technical side of content if its sole purpose is to produce and deliver bad content with more efficiency.

- **Semantics.** What allows content to be leveraged, beyond the combination of good content and good technology is metadata. Without good metadata, content is hobbled: software tools won’t understand what to do with the content, and search engines won’t understand the content. Understand the place of administrative, structural, and descriptive metadata, and the ways all three types are needed to help content meet business objectives.

**Additional Considerations**

Once you’ve covered the basics, there are other pieces you’ll likely need to address. This is not an extensive list but an overview of some of the more common aspects of a more complex strategy.

- **Closed-loop approach.** Build a strong foundation for content solutions and ensure that the foundation is as extensible and scalable as possible. A solid foundation allows for growth and adaption. Create content solutions that can draw from a technology-agnostic single source and that can be easily published to many different platforms. Build into the process the ability to track content, versions, status, and other aspects that make up a good audit trail.

- **Technology matters.** As the purpose of a content strategy is to support business goals and user needs, adopting the right type of system is critical. Using a system because it’s what the IT department has or because the VP used it at a previous company is not a good approach. Get a GRIP, and then choose the system you intend to implement.

- **Measurement, assessment, maintenance.** Evaluate the performance and effectiveness of a body of content, and then implement a process that measures content and its effectiveness to all of its audiences. Continue to refine the success metrics and key performance indicators and use that to develop the content lifecycle to make content perform.

- **Governance.** As a content strategy develops, certain decisions will need to be made about how content is managed throughout the content lifecycle. Making these decisions as issues arise avoids the tendency for management to make snap decisions when pressed later on or to capitulate to the loudest voice in the room.

- **Talent and skills.** Developing a content strategy needs specialized skills. Different content strategists have different skill sets. In each case, they should have a deep understanding of content, albeit from different perspectives. Implementing an end-to-end strategy likely requires a variety of skill sets. Core skills are content creation such as writing, and creating content in other media such as graphics, illustrations, and videos.

- **Collaboration.** A content strategy can’t be developed in a silo. There is the need for information architecture (to organize content), analytics and search engine optimization (to make content rank properly in search engines), library sciences (to develop indices and taxonomies), curation (to keep your content relevant, fresh, and fully connected), and technology (to create content types, models, and other structures).

**Embracing the Chaos**

Taking on content strategy means aligning business and user priorities, balancing project tensions, and creating order from chaos. It’s not for the faint of heart and it’s not for the new kid on the block. Content strategy needs the voice of experience applied to a reliable method for discovery, analysis, and implementation.

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The Importance of Content Strategy

By Scott Abel | Senior Member

There’s been a lot of talk about content strategy in the field of technical communication over the past decade. It’s a hot topic at conferences, on the Web, and in magazines like this one.

Despite the attention being paid to content strategy by technical communicators and other content professionals today, we lack a common understanding of the term. Content strategy means different things to different people. And the differences in definition often are a matter of vantage point. It is not uncommon for those who come from the technical communication world to think of content strategy differently than those who hail from marketing, PR, user experience, information architecture, or mobile interaction design. As a result, confusion abounds.

This is in part due to the absence of an organization to declare what content strategy is—and what it isn’t—and to act as a clearinghouse for information about the discipline, its best practices, lessons learned, case studies, and events. We lack an organization designed to bring all those concerned with content strategy under one big tent. In short, there is no Society for Technical Communication for content strategy.

What is content strategy?

Let’s start with a simple definition. Content strategy specialist and technical communication guru Rahel Bailie says, “Content strategy is a repeatable system that governs the management of content throughout the entire content lifecycle.”

That’s true. And it’s concise. But content strategy is more than that.

It’s about envisioning the future of content—its development, management, and delivery—and creating a plan that helps us leverage content to achieve our goals. It’s about creating a flexible, responsive roadmap that can be quickly adapted to the challenges that will undoubtedly interfere with our well-intentioned plans for success. It’s just as much about our ability to respond quickly to changes, threats, and opportunities as it is about being able to stick to rigid and rules-based processes, follow standards, and meet project milestones.

Too many content strategists miss the mark when talking about strategy. A content strategy must serve both the needs of external audiences (customers and prospects you hope to dazzle with your content) as well as the internal audiences (people who are involved in creating, managing, and delivering your content). And a solid content strategy must be informed by what you know about your company (internal information) and what you know about others (external information such as the competitive landscape, socio-economic and business climate, laws and regulations,
and, in some situations, changes in global weather patterns, pandemics, migration, war, availability of broadband mobile, labor, and myriad other factors).

Content strategists are concerned with actions, resources, costs, opportunities, threats, and timetables associated with producing content that helps us meet our goals and that supports our vision. Strategists do not get lost in the weeds of minutiae. What font is best for use in your mobile documentation app? What tone of voice do you plan to use in your Web content? What should be included in the style guide? These are all considerations of various importance, but usually not the domain of the content strategist.

It should be noted that a content strategy is not a deliverable or a document, although it’s imperative that you write it down, deliver it to others, and make sure they understand and follow it. It’s also critical to revisit it often. That’s because content strategy is a living thing. It needs to be used, reviewed, revised, refreshed, and reconsidered regularly. Reviewing your strategy several times a year (at regular intervals or after important milestones) allows you to determine if the content you are creating (and the way you create it) helps you meet your goals. It also allows you the opportunity to think critically about how you do the work you do and whether your actions are helping to drive your business forward or not.

At its most basic, creating a successful content strategy is about mastering the art of the possible. It calls for us to reimagine the future. To declare what we’re going to do to harness our resources (human, financial, and technological) to create content designed to help us accomplish things tomorrow; things that may be impossible for us to accomplish today. To do so, we’re going to need to get creative. We’re going to have to become, as Bailie frequently says, “business consultants for content.” And we’re going to need vision (and plenty of it).

**Vision: The secret ingredient in every successful content strategy**

“Vision and strategy are both important,” says business leadership expert Michael Hyatt. “But there is a priority to them. Vision always comes first. Always.”

Vision is not a description of what your company is or what it does. Your vision is what you want your organization (or division or department) to become or to do. It’s a goal. It’s a clear, concise, and easy-to-understand description of the future-state you desire.

Before you start conjuring up your vision, be sure to avoid confusing it with your mission. Although many business strategists mistakenly use these terms as synonyms, they are not. A mission statement describes the primary purpose for your business (“makers of durable medical goods and precision surgical supplies”), whereas vision statements offer a clue to the future direction of the organization (“to introduce the world’s first $20 wireless tablet computer to serve the developing world”) and it usually includes some language describing corporate values (“make a difference in the lives of families impacted by HIV/AIDS on the African continent”).

If you are creating a content strategy for a department or division of a company, your vision should still map back to the company vision and mission, but can (and should) be specific to your domain. If you work for the “makers of durable medical goods and precision surgical supplies,” perhaps your vision is “to create an amazing customer-support experience” that allows you “to deliver the right content, to the right customers, at the right time, in the right language and format, on the device of their choosing.”

Whatever you decide your vision of the future is for your department, remember that your vision is your goal (or set of goals). Your content strategy is the high-level master plan you intend to follow to help you reach your goals. Goals are things like “create source content that is capable of being translated by machine with 90% accuracy in the target languages,” “improve customer satisfaction scores by 30% amongst our best customers,” and “get our product approved for sale in Germany by end of 2014.” Tactics are the actions—“purchase component content management system,” “hire software trainer,” “convert legacy content to XML,” “look for new office space in Spain”—you will take to meet your goals.

The vision plays a critical role in content strategy development. Vision not only provides us with motivation (“to become the first ‘zero-waste’ city by 2020”), it also supports critical business decisions (“moving our software—and your information—to the cloud”), and is what we measure against to determine if we’re making progress (“to become the largest provider of smartphones to Latin Americans living in the southwest United States by 2014”).

While your vision should include long-term goals, considering the speed with which technological advances are changing our industry (and the world around us), it might be a good idea to limit your long-term vision to three years or so. This approach allows you to set some goals for the future, but also allows you to set yourself up for some quick, achievable victories.

**Conclusion**

Vision is a critical (yet often overlooked) success factor in many content strategy projects. Well-crafted vision statements are designed to guide strategic decisions and can serve to energize and motivate others. Your vision can also help you establish a standard of excellence, stimulate quality improvement programs, and orient you toward the future. When paired with a solid content strategy, keeping your vision in sight will ensure you get from where you are now to where you want to be in the future.

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The Technology Side of a Content Strategy

By Joe Gollner
Content Acquisition

Content acquisition addresses the question of how an organization will acquire the content assets that are called for in the content strategy. The acquisition activity will encompass the planning and design of the content that will be needed. It will also entail the creation of new content, the revitalization of legacy content, or the licensing of third-party content as necessary. Under this activity, you will consider what industry standards might apply to your content and what authoring tools might be used.

Content Delivery

Content delivery focuses on the publication of information products and their provision to users wherever they may be and in whatever circumstances they might find themselves. The delivery activity will establish the process whereby content assets are selected, assembled, and formatted so as to effectively address all identified user requirements. It is as part of this activity that you will consider what content transformation tools and techniques you will deploy and what publishing platforms you will leverage to generate information products of the highest possible quality.

Content Management

Content management introduces the level of control and security into an organization’s content environment that is appropriate to their business activities. This management activity will put into place the processes whereby content assets are maintained as relevant, valuable, and effective given the needs of the other lifecycle activities and the business objectives being supported. It is here that you will consider what repository technology will be used, how security procedures will be implemented, and what facilitating tools, such as workflow automation, will be deployed.

Content Engagement

Content engagement injects the perspective of information users into the content lifecycle. The content engagement activity involves content stakeholders in the process of validating, improving, augmenting, and contextualizing content through the provision of rich feedback. Engagement, as a management concept, is a measure of how much a stakeholder is invested in something. Accordingly, content engagement seeks to maximize the degree to which content stakeholders, and in particular the users of the information products being published, are willing to invest in the improvement of the content. In a very real way, content engagement becomes an expression of how useful the information being provided is to those stakeholders and therefore how valuable the content really is to the organization. It is as part of this activity that you will look at how your organization leverages social media to involve your user community in validating, improving, and extending your content. It is also here that you will look at how analytics and other assessment techniques might be used to gain a clearer understanding of how your content is being used.

Content Strategy and the Content Lifecycle

When we come to consider how we will deploy content technologies, we find ourselves thinking about the content lifecycle. We also find ourselves thinking about how our content strategy will change that lifecycle and how the operation of a changed lifecycle will in turn modify our strategy.

Content Strategy

A content strategy establishes how an organization will leverage its content assets to achieve its overall business goals. A content strategy also provides a roadmap describing how these goals will be realized. Part of the focus in these management instruments will fall upon the nature of the content that will be needed. And part of the focus will fall upon how this content will be handled and leveraged.

![Figure 1. The Content Lifecycle](image-url)
picture of how content is being used and therefore how effectively you are leveraging your content investments.

**The Content Dynamic**

The content lifecycle model identifies the main activities that an organization will perform as it acquires, delivers, manages, and leverages its content. Some organizations will conduct these activities very poorly while others will be innovators who relentlessly pursue improvements. How well an organization performs these activities and how well these activities are balanced will determine, to a surprisingly significant degree, how well an organization performs overall. The productive interaction among these content activities will drive what we can call the content dynamic.

![Figure 2. The Content Dynamic](image)

**Iterative Implementation**

Probably the key concept to be adopted within your implementation roadmap is that of iterative development and deployment. While it is quite easy to say, and many IT shops advocate its theoretical merits, iterative implementation is actually quite a rare phenomenon. What is most important to keep in mind is that there are some tricks that you can use to make iterative implementation work in your organization as part of your content strategy. Here is a selection of these tricks of the trade.

- **Content Scenarios.** Content scenarios basically amount to business prototypes. These prototypes supply examples of how an organization’s content might look in an envisioned future and demonstrate how the services being provided to information users will be improved as a result. These scenarios become business-oriented demonstrations that can be used to build up the interest and even excitement of executive management. And there is nothing quite as useful as an excited executive champion who can help you navigate the approval gauntlet.

- **Delivery First.** Although it is true that maintaining balance among the content lifecycle activities is important, political realities do demand that some compromises be made. Specifically, it can be highly beneficial to place an early emphasis on implementing improvements in the content delivery environment.

Implementing Content Technologies

Unless your organization plans to realize its content strategy using nothing more than HB pencils and foolscap paper, you will arrive at the point where you must consider what technologies you will deploy. To be precise, HB pencils and foolscap paper are possible choices for your content technologies, just not very inspired or scalable choices. It should be expected that your organization will need to invest in some more advanced technologies if it hopes to participate in the global economy for any length of time. It follows that the roadmap set out with your content strategy will establish your plan for identifying, selecting, deploying, and evolving appropriate and affordable content technologies.

**Investment Justification**

It should be noted that there will be specific challenges surrounding the justification of content technologies. Suffice it to say that an important part of your content strategy will establish the groundwork for justifying the essential technology investments that an organization must make if it hopes to succeed against its stated strategic goals. It goes without saying that your content strategy will facilitate the justification for all of the investments that will be needed and not just those associated with content technologies. Our focus, however, is currently directed to the technology side of a content strategy where there are unique challenges to be overcome. One of these challenges is the fact that content technologies will typically fall outside the realm of experience, and therefore outside the comfort zone, of most information technology (IT) shops.

Several of the concepts that are touched on below have evolved over the years as tools for engaging and coopting IT shops so that a good content strategy will at least have a chance of survival and maybe even success. Let there be no mistake, how well you manage the justification of content technology investments will be a major factor on whether, or not, your content strategy even gets off the ground.
And this is done with the full knowledge, and even the active encouragement, of the content authors and editors who often must accommodate added complexity within their work as a result. It is seen as a tactical investment because the release of significantly improved information services achieves one very important end in that it builds a supportive and vocal constituency among the users. As this user community often travels under the name of customers, it is heartening to see just how effectively their interests can be used to batter down internal resistance, for example from an IT shop.

- **Just Enough Content Management.** Among the most common reasons for failure to realize the potential of a content strategy is somewhat surprising. Nevertheless, it is also a remarkably common reason and in many ways it can be considered the norm. This is the tendency to over-invest in the content management environment that supports just one of the activities within the content lifecycle. And this over-investment in the content management infrastructure will often hamper the overall initiative and thereby prevent organizations from making broad progress against their content strategy.

The issue that arises around content management is that it is an area where IT shops feel most comfortable directing investments. The fact that content technologies in general are unfamiliar to mainstream IT professionals in fact bolsters their desire to impose stringent controls over content assets and content processes. There are some problems with this approach and they are very serious problems. One is that content management is an area where potentially large amounts of money can be expended. This can have the concrete consequence of leaving little or no budget to invest elsewhere in the content lifecycle. Another problem is that the investments in content management, although major, can be almost entirely invisible to information users whose active support is so important. Yet another problem, and the most serious one of all, is that an over-investment in content management will put into place tools and procedures that can become an impediment to the evolutionary dynamic that a content strategy ultimately seeks to initiate and sustain.

The **Just Enough Content Management** tactic is one that intentionally restricts the level of investment that is made in the management environment until such time as the evolutionary dynamic has had an opportunity to flush out new or changed requirements. This tactic also seeks to build up the level of support that is manifest within the all-important customer community as this can, with a little finesse, be turned into an expanded budget for content management and all other aspects of the content lifecycle.

**Content Strategy, Architecture, and Solution**

If the technology side to your content strategy is handled well then the outcomes can be very compelling. The goals outlined in your strategy will have been achieved and, in being supported by affordable and sustainable technology investments, the envisioned benefits can be enjoyed for some time. Even more importantly, you will have been able to achieve new goals that only emerged as you moved forward with implementing your original strategy. In adopting an approach that encourages, rather than impedes, your ability to evolve your content and content capabilities, you have been able to respond to market changes that were not present when you started your strategic planning efforts.

![Figure 3. Content Strategy, Architecture, and Solution](image)

Now it should be emphasized that the effective handling of content technologies is a specialized area of expertise and experience. It is also an area where there are advanced techniques that can significantly improve the chances of long-term success in your content technologies investments. Some of these techniques bear upon the definition and governance of a content architecture. A sound content architecture is important because it will determine how well, and how sustainably, your content lifecycle will be reflected in, and supported by, your technology investments. Some of these advanced techniques bear upon the integration of the content lifecycle activities and supporting content technologies into a unified whole. This unified whole, when done well, becomes the tangible realization of your evolving content strategy. It is in this way that your content strategy is expressed through your technology investments to become a content solution. And an effective content solution delivers a range of planned and unplanned benefits and allows your organization to accelerate the rate at which it evolves.

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TECHNICAL COMMUNICATION (tech comm) and marketing communications (marcom) both provide information about a company’s products, but the resemblance ends there. In a typical organization, marcom is created by one group of writers with marcom tools; tech comm is created by a different group of writers using different (and incompatible) tools. We don’t just have two separate sets of content—we have different processes, different style guides, different tools, and different people doing the work.

At first glance, the two types of content also have different goals:
- Marcom: Tell a story about a product so that people will buy it (persuade)
- Tech comm: Explain the product so that people can use it (inform)

The reality is more complex. It’s important to align the story and the explanation. For example, if marcom asserts that a product is fun and easy to use but the tech comm content is dreary, the marketing message is contradicted by the technical content. A claim that a particular product is highly configurable can be supported (or not) by a configuration guide that explains the possibilities.

In many cases, both the story and the details are needed to provide a buyer with a full picture. After marcom tells a compelling story about a product, a potential buyer might consult tech comm content to figure out whether a unique requirement is supported. Tech comm content doesn’t always provide context—there are instructions on how to do a task, but why is that task important? Why is this product’s approach to a task better than competitor’s approach? Those are marcom questions.

Some information products fall into a gray area between tech comm and marcom. White papers, for example, are full of technically detailed information but are intended to be persuasive. Data sheets describe features and benefits (marcom), but they also provide product specifications (tech comm). But even for these hybrid documents, collaboration between marcom and tech comm is rare.

A successful organization needs to take the best of both worlds: from marcom, the critical work of positioning the product in the market; from tech comm, the information that makes it possible to use the product. Today, this type of interaction is rare. Instead, we have siloed organizations that don’t talk to each other.

Quite often, this separation leads to a lack of understanding and respect. The marketing people think that tech comm is text-heavy, dense, and badly formatted whereas the tech comm people think that marcom is shiny, beautiful, and content-free. Each group believes that their work is far more important than the work done by their counterparts.

This cold war is silly. We need a more holistic view of content across the organization. For customers and potential customers, the political disagreements between marcom and tech comm are irrelevant. They want product information, and they want it now.

Marketing and technical content should complement each other and both are part of a successful content strategy. Very often, however, organizational structure does not
support collaboration between marcom and tech comm. The two departments are in completely different parts of the corporate structure. Most often, marcom reports to the chief marketing officer. For tech comm, the picture is more varied; sometimes, tech comm reports to the CMO, but more often it’s the CIO or CTO. Especially in large organizations, it is often difficult to break down the barriers between these executives and their fiefdoms. This leads to annoying bureaucratic problems, such as the following:

- Which organization will provide funding?
- If there is a business case and cost savings, which organization gets credit for these results?
- How is success measured and what if success looks different in each organization?

It’s hard to work together when the organizational structure is set up to prevent collaboration. In most companies, that’s the reality. One potential solution is to move all content into a single organization (usually marketing) or to establish a chief content officer position with ownership of all corporate content. But most of us are not in a position to make this decision, so instead, we need to start small as we attempt to align marcom and tech comm.

Your organization’s corporate culture determines the best way to approach this problem, but here are a few suggestions:

- Establish good working relationships between tech comm and marcom. Building a mutually respectful relationship is the first step. That means no more jokes about technical writers’ obsession with “insignificant” details or marketing writers’ “optimistic” assertions about product capabilities.
- Launch a small project that both teams benefit from, such as an improvement in website analytics or an assessment of translation practices.
- Assess the content overlap between the groups. Could there be content reuse, or is the strategy to coordinate tone, messages, and timing?
- Figure out whether the two organizations work together on hybrid documents, like white papers and data sheets. As a starting point, choose a project whose success or failure will not make or break either team. The primary goal is to establish mutually respectful working relationships, and it takes time to break down long-established patterns and stereotypes. It is also wise to choose a relatively easy project with a high chance of success. A project to improve Web analytics, for example, is probably easier than an initiative to align style standards across multiple departments.

Tech comm and marcom can help each other:

- Tech comm can use the marketing angle to help get tech comm resources.
- Marcom can use tech comm to prove claims of features, benefits, and leading-edge capabilities.
- Tech comm content can help improve website search rankings, which helps marketing with product visibility.

**What tech comm can learn from marcom**

One powerful way of unlocking business value in your technical content is to rethink its presentation and its usage.

In many cases, technical content has marketing applications, and by providing a more user-centered approach to the content, you can increase the value of the content. For example, a collection of hundreds of data sheets is tedious to wade through, but a product configuration tool could help a buyer quickly narrow down the possibilities to just a few options and then provide a side-by-side comparison of the features. The data sheets contain all the needed information, but it needs to be reworked into something interactive rather than a collection of static PDF files.

**What marcom can learn from tech comm**

Writing resources are always limited, so streamlining the publishing process lets writers focus on content rather than formatting. A workflow in which information is created once and then published to all of the needed formats automatically saves time and resources. This approach also results in more consistent formatting.

**Should tech comm and marcom be under the same management?**

In the long term, I believe that the business advantages of a unified content team will lead to a restructuring of the content development roles. I expect that tech comm and marcom, along with other groups that produce customer-facing content (training, product support) will converge into a single content development organization. For the business, this approach offers compelling possibilities:

- Easier to make content consistent
- Implementation of a unified set of content development, deployment, and delivery tools
- Sharing of content across different information products
- Sharing resources to work on different content in different development phases (marcom before release, product support after release)
- Easier to set up a unified process for localization

**Conclusion**

The low-grade conflict between tech comm and marcom is long-standing and often entertaining, but it does not further business goals. It is time for professionals in both areas to recognize that they have much to learn from each other.


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Content Marketing & Content Strategy:

Making Room for Everyone at the Table

By Robert Rose
AS BUSINESS MANAGERS, we work together at conference tables. Speckled laminate. Glossy birds-eye maple. Delicately oval. Squarely utilitarian. Conference tables vary in style, but serve a practical function in both simple team and monumental executive-level meetings alike.

My friend Scott Abel, The Content Wrangler, often says something about content that I continually use in my work. “If the content we create is a business asset,” Scott says, “it’s worthy of being managed well.” So my focus is content marketing and my work, when I get asked to the conference table, is squarely focused on how content and storytelling can be a driver to business results. And one of the first things I commonly ask is, “Where is your content strategist?”

There is no doubt that the practice of content marketing and content strategy are different. Whatever the table surface, however buttery-soft the chair, the two roles are complementary, yet are separate nodes in the same circular loop of communication running between brand, target audiences, and effective communication. As both are trying to earn a seat at the decision conference table, the two practices would do well to work together.

**Marketing & Content Become More Strategic**

Being present at the decision-making place is a psychological sign of achievement as much as a physical one. Why is it that we don’t wonder why some departments have long held a seat of distinction—IT, HR, legal, R&D, accounting—while others are still yelling “Shotgun!” as they race to snare the wobbly-legged chair in front of the one remaining rough-edged corner? Go on; think about your company’s organizational makeup. Who might the discussion latecomer be? Customer service? A technical team member? Marketing-slash-Web-content folk? Yes, let’s look there.

Marketing and content should be more strategic processes in today’s company. That might seem an odd statement, but in my experience I still find that the practice of marketing and content strategy is subservient to almost every other department in the company. Can marketing folks talk to customers to understand their needs? No. Why? The sales department won’t allow it. Can content strategy even be recognized as a strategic part of the organization? No. Why? Because they’re often viewed as the nerds with red staplers (and pens), hidden away in dark crevices of the organization handling the documentation.

The process of marketing is changing. It’s becoming a fluid discipline, one that transmutes as technological, cultural, and economic levers alternately release and tighten in a wary, uncertain economy. Businesses can’t afford to ignore new communication platforms, like mobile and social, any more than they can cram wi-fi, Bluetooth, and hyper-connectedness back into the suitcase phones of the early 1990s.

Today’s marketing strategy uses content. It reaches around the weekly circular, through the TV commercial break, into the mailbox, down the phone line, and over the billboard to land on 32 simultaneously open browser tabs, 4 stacked-up webinars, who-knows-how-many smart phone apps, and two extended monitors. And that just describes today at the office. We haven’t even begun to talk about multi-tasking in front of the television.

The point is, as consumers and content creators alike, we’ve taken our long-standing communication channels, wrapped them in self-selected filtering platforms, and layered on functional task expectations (is there an app for that?), and tied them up with a collective demand for information. Good technology, unlimited data packages, “free” audience access (thanks, social media), and a content-hungry society means marketing opportunities abound, and there are a thousand ways for a brand to make Gawker.com (and not all of them are good).

**Excuse Me, Can You Validate Me?**

Marketing and communication haven’t been centered on traditional media for some time. Yes, those elements may still comprise part of the mix. But smart companies are learning to change the lens through which they view their efforts to keep up with consumers. Overt selling has given way to problem-solving. Sweeping statements have evolved to conversation-like messages. How customers feel when using our products and whether their lives are made more enjoyable and stress-free have become one of the litmus tests of success.

And this transformation is where savvy content strategists are seeing their fast-growing opportunity to get a seat at that table. As the process of marketing changes, the content strategist can find a way to demonstrate true value in understanding how to make marketing teams better. To paraphrase Jack Nicholson in *As Good As It Gets*, content strategists make marketing want to be better communicators.

And it is because of marketing’s ongoing fluidity—a true asset, I maintain—that some not-as-savvy content strategists believe marketing to still be of lesser value, more subjective, and only moderately empirically effective in achieving business goals. Marketers select hero photos and pen soft blog posts, nothing as cerebral and critical as actualized UX design or content inventory modeling. Right? Wrong.

Under-appreciation (from both perspectives) can present quite a disadvantage to emerging content strategists, content marketers, social media specialists, and community managers. Success requires education, validation, patience, and (most of all) communication. Champions of the new age of content-at-the-center-of-strategy must develop these nascent positions into more seasoned forms with a goal on advancing content-rooted disciplines by increasing understanding and acceptance among members of other departments.
Gaining admittance to the big-kid discussions is the first step for folks like content strategists and content marketers. The second may be busting preconceptions and resistance. For all the value a sound content strategy brings to marketing, there are times when content assets—like a blog post—are as they appear. No more, no less.

But also, marketers need to understand that, on the whole, content assets are more impactful when planned and developed as a holistic unit supporting a strategic objective to be distributed around multiple channels. People consume content in myriad ways throughout each day, and multiple platforms provide the means by which to concentrate on distinct message points to support the spectrum of learning modalities.

Our society’s increasing connectedness demands greater availability of information and increased functional sophistication. Content strategy plays a pivotal role in creating quality branded user environments, but may be overlooked in critical early planning phases of project management as an unnecessary investment or superfluous step. How can this be? As practitioner kinfolk, how can content marketers help validate content strategists so they can take their rightful seat at the discussion table? The answer may lie in how we help them tell their story.

**Content Strategy Could Use a Little Content Marketing**

The dichotomy of storytelling is that it can be as much (or more) about showing, about demonstrating, than telling. Through thoughtful use cases, illustrative examples, and experience-based solutions, content marketers and strategists alike can show users a path to resolution. Eliminating pain points—from lingering questions like “How do I …” to “what makes brand X different …”—is an objective of both content marketers and strategists alike. Marketers must step up and help the content strategist tell this story in a compelling way both internally and externally. And the content strategist must make sure the story is accurate and told as effectively as possible.

One of marketing’s many ironies (including that it’s frequently the first to be gutted when times are tough) is that it’s often dismissed as having a soft, dotted, or indirect financial business impact. In reality, marketing encompasses, enables, and supports short- and long-term critical business functions from service to retention to acquisition to reputation.

Marketing’s usefulness to these business functions stems both from its stalwart principles (think 4 P’s, SWOT, and KPIs) and its adaptability. What other area of business can serve so strong a resource to so many others, internal and external to the company? The list is short.

Similarly, the practice of content strategy informs visual and information design influencing user experience; content marketing is a vehicle for imparting brand stories influencing decision-making. There’s some overlap, as I’ve described. But there’s plenty of separation, too.

And the value of the content strategist to the marketer is as palpable. Content strategy can be as pragmatic as content marketing can be indulgent. The former methodically strips away the unnecessary and the excessive, drawing on commonly held and prioritized communication objectives to present information.

As I like to say, content strategy is a fine-edged scalpel while content marketing is a set of colorful magic markers. Both should rest in the top tray of the customer engagement toolbox, close at hand.

But no one gets a seat at the table—regardless of the discussion topic—without first demonstrating core competencies and a minimum depth of experience. Plus a bottle of peer juice to help fill in any unfortunate gaps (never doubt the power of networking). Lack those career assets? Stop. Do not pass go. It’s nose on the glass time, and you’re watching the meeting from the outside.

Today’s successful brands aren’t throwing open the doors to invite just any fresh-face, tablet-toting content person up to the table. Competition for good jobs remains stiff and the expectation of demonstrating results is more pervasive than ever. Content strategists and content marketers alike are tasked with growing proficiency in an ever-increasing number of technical programs and software as well as developing cross-discipline fluency to improve collaboration with developers, designers, project managers, and editors.

While some seat holders remain skeptical (heck, sometimes even openly hostile), still others support content’s place in the conference room. Truth is, companies need qualified, talented people to corral the content, shape it into something useful and interesting, and deliver it in usable formats. As we all know, it’s not as easy as it sounds.

With greater collaboration between all the roles under marketing’s umbrella, content strategy will eventually distinguish itself as the mission of the folks that care about user goals and behaviors like no other.

And doesn’t every brand need someone to advocate for the customer as much as it needs someone to spread its unique story? I think yes.

Now, will someone please go fetch that table leaf? It’s time we made more room.

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Defining Content
Going Beyond the Explicit to Find the Implicit Information

By GEOFF HART | Fellow

THERE’S A LOT of buzz these days about content and content management, but nobody seems quite sure what that content is and how it should be managed. That’s partially because the field of content management is still young and evolving rapidly, but it’s also because so many things fall under the umbrella of “content.” At one extreme, content includes large-scale artifacts such as end-user documentation for your products, marketing materials, documentation to support certification processes such as those specified by ISO 9000, legal documents (e.g., Sarbanes-Oxley), and policies-and-procedures manuals intended purely for your own employees. At the other extreme, it includes small-scale artifacts such as email addresses for key clients (which may exist on a single employee’s computer rather than in a central repository), a copy of a PDf file from a crucial client (which may exist only “in the cloud” in an employee’s Apple iCloud or Microsoft SkyDrive account), and even the automatic text entries stored in Microsoft Word’s document templates and .ACL files. Although many types of information belong in this category, it represents the easy part: this information is all explicit and easy to identify, although it may take persistence and a rigorous strategy to find it all.

Content also includes intangibles, such as the information about what you do and why you do it. That’s the hard part. Most often, this exists only in the heads of your employees and is passed on orally from managers and senior staff to new hires. This information has often been acquired over years and sometimes even decades of experience working for your company and with your clients, and is often responsible for much of your profits and most of your efficiencies. (It can also be responsible for severe inefficiencies, as I’ll discuss toward the end of this article.) Identifying and finding ways to record this information is referred to as knowledge management. Business-process knowledge is a crucial and often neglected aspect of content: it may never appear explicitly in documentation and other content, but it forms the invisible backbone and backstory (the context) in which all other content exists. This is why you have policies and procedures: they represent the implementation of proven strategies and tactics that define how to act on a large body of implicit knowledge.

Rather than trying to create a narrow, exclusive definition of content, it’s better to think of content in more general, inclusive terms. From the perspective of technical communication, I like to think of content as the knowledge that your organization requires to accomplish any of the following:

» Define your audience and enlist them in defining the characteristics of your products.
» Communicate why your product is important.
» Develop a product that will meet the audience’s needs and test to confirm that it really does.
» Develop documentation that lets them use the product correctly and efficiently.
» Develop feedback mechanisms so that both the product and its documentation can evolve along with the needs of their users.
» Iterate and improve.
Although this audience knowledge may never appear explicitly in your product or documentation … it defines the goals your products must help your audience to achieve.

It’s no coincidence that these categories, enacted in roughly that order, recapitulate the product development lifecycle that most companies follow to a greater or lesser extent while they develop their products. This is true whether those products are concrete items ranging from bulldozers to books, or intangibles ranging from brands to best practices. In the rest of this article, I’ll discuss each of these aspects of content. Note that depending on your specific work context, not all of these categories of knowledge will be relevant. Nonetheless, understanding why they might be relevant in other contexts will often provide useful insights into your own work. At the end of this article, I’ve provided a list of useful references to help you start exploring some of the topics I’ve discussed.

Define your audience and enlist them in defining your products

Understanding your audience begins with a process referred to as audience analysis. This subject is too broad to encapsulate within a single short article, so instead I’ll summarize the key points and provide references to my past articles on this subject. At its most basic level, audience analysis starts with learning the identities of the people who will use your product or its documentation: who are they? Once you know the who, the next question focuses on the what: what are their needs and how do they meet those needs? Armed with that knowledge, you can identify groups with different sets of needs and begin looking for solutions to meet those needs.

For example, if you live in the United States, you may need to comply with the provisions of the Americans with Disabilities Act (www.ada.gov), and specifically with Section 508 of the Rehabilitation Act (www.section508.gov), which is designed to ensure accessibility to information technology.

Branding, which represents the overall perception of your line of work and your products, is a neglected aspect of audience analysis. Consider, for example, the difference in public perception of Apple products (elegant design, simple and easy to use, overpriced) and Microsoft products (complex, virus-prone, often inelegant, economical). Those stereotypes are clearly simplistic and thus, inaccurate, but they shape how audiences think about your product and how you may need to shift those perceptions. A related issue faced by both Apple and Microsoft is the (correct) impression that computers are difficult to use and therefore somewhat intimidating. Solving that problem is a challenge that many technical communicators face.

Although this audience knowledge may never appear explicitly in your product or documentation, other than perhaps in the form of separate manuals for technology managers and technology users or for experts and neophytes, that knowledge shapes all the content you create and is therefore a crucial component of your content: it defines the goals your products must help your audience to achieve.

Communicate why your product is important

About a decade ago, while I was traveling in China with a delegation that was invited to discuss technical communication with people in academia and in high-tech industries, we ran into a stumbling block: many of our hosts couldn’t understand the difference between technical communication and marketing. The explanation I finally came up with that successfully communicated the difference was the following: Marketing is how we persuade someone that our product will meet their needs, whereas technical communication is how we teach them to meet their needs using our product—and incidentally, how we try to ensure that they don’t get fed up and return our product for a refund.

Marketing builds on a key aspect of audience analysis: understanding our audience’s needs and how our product could meet their needs. Effective marketing seeks ways to persuade people that we really can meet their needs. This requires an understanding of your company’s brand and of the context in which your company produces products, both of which strongly affect how people think about your product. In some cases, your marketing must strive to change those perceptions. For example, computers intimidate most of their users—an inconvenient fact that most technical communicators forget because most of us are comfortable and proficient with the technology, and because most of us work with experts who lie at the high end of the expertise curve. Understanding the strength of the intimidation factor for people who are less confident or competent lets us directly address those concerns: marketing eases the fear, then we try to live up to the marketing hype (a subject I’ll discuss in the rest of this article).

Marketing was traditionally seen as one-way communication: we delivered persuasive arguments and the only way we knew what they thought about that message was indirectly, in the resulting sales. But marketing increasingly seeks to build partnerships with our audience. As I’ll discuss in subsequent sections, working together with our audience to meet their needs (i.e., listening to their concerns and trying to account for them in our product and documentation development) is more effective. First, it eliminates the widespread perception that the only goal of marketing is to sell a product. Second, it provides important feedback about how to make our products better, and thus easier to sell. Third, and possibly most important, it replaces a soul-less commercial transaction with a relationship that lasts long after the sale is history. To learn more about technical
communication marketing, visit STC’s Marketing Communication community (www.stc-marcom.org/wordpress).

The relationship between marketing and content may not be immediately obvious, but a little thought reveals how this might work. First, audience information defines the content implications discussed in the previous section. Second, it reveals entirely new forms of content we should develop. For example, relationships are sustained by dialogue, and dialogue requires content in the various forms of social media I’ll discuss later in this article.

Develop a product that meets their needs and test to confirm that it really does
Understanding audience needs is the first step in finding ways to meet their needs. It seems redundant to say so, but you can’t solve a need that you don’t know exists. Iterative design, in which each new design is tested with your audience to see how well it works and identify omissions or failed designs, is how this is done. The approach pioneered by Alan Cooper and his colleagues is a highly collaborative form of design, explained eloquently and at great length in books by Alan Cooper and Kim Goodwin. Both approaches work best through a relationship that provides opportunities for testing of a design—indeed, the Cooper process cannot work without the relationship—and the relationship strengthens as the audience learns that we really do want to help them. Related fields include user-centered design (http://en.wikipedia.org/wiki/User-centered_design), user experience design (http://en.wikipedia.org/wiki/User_experience_design), and usability testing (http://en.wikipedia.org/wiki/Usability_testing), all of which are the focus of STC’s Usability and User Experience community (www.stcsig.org/usability).

Understanding audience needs is the first step in finding ways to meet their needs.

Product development therefore includes unsuspected sources of content. First, content is implicit in the details of the relationships you’ve established and of the strategies that resulted in both failed and successful designs. Second, descriptions of both effective and ineffective types of testing become important parts of your organization’s formal policies and procedures. Third, content may be forgotten when it is transformed from explicit forms such as printed manuals and online help into implicit forms such as embedded help that becomes part of the workflow and interface and that disappears from the explicit documentation. This leads us to the next point.

Develop documentation that lets them use the product correctly and efficiently
When you think of documentation, the odds are good you picture traditional forms such as printed manuals, online help, and websites. Content originates during the development of this information: writing, editing, product and documentation maintenance, and product and documentation revision. If you’ve engaged in single-sourcing, content management is integral to your actions. However, all of these steps conceal an important type of content: an understanding of the thought processes that guide the processes with the goal of letting someone learn how to use your product correctly and efficiently. After reading the previous section, you’ll understand that embedded help is one such form of content. This implicit knowledge includes forms of content such as the strategies used in flexible or fluid design (i.e., to let a Web page reflow to fit both a 21-inch desktop monitor and a 5-inch smartphone screen), and software-based assistance such as Microsoft’s wizards and how the help system in Macintosh OS X highlights components of the interface to show users where settings and tools can be found.

Develop feedback mechanisms that let the product evolve
The relationships with your audience that I discussed in previous sections provide an opportunity to create feedback mechanisms by which your audience reveals their needs and how you’re failing to meet those needs. For example, a neglected content area involves the online discussion forums that most software and many hardware companies now implement. The problems people experience and the solutions that experts provide are critical for improving your products and documentation, yet are rarely used in this manner. Few companies recognize the value of this resource and allocate sufficient human resources to managing it. Additional strategically important content involves an understanding of how the needs of your audience are evolving, and how both your product and your documentation must evolve to meet those new needs. Online forums are just one form of social media, a topic too large to address in this article; I’ve provided links to two of my articles that provide more detailed descriptions of these options.

In some cases, content is external to your organization. Industry magazines (e.g., PC Magazine, MacWorld) are excellent examples, since these magazines stay in business by understanding the needs of their readers and providing content that meets those needs (i.e., by performing ongoing audience analysis). Newspapers and non-industry-specific magazines with subjects that relate to your field are also excellent sources of content, since they monitor new technologies and business needs, both of which affect your audience and therefore affect you. They also periodically misinterpret a product category badly enough to create misunderstandings and false expectations you must solve through marketing or documentation.

Iterate and improve
One of my favorite catchphrases about the modern era is the seemingly oxymoronic phrase “the constancy of change.” Never before have the technologies and cultural institutions that support society changed as fast as they’re changing now.
Thus, your strategy for monitoring and responding to these changes is an important form of content (as I noted earlier). Any content you create now is only an interim solution: as business contexts and audience needs change, content must change to reflect the new reality. This means you’ll need to carefully monitor your context and audience, and as both change, to review both your content and your processes for producing, maintaining, and updating that content. I’ve provided two articles on process improvement that discuss one powerful way to perform this review.

**Don’t forget the “implicit” content**

As I hope I’ve demonstrated, a surprising amount of content is implicit and hard to pin down. Information about what you do can be determined by watching people carefully using the formal and semi-formal techniques of ethnographic or contextual inquiry, or more simply by careful observation. But understanding why someone acts in a specific way is less obvious. Most often, this exists only in the heads of your employees, and when asked why, they may have difficulty explaining the reason. Often this is because the method was passed on orally from managers to employees, without any explanation beyond “this is how we do it.” Then, it may be necessary to think deeply about the process and ask: “What conditions must exist for this approach to be sensible?” Understanding those conditions often reveals the why, and once you know the why, you can record it. Note that the “why” can include knowledge of both facts and ways of thinking, and each can be important in different contexts. Next, ask yourself whether those conditions still apply. If they don’t, it may be time to change the process to reflect current conditions.

Even when conditions haven’t changed, inefficient or illogical processes may need to change. When I worked for the Canadian federal government, I encountered the least rational and most inefficient paper-based filing system for the Canadian federal government, I encountered the illogical processes may need to change. When I worked the process to reflect current conditions. Next, ask yourself whether those facts and ways of thinking, and each can be important in different contexts. Next, ask yourself whether those conditions still apply. If they don’t, it may be time to change the process to reflect current conditions.

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**Conclusions**

Content is both the information we produce and the audience characteristics, organizational context, and thought processes that shape that information and how we produce and update it. The modern era is referred to as “the knowledge economy,” and content is the fuel that powers that economy’s engines. A good way to begin thinking about your organization’s content would be to conduct a content audit. Econsultancy provides a useful summary of what’s involved (http://econsultancy.com/ca/blog/9867-start-your-content-strategy-with-an-audit).

GEOFF HART (geoff@geoff-hart.com) has worked with many difficult and challenging individuals during a diverse career as a technical communicator and sometimes-manager. None of this prepared him for having to manage himself as a freelancer.

**RESOURCES**

**AUDIENCE ANALYSIS**


**DESIGN**


**KNOWLEDGE MANAGEMENT**

Quast, L. 2012. Why knowledge management is important to the success of your company, www.forbes.com/sites/lisaquast/2012/08/20/why-knowledge-management-is-important-to-the-success-of-your-company

KMWorld, www.kmworld.com

**PROCESS IMPROVEMENT**


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WHAT MAKES A STORY TRUE? True stories are provable; they are fact, not fiction. And the best true stories resonate because the facts speak to what matters most. Information professionals tell great stories about their work. We chronicle the ways that we drive excellent information experiences, increase customer satisfaction, reduce noise on the interwebs, boost organizational effectiveness, and support business strategy. Great information professionals enhance their storytelling with proof points—we talk about things like page hits, bounce rates, heuristic evaluations, audits, inventories, efficiency in creating and managing content, and the like. These are great facts, they make our stories true, and they resonate well with user experience and information professionals. We tell great, true stories—but are we telling the right story for the right audience?

We don’t think so. Our community needs to tell a different and better story about content for a business audience—those who hold the purse strings. Many of our great stories are missing that which matters most to executives: a direct tie to the key performance indicators (KPIs) and metrics that drive the broader business. Most of us are working in environments with scarce resources and funding challenges; most of our organizations can no longer afford initiatives perceived as “nice to have.” Web metrics, scorecard results, content reuse metrics, and other kinds of data are important, but if we cannot connect that work to things like revenue streams and successful conversions, ultimately, our work is at risk. Even high-value initiatives risk early retirement if they cannot prove a direct connection to a company’s bottom line.

Spoiler alert! For many information professionals, the core ideas in this article will seem like common sense—they sure seem like common sense to us. When we talk to information professionals, we know that we’re talking to technical communicators across all roles and titles, including content strategists, information developers, technical writers, and information experience designers, among others—information people with a sixth sense about content. The sixth sense that we have about the value of content and the information experience is what makes us exceptional at designing effective content strategy. However, that sixth sense is not one that everyone shares. The point of this article is that we need to move away from our intuition-based mode of operation to a more data-driven model. Although we respect and rely on Web metrics to do content strategy work, we believe that even those Web metrics fundamentally don’t address business KPIs like revenue streams and ROI.
This is a transformation that we’re driving at IBM. Learning to tell the right story about our work—in a language that makes the story true for a business audience—is a tough but crucial transformation for us. And we’re still learning. In this article, we share some of our discoveries, but also throw down an industry-wide call to action. Our industry as a whole is starved for data that prove the business value of content—particularly post-sales technical content—using facts that resonate with our colleagues in business strategy, finance, sales, product management, and marketing. This is more than becoming Web metrics mavens. To put it bluntly, this means finding, proving, and sharing the link between content and revenue (or whatever measurement matters most to your organization).

**True Stories About Content**

Our work to transform the way that our business thinks about content began by establishing some key truths about the nature of content. We had to articulate what it is about content that makes it such a precious business asset before we could begin to build a business case for change. Consider the following six truths about content.

**Truth #1: Content is a challenge**

Poor-quality information experiences and ineffective content strategies cost our clients, our stakeholders in our organizations, and us. Those costs take the form of time, money, frustration, and poor decision-making.

Researchers Susan Feldman and Chris Sherman have analyzed the impact of these information-related costs in the behavior of knowledge workers—people who work primarily with knowledge products, such as software engineers, scientists, architects, and us! Citing aggregate findings from studies conducted by IDC, the Working Council of CIOs, the Association for Information and Image Management (AIIM), the Ford Motor Company, and Reuters, Feldman and Sherman found that:

- Knowledge workers spend up to 35% of their time looking for the information they need (Feldman).
- Knowledge workers find what they need less than 50% of the time (Feldman).
- Knowledge workers spend 90% of the time it takes to create new reports in recreating information that already exists (Feldman).
- Knowledge workers spend 15–25% of their time on nonproductive information activities (Feldman and Sherman).

With this data in hand, Feldman and Sherman delved deeper into the problem space by developing a fictitious company through which to analyze the opportunity cost of these information-related challenges. Their fictitious enterprise employs 1,000 knowledge workers, each with a salary of $80,000 plus benefits. Using this scenario, Feldman and Sherman discovered that “an enterprise employing 1,000 knowledge workers wastes at least $2.5 to $3.5 million per year searching for nonexistent information, failing to find existing information, or recreating information that can’t be found. The opportunity cost to the enterprise is even greater, with potential additional revenue exceeding $15 million annually.” Furthermore, Feldman and Sherman observe that:

Other unpredictable costs to the organization include the cost of poor decisions, the cost in frustration and job satisfaction of knowledge workers, and the cost in sales due to inability to provide information to customers. ... Time is also a factor. If information is not located online, employees resort to interrupting their colleagues to ask for help or information. All of these factors are hard to quantify, but they all add to the cost burden incurred through poor information finding.

Spira and Goldes add to this story when they record that a Basex survey of over 1,000 knowledge workers found that as a result of information-related interruptions those workers (us!) lose “an average of 2.1 hours per day” that together cost the U.S. economy $588 billion per year.

**Truth #2: Content is an opportunity**

A wise person once observed that “Opportunity is missed by most people because it is dressed in overalls and looks like work.” (Some have attributed this quote to Thomas Edison, but the jury’s still out on that.) We encourage fellow information professionals to don overalls and prepare for some good work, because the challenges that we described in Content Truth #1 come with a silver lining in the form of huge opportunity.

Consider the nature of this opportunity by observing the role that technical content plays in the buyer’s journey from apathy to sale:

- Buyers of technology spend 21% of the buying cycle talking to sales people and more than 55% using information (Albee, 2011).
- Buyers of technology report that interacting with technical content is the second-most-important pre-sales activity that they do (Hershey).
- Buyers of industrial products report that “the only information more highly influential than pricing was detailed product information and specifications” (ThomasNet).
- Buyers in general make buying decisions in which up to 70% of the buying decision is made based on “information he or she finds online well before a salesperson has a chance to get involved” (Albee, citing a Selling Power presentation at the 2011 Sales 2.0 Conference available at http://bit.ly/Z08RyM).
- Buyers in general make over 45% of the buying decision “before [the] buyer even says hello to your [sales representative]” (Gerard, 18 March 2013).

These data show us what many in the field are now coming to understand, at least initially: “IT buyers find online search and the vendor website more valuable sources of buying information than face-to-face conversations”
(Schaub, 2011). This means that information has become a key agent in the process of generating revenue:

The buyer has taken control of the purchasing process; it’s a refrain heard often in marketing and sales channels. Information has become ubiquitous....

No longer are companies and their salespeople the gatekeepers that must be sought out for help to assuage curiosity, reveal solutions to problems, build business cases and select a short list of vendors to pursue. The informational gatekeepers are now represented by search engines, social networks and perceptions of relevance (Albee, 2012).

To be clear, we’re not just talking about content specifically designed for pre-sales. On the contrary, we’re talking about all content—including post-sales technical content. We’re talking about all content in the ecosystem that grows around a product in the public marketplace. Indeed, Fulkerson observes that “Post-sales information generates over 50% of viable sales leads” (emphasis ours). Similarly, IDC’s 2012 Buyer Experience study (cited by Schaub 2012) shows that “buyers prefer information sources that are value rich (thus buyers’ [first] preferred information source is technical experts) and expedient (buyers’ [second] preferred information source is marketing content).”

Thus content represents opportunity to drive the things that matter most to our companies: sales. Our work (get out those overalls!) is to design and deliver content that performs well against our companies’ business strategy, values, and KPIs—and relentlessly gather the data to prove it. We’re only starting to have the data to tell this story.

**Truth #3: The client experience is not limited to the design of the product user interface**

A “client” is an individual who buys or uses—or both—the product, solution, or service about which you create and deliver content. From a content perspective, it is important to think about the client experience rather than just the user experience, as the client experience more accurately reflects all the places in which your buyer or user has contact with your content. From a client’s point of view, the client experience spans every phase of the overarching lifecycle of product purchasing and use: evaluate, buy, deploy, use, manage, support, troubleshoot, and maintain.

Product user interfaces typically do not address each of those lifecycle phases as there are tasks in various phases that users complete outside of a product user interface. What fills in those gaps? What maintains the integrity of the brand before the buyer or user ever touches the actual product? **Content.** Our users touch content in every phase of the lifecycle. In fact, content connects each phase of that lifecycle. And each phase is an opportunity in which content can be leveraged to build awareness of our clients’ business problems and our company’s solutions, to generate client interest in our company’s capabilities, to gain visibility and mindshare for our portfolio of offerings, to grow loyalty, to generate sales leads, and to build community. Viewed from this perspective, content does more than shape the user’s end-to-end experience and their perceptions of our brand. Content is the client experience, and it’s a critical and inextricable aspect of the product user experience.

**A postscript: We also believe strongly that our interaction and visual design colleagues should be focused on client interactions outside of the immediate product user interface for the same reasons, and thankfully some of them are! Clients have many non-product based interactions with our companies—in particular during today’s popular, self-driven, online processes for evaluation, purchasing, and support. These non-product, user-interface-based interactions can make or break customer relationships and loyalty. Wherever this broader focus on clients’ non-product based interaction is not happening in the interaction and visual design, content fills in the gaps to pay an even more important and primary role to build and maintain those client-company relationships.**

**Truth #4: Content is a catalyst for purchase decisions**

We’ve got the beginnings of a strong link between content and what matters most in the marketplace, and we’ve established a definition of “client” and “client experience.” Let’s further explore the idea that content is the client experience by asserting that content is a catalyst that influences (dare we say it, that drives?) every aspect of product purchase and use. We don’t expect much argument about this assertion from a “use” perspective, but “purchase” is likely a new dimension of the argument for many in the field of technical communication. As a result, we’d like to talk about all of the things that we know about today’s typical client purchase process. Consider Figure 1:

![Figure 1: Content as catalyst in the lifecycle of a purchase](image)

In this image, the client interacts with content—from both official and organic sources—at every phase in the purchase process. From the early stages of product awareness and interest, through product evaluation and
purchase, our clients use company- and social-authored content and have the potential to contribute content back to the content ecosystem. Properly cultivated, all of this content can drive and shape action throughout the lifecycle of product purchasing. A client’s product use, and the use of content during product use, also shapes purchasing—both that client’s future buying habits and her influence of other, potential buyers through creation of her own content about her experiences with the product. But don’t take our word for it. The latest industry research proves our points.

Base One’s BuyerSphere 2012 report tells us that “If you want to influence a buying decision you need to start by asking where buyers go for information—because 87% of buyers go out and look for advice before choosing.” Indeed, “buyers are constantly online,” notes another researcher. Recall what Schaub told us earlier: IT buyers find searching for online information and content on vendor websites “more valuable sources of buying information than face-to-face conversations” (Schaub, 2011). The BuyerSphere 2012 report paints a fairly detailed picture of the ways in which business purchasers use information as part of the sales cycle. For example, the BuyerSphere research shows that buyers consider word of mouth and Web searches together to be both the most frequently used and the most useful sources of information when researching a potential purchase. Buyers rated word of mouth most useful and said that they conducted Web searches more frequently than engaging in word-of-mouth interactions.

In general, and with good reason, technical communicators tend to focus on the “install-use-troubleshoot” aspects of a product. However, the research shows that technical content is a powerful driver across the entire purchasing and product-use lifecycle, including the buy phase. In the knowledge economy, technical content is as strategic a business asset, and as closely connected to revenue streams and the sales cycle, as any marketing content designed specifically for pre-sales contexts.

Web searches are fairly self-explanatory, but we should frame this “word-of-mouth” concept against new technologies. To clarify, the BuyerSphere 2012 report tells us that buyers use social media as their “word-of-mouth” activity only 21% of the time (56% said that they employ “other” word-of-mouth methods). 21% isn’t a very big number, but let’s break it down even further. Buyers aged 30 years old or less actually rated social media more useful than any other word-of-mouth methods, reporting that they use social media to find information 49% of the time. Compare that to 50- to 60-year-old buyers who do so 18% of the time. As the BuyerSphere report puts it, to buyers age 30 or younger, “[social media] is word of mouth!” (emphasis ours). And how is all of this social media being used? According to BuyerSphere 2012, 67% of buyers use community sites to find or link to “published information,” and 60% of buyers use LinkedIn, Facebook, and Twitter (analyzed in aggregate) in similar ways.

IDC research, while not focused on social media specifically, confirms the importance to the buyer’s journey of “digital” information in all its forms. In its “Customer Creation Framework,” IDC shows that the initial exploration phase of the buyer’s journey begins with “digital dialogue” in which the “Internet-empowered buyer” seeks answers to their technical questions about a product or service (Schaub, 2012).

Other researchers tie in social media as well. ThomasNet’s research tells us that buyers use social media to research products and services; more specifically, 25% of industrial buyers use LinkedIn as part of their purchase process. ThomasNet quotes one buyer who said, “Social media has made it easier to see more about the services and tools available and help us to make our purchases.” Another buyer in the ThomasNet social media study reported that the “Opinions of others count … [they] nearly always save steps and help to avoid pitfalls others may have experienced or likewise, [achieve] benefits they have had.”

So let’s net this out. Web searches are critical to the buying process. Word of mouth, increasingly enabled by social media, is critical to the buying process. The motivating force behind buyers’ Web searches and social media use is to find content in order to make decisions and take action. Content is a catalyst for action at every phase of the product purchase-and-use lifecycle and—likely most important for our business colleagues—it is becoming an ever-more-critical catalyst for actual buying decisions and behavior.

**Truth #5: Content does not stand alone**

Content exists in an ecosystem that requires conscious care, as well as the partnership of many players. To address content strategy challenges, we must take a systems-thinking approach to growing and encouraging the health of the entire content ecosystem—not just the effectiveness of individual content piece-parts. We must recognize that the healthiest content ecosystems feature client-centered content that is interconnected and interdependent. Healthy content ecosystems feature content objects that work together to support clients’ business goals.

At IBM, we envision our content ecosystem as having three primary components that span the continuum of pre- and post-sales content:

1. **Official IBM content that is embedded in our products’ user interfaces or that stands alone on the Web or on client intranets.**
2. **Supplemental IBM content that complements official content with case studies, reference implementations, education, demos, presentations, and best practices.**
3. **Social content, including collaborative content that grows out of IBM-sponsored communities, as well as completely organic content found in places like LinkedIn and Twitter.**

An effective content strategy must address a content ecosystem that is alive—if you’re using social media effectively, your content ecosystem and the content itself
is dynamic, constantly evolving. The ecosystem needs cultivation to ensure that high-value content is highly visible: “content … must be of high value and relevance in an increasingly crowded (and noisy) environment” (Gerard, 5 March 2013).

**Truth #6: Successful products depend on content**

Product information experience designers—information professionals who focus on the content ecosystem and experience that surrounds products—know that content is embedded in product user interfaces (UIs). Content is:

- The labels and text that appears within windows and panels
- The power behind the progression of wizards and advisors
- The heart of the error and informational messages that alert users to significant events and consequences
- The help systems that accompany the user interface and assist the user in manipulating features and functions to achieve desired outcomes
- The social and community-based content that many products are beginning to embed directly in the primary user interface

In addition to all of this product-embedded content, many products also link to additional content—things like education, samples, examples, patterns, best practices, and how-tos that span products or interfaces. When these links are presented in the product’s UI, the user perceives this additional content as part of the user interface; though not hard-coded into the product interface, the linking relationship causes the user to experience the stand-alone content as part of the product.

When talking about products we are by nature also talking about content, whether we intend to or not. In fact, if we want to get philosophical about it, most things that interest humans can be expressed as content, interaction, or both. Take the example of photography, simplified for our purposes. Is taking a good picture something you know about, something you do, or a combination of both? The answer depends on who you are. If you are an art critic, you might know enough about photography to evaluate it but not be able to create a compelling image yourself. If you want to become a professional photographer, you need to both know about the elements of composition, for example, and have mastered the technical aspects of capturing an image properly. If you are working in government licensing office for motorized vehicles, you may just want to take the pictures of busy license applicants as quickly as possible.

Product interfaces and content are designed in much the same way:

- We research target user personas, goals, and tasks
- We synthesize user data with product strategy to create usable, goal-oriented solutions that meet business requirements
- We validate and iterate with stakeholders

Product interaction designers, visual designers, and information experience designers should work together to determine whether ideas and tasks are best expressed as interaction (“do”), content (“know”), or both. Sometimes a simple programmatic interaction could replace pages of text and, in so doing, delight the user with function that eliminates work. Sometimes a user must complete a task in a product user interface that looks simple but that requires a wealth of knowledge in order to make the best decision. See our point?

Many of our business colleagues in product design, development, and management buy in to the value of user experience design. (You can thank your iPod for that—there’s lots we could say about the ways that consumer products have influenced all kinds of buyers, including IT buyers.) We need to change our business counterparts’ vision of the meaning of the user experience in the context of product design, development, and management. User experience design work that focuses solely on interaction—or even interaction and visual design—and fails to address the content ecosystem is only telling part of the story. The most successful products employ a smart combination of things that are about “knowing” (content) with things that are about “doing” (interaction). We cannot separate content from our products. By extension, we cannot separate content from product design, development, and management. Content strategy must be a part of product planning and go-to-market activities from beginning to end; product development and the supporting business structures, processes, and artifacts must embrace content strategy as key to their success.

**Better True Stories About Content**

Having clarified the nature and value of content, we at IBM set out to tell a story that would inspire our business colleagues to invest in new content strategy initiatives. As information professionals, we are trained to think “outside-in” about our audiences and their content needs; we know the impact of high-value, high-quality content in the total information experience. But as we talk about the business value of content within IBM, it is clear that we have not done a good job of telling the right story for our audience. It is not apparent that all of our business colleagues across IBM understand the business value of content and, at the time we started this journey, it was unclear whether our customers did either in the sense that we couldn’t prove it. This is what we want to understand, and we sought out proof to validate our theory: that content and an effective end-to-end information experience is very important to IBM clients and, as a result, it should be very important to IBM.

In 2010, we launched a simple Web survey for IBM clients and prospective clients, advertised and accessible from our primary delivery vehicles for technical product information. Because of its location, the survey targeted the very people who actively use our post-sales technical product information. In addition to a handful of questions about their roles, we asked survey-takers a single crucial
question. We asked them, “For the products and solutions that you use in your job, rate the importance of high-quality technical information” on the following items:
1. Their initial purchase decisions
2. Their perception of product quality
3. Their overall satisfaction with the product
4. Their perception of the company that produced the technical information

And the results flowed in. At the time of this writing, we have data from 179 survey respondents (none of whom are IBM employees) who tell us this:
- 89.8% say that high-quality technical information is either important or very important to their purchase decisions
- 97.2% say that high-quality technical information is either important or very important to their perceptions of product quality
- 93.8% say that high-quality technical information is either important or very important to their product satisfaction
- 97.2% say that high-quality technical information is either important or very important to their perceptions of the company who produced the information

Note the number of survey respondents who answered “very important” in the summary of our survey data below:

![Image](Image)

**Figure 2. Results of IBM “Importance of High-Quality Technical Information” Survey**

*Finally* we had a start on collecting the data to articulate our story—the right story—to a business audience. We had metrics that matter in the marketplace:
- Purchase decisions—our direct link to the revenue stream
- Product quality—our direct link to customer loyalty
- Product satisfaction—our direct link to ROI
- Company perception—our direct link to mindshare

In the focus groups that followed, we discovered further validation—validation that requires a brief IBM history lesson to put into context. In IBM’s early years, professional technical communicators lived within product development organizations and had the sole mission to create official product documentation. Over time, because of the sheer size of IBM and the ease of publishing online, everyone can be an author. Silos of content creators blossomed across our various brands and business units (product documentation teams, service and support teams, technical sales, training, and so on). In talking with clients, we heard that the inconsistencies in content produced in different corners of the corporation had a profound impact on their success. Our customers told us without fail that high-quality technical information is important to them, and the additional validation we received concerned the fact that our customers don’t care and shouldn’t be aware of which silo produced the information. They said they wanted a “one IBM” information experience. We knew this instinctively, but we hadn’t properly collected and analyzed the direct customer feedback or data to back up that professional intuition.

In the final analysis, these clients *told us* that they want and need better product consumability, and that content is a critical component of product consumability. Across our survey data and focus groups, our clients confirmed that content is a strategic business asset.

**Best True Stories About Content—Join Us!**

We’re learning to tell a better story about content. We did the work to equip ourselves with the right data—that is, metrics that go beyond implied value to prove direct ties between content and our company’s bottom line. As a result, we are able to tell a story that resonates significantly better—and more valuably for us—across our company. The broader IBM business listens to clients and more and more of the business units within the company are declaring high-quality content to be a business imperative. One key change that we’ve seen in response to better story-telling about content involves a new position inside IBM. Our executives created the role of client information quality executive with a “total information experience” mission. This “total information experience” mission is now advancing at IBM through the efforts of technical communicators within traditional documentation roles. It’s also advancing thanks to those who create content in other business units and who know the value of high-quality content and the importance of the information experience to business objectives. Who better than content people to drive a content-centric revolution? Who better than information professionals to drive innovative and effective *total* information experiences?

Our learning process centered on discovering what matters most—to our clients and to the IBM business. In many ways this is about time-tested audience analysis and the principles of outside-in design, but it goes beyond that. For us, this process involved learning new skills: how to speak the language of business and how to identify metrics that really matter—not just buzzwords that sound good on the surface but fundamentally fail to contribute to the bottom line.

We’ve still got a long way to go—in our organization and probably yours. Now we ask the technical communication industry to join us in this transformation. The fact is that
there’s just not a lot of data out there about the business value of content and the total information experience. Our entire industry needs to ensure that we collect the right data and conduct meaningful analysis to tell the best story. The best story about content is one that is true, that is based on core business metrics, and that inspires our colleagues in product design, development, management, finance, sales, and more with a vision for information experiences of the future that make a profound difference in the marketplace. Join us on the journey toward proving the business value of content. Imagine what we can accomplish together to transform our business colleagues into believers in the business value of content! Imagine what we can accomplish once everyone believes! 

ALYSON RILEY’S mother swears that her first word was actually a complete sentence, and she began her career as an information architect shortly thereafter by developing organization schemes for her toy dinosaurs and horses. Alyson is passionate about the value of content in her work as a senior content strategist and information architect on IBM’s corporate Total Information Experience team. Alyson serves as the corporate lead for IBM’s information architecture council, drives IBM’s corporate-level efforts to define the next generation of strategy for technical content, and consults with IBM content teams worldwide to develop effective content strategies. Alyson co-authors with Andrea Ames “The Strategic IA” column for Intercom magazine. You can follow Alyson on Twitter @ak_riley or find her on LinkedIn (www.linkedin.com/in/alysonriley).

ANDREA L. AMES is an information experience strategist, architect, and designer at IBM, and she designed, coordinates, and teaches for UCSC in Silicon Valley technical writing and communication program. Her mantras are “I don’t write doc; I solve user and business problems”; “installation is not a user goal”, and “think more, write less!” She is Fellow and past president (2004–2005) of STC and a distinguished engineer of ACM (the first technical communicator to achieve this distinction). She has published two award-winning technical books and more than 50 papers and articles and speaks regularly at conferences and professional meetings around the world. Follow her on Twitter @aames or LinkedIn (www.linkedin.com/in/andreaames), and check out her blog (http://thinkmorewhitelist.wordpress.com).

EILEEN JONES is IBM’s client information quality executive and the director of IBM information development (ID). In this role, Eileen is responsible at the corporate level for the quality of IBM’s client-facing information and IBM’s Total Information Experience (TIE) strategy. She directs the team responsible for designing the IBM information experience, leading the IBM content community, developing IBM’s content standards, enabling the community of IBM content producers with education and collateral, delivering TIE and ID tools and technologies, providing content development infrastructure and services, and providing technical leadership to the development of the Oasis DITA standard. Eileen leads the total information experience transformation in IBM with an outside-in focus on content as a strategic business asset. Eileen specializes in driving organizational cohesiveness, efficiency, effectiveness, and strategic alignment. Connect with Eileen on LinkedIn (www.linkedin.com/in/eileenjones).

REFERENCES


Editor’s Note: Nicky Bleiel was formally installed as STC President at the Annual Business Meeting during the Summit on Monday, 6 May. Below is an early draft of her planned remarks, provided to Intercom to share with the entire Society.

IT IS TRULY AN HONOR to stand before you today. It is a privilege to serve my profession through STC.

The growth of our profession is dependent on a robust, active, and vibrant STC. I take very seriously the responsibility you’ve entrusted me with, and I am so excited that I get to work together with the dedicated volunteers, members, staff, and Board of Directors of STC on the important work of advancing the profession of technical communication.

In this, our 60th year, many opportunities are before us. We have a long history. In 1953, two organizations—The Society of Technical Writers and the Association of Technical Writers and Editors—were founded. They merged in 1957 to form the Society of Technical Writers and Editors. STWE merged with the Technical Publishing Society in 1960 and in 1971, the organization changed its name to the Society for Technical Communication. We were born.

We have a strong foundation. Over the past 60 years, STC has built a variety of programs to grow the profession and serve its members, including award-winning publications, geographic and virtual communities, educational opportunities—including this annual Technical Communication Summit—competitions, work with the Bureau of Labor Statistics, recognitions, certification, and so much more.

We have a new executive director, Chris Lyons. Chris is only the sixth executive director in our long history, and I am confident in his ability to work with the members, Board, and staff to move STC and the profession forward. Welcome to STC, Chris!

And most importantly, at the core, is our interesting, ever-changing, valuable profession. We provide the world with the information it needs to get all kinds of jobs—big and small—done safely and accurately, in situations as diverse as maintaining an airplane, obtaining a grant, dispensing medications in hospitals, or purchasing an item online. We don’t work only in words, graphics, and video using a wide variety of tools and technologies; we design that information so it is findable, accessible, concise, and appropriate. And we are always looking for ways to do it better, to serve an audience that is not only diverse but accessing that information in a myriad of ways.

We need to embrace these opportunities. And we plan to.

Albert Einstein said, “All that is valuable in human society depends upon the opportunity for development accorded the individual.” STC is about opportunity, pure and simple. There are opportunities to lead, teach, learn, mentor, write, serve, judge and win awards, and interact with other professionals. Every technical communicator should want to be a member, because STC is a rich source of opportunity. And every STC member should be secure in the fact that STC is working hard on everyone’s behalf to advance the profession of technical communication.

Thanks for your kind attention, and thanks for your support of STC. Let’s all take the opportunity to make STC’s 60th year one of its finest.

STC Names “Most Improved Community” and “Community of the Year” Winners

STC UNVEILED THE WINNERS of two community awards at the 2013 Summit: The Most Improved Community and the Community of the Year.

The Most Improved Community is given to the community that “stepped up their game” the most from one year to the next, based on their applications for the Community Achievement Award. This year the award goes to the Houston Chapter.

The Community of the Year Award is presented to the community that had the highest score of all of the outstanding Communities of Distinction. The third annual Community of the Year Award goes to the Rochester Chapter.

Congratulations to the leadership and members of both communities!
Chris Lyons Introduced as STC’s Sixth Executive Director

AFTER AN IN-DEPTH SEARCH, STC is pleased to introduce our new executive director, Chris Lyons. Chris is the sixth executive director in the 60-year history of the Society.

Chris Lyons is a seasoned manager. A former Naval officer, his professional career began after graduating from the Sloan business school at MIT. He worked for many years at IBM Global Services in a variety of roles, including strategy consultant and practice manager, principal at one of the IBM e-Business Innovation Centers, and account manager. He then started his own management consulting practice focused on assisting associations and nonprofits.

Lyons is enthusiastic about the Society and the industry. “It’s an exciting time. The profession is vibrant, providing a critical and growing need,” he commented. “Our membership is smart, thoughtful, and energetic. I am looking forward to meeting all of them and understanding how STC can best advance their educational and career goals as well as the science of the discipline. I am enthusiastic about getting to work with the Board defining our future direction and leading the Society in its next phase of growth.”

“I am personally thrilled to have Chris Lyons as the executive director, and public face, of the Society for Technical Communication,” said STC Immediate Past President Alan Houser. “I hope you will be thrilled as well.”

STC President Nicky Bleiel headed the search committee. “The committee worked extremely hard to find Chris and we’re all very pleased that he has accepted. I’d like to thank Lori Fisher, Rob Houser, Saul Carliner, and Mark Mecklenborg for their service to the Society.”

Read more about Chris Lyons and his vision for STC on the Staff Directory online at www.stc.org/about-stc/leadership/staff-directory.

Ken Cook and Dan Voss Honored with 2013 President’s Award

THE PRESIDENT’S AWARD honors one or more persons or institutions that have made distinguished contributions to the profession or the Society. The STC president announced the names of this year’s recipients during the opening session of the Society’s annual conference.

The first honoree is Ken Cook. Ken is president, CEO, and Chairman of Ken Cook Co., a leading technical communication business with a staff of professionals in Milwaukee, WI. Ken is president of the National Coalition for Aviation and Space Education. He is also a past president and Fellow in the Society for Technical Communication. Currently, he is an active member of the STC Development Task Force and is dedicated to supporting STC both financially and socially. His citation reads:

For your continued financial and professional support of the Society’s mission, for your long history of encouraging technical communicators, and for your business success that is a testament to the power and value of technical communication.

The second honoree is Dan Voss. Dan is a member of the STC Orlando–Central Florida Chapter, the Academic and AccessAbility SIGs, and is an STC Fellow. He is also the Student Affairs Outreach for the Community Affairs Committee. Dan is a 34-year veteran proposal writer and technical marketing/media communicator with Lockheed Martin Missiles and Fire Control (LMMFC) in Orlando, FL, and a 19-year adjunct instructor for Webster University. He has presented at more than 20 STC international conferences, coauthored 4 articles for Technical Communication, and coauthored the textbook Ethics in Technical Communication: Shades of Gray (1997). He has received numerous awards at local and national levels, both within STC and Lockheed Martin, and is the only non-engineer ever to receive LMMFC’s coveted Author-of-the-Year award. His citation reads:

For your tireless promotion of the Society’s Student Mentoring Program and your outreach to the next generation of Society members.

Congratulations to both of these gentlemen, and thank you for your service to STC and to the profession of technical communication.
In Memoriam: George Hoerter, 1932–2013

BY MARTHA SIPPEL | Fellow

GEORGE HOERTER, STC FELLOWSHIP and long-time member of STC, the Rocky Mountain Chapter (RMC), and the AccessAbility SIG passed away on 12 April after a short illness. George meant so much to so many people throughout his STC career, which began in 1975.

George was never “just a member.” He began serving the Society in 1984 when he was elected vice president of RMC. From 1984 to 1988, he fulfilled the roles of RMC vice president, president (for two consecutive years), and past president. George was the RMC treasurer from 1991 to 1997 and also served the chapter as a competition judge, conference speaker, membership manager, and scholarship manager.

On the international level, George was elected and served as Society treasurer from 1987 to 1991, and was appointed Society assistant treasurer from 1991 to 1995. He was a conference finance manager; a member of the compensation policy, finance, and conference advisory committees; and co-manager of the Chapter and Regional Conference Committee. George attended 16 annual conferences, presented 5 times, and moderated 5 sessions. Read more about George’s accomplishments at www.stcrmc.org/documents/open/about-fellowsgeorgehoerter.

The RMC established the “George E. Hoerter Professional Development/Award/Scholarship” in 1990 in recognition of his contribution to the chapter and his international service as Society treasurer. For more than two decades, the RMC was pleased to be able to provide scholarship funds to many undergraduates and graduates to help them get started in technical communication or ancillary fields.

George retired after 37 years working as technical communicator manager, publications and services, for Martin Marietta Astronautics Group.

George’s consistent encouragement and expectation of excellence forced many RMC members to stretch ourselves and grow professionally. For over 30 years, many past and present RMC members owe thanks to George for his excellent stewardship of the chapter’s finances, his quiet presence at the door greeting people and taking the time to connect them with a mentor or volunteer position, and his mentoring and care of us as we launched our careers. He is greatly loved and will be sorely missed.

George’s family has posted a memorial page where you can leave stories, documents, or pictures of George. Please share any memories you have at www.archdenmort.org/sitemaker/sites/ARCHDI1/obit.cgi?page=stories&user_id=970658.

Pacesetter Awards

THE PACESETTER AWARD recognizes communities for the successful implementation of a single beneficial innovation that may be replicated by other STC communities. It honors those communities that have done something unique indicating progress in their programs or growth. Congratulations to the honorees.

Carolina
For developing a mobile application that enables pervasive and updated communication to mobile device users while promoting both STC Carolina community and the Society.

Chicago
For increasing member engagement through a comprehensive social media approach that allows open, on-going contributions; reinforces involvement in the community; and keeps focus on the STC Chicago community, its activities, and the profession.

New York Metro
For adapting Agile methodology to community management by allowing volunteers to accept manageable tasks, leaders to track progress regularly, and the STC New York Metro community to achieve more in an organized and constantly improving way.

Northeast Ohio
For creating the NEO STC book club that provides members opportunities to select books appropriate to the technical communication profession, get exposure to new viewpoints, and share personal knowledge while engaging in stimulating discussions.

Rocky Mountain
For creating additional meeting opportunities for a widespread membership, including webinars, training sessions, workshops, a museum tour, and networking events, while facilitating the professional development of STC Rocky Mountain.

Washington, DC–Baltimore
For jointly planning and executing Tech the Halls! Holiday Party in coordination with local communication organizations to celebrate the DC area’s status as a tech mecca while providing STC Washington, DC–Baltimore members with management experience, networking opportunities, and exposure to diverse groups of professional communicators.
WordPress and LearnDash

BY MARC LEE | Senior Member

IN THIS COLUMN, I discuss WordPress, with particular emphasis on a WordPress plug-in, LearnDash, that can transform a WordPress site into a learning management system.

Background
Most readers will already be familiar with or will have at least heard of WordPress (WP)—probably best known as a blogging platform. It’s freeware that’s easy to download and set up. The WordPress community is huge (approximately 15% of the top one million websites worldwide are on the WP platform) and anyone interested in setting up a WP site can just download the package from the WordPress website.

There are two basic options if you want WordPress for your own use:
- You host the site
- You have WordPress host your site

Currently, they seem to be emphasizing the self-hosting option. If you decide to host yourself (or host on your current ISP), you’ll need to check that the host provides the basic platform (Web server, middle tier, and database) which is Apache, MySQL, and PHP (sometimes referred to as a “LAMP stack”). The LAMP acronym simply lists the requirements, L for Linux, A for Apache, M for MySQL, and P for PHP. The platform can be hosted on Windows or Mac servers; Linux is not a requirement. Most host services will know right away what you’ll need for your WordPress install, and most have it set up already. Of course, through your hosting service you’ll need a domain name for your site. Another item you should have is an FTP client which will allow you to upload media assets to your site. There is a certain folder on your site where you should upload media files such as images, videos, PDFs, or other assets you’ll want shown.

WordPress: Where HTML, Structure, and Content are Data

If you’re not familiar with WordPress, it’s a bit hard to explain exactly what it is. It’s neither a template (though it has templates) nor a programming language (though it uses PHP). As a website person, you probably know HTML, CSS, and Javascript. The secret sauce in WordPress is that, while it has those elements, it relies mainly on a database in MySQL. The HTML and your text actually are stored as data rather than as files. There are no HTML or JS files (or few) in a WordPress environment. But yet, in the end, the final pages shown in the browser are made up of the usual brew of HTML and Javascript, which are the things a browser can understand.

Once you download the basic files from the WordPress site to your domain, your biggest hurdle may be to set up the connection to the database. This requires following the written procedures exactly, but if you do, everything will work. Once you have that and your username and password set up, you’re practically in...

Figure 1 shows one of my test sites, but yours will look remarkably similar. Once you are this far, you are ready to start working on your blog posts or other WordPress content.

**The Dashboard**

For the next steps, your work will be almost exclusively with the WordPress Dashboard (Figure 2).

The Dashboard is the administrative hub of your site. There is almost no programming required unless you decide to get very deep into customization. You can make your site unique to your topic and interests strictly on the Dashboard. In fact, it’s almost never a good idea to edit the basic files in what is called the WordPress “core.” The core consists of several dozen files, mostly PHP. A single mistake in typing—even a single comma out of place—will break your site. Ninety-nine percent of what you need to do, including a large amount of customization, can be done with no programming on the Dashboard.

**WordPress Elements**

The objects you’ll encounter in administering your site and filling it with content are:

- Themes
- Posts
- Pages
- Categories
- Widgets
- Plug-ins

These are the main components in any WP site and you should become familiar with each and understand its purpose clearly.

A WordPress site consists primarily of posts, which are the blog articles you write. You create these posts in the Dashboard with a content editor very similar to a primitive version of Microsoft Word. Let’s say your blog is about technical communication. You may want to blog about training for this profession, different sub-disciplines, common tools, technical publications in business and industry, and any number of other topics. Each topic can be a blog, or short article, and as you write and publish them they will automatically show up on your site, generally in the order you publish them (but that, like most aspects of your site, is configurable).

Themes determine the appearance, colors, fonts, arrangement, and look/feel of your site. There are thousands of free themes you can download and install from the Dashboard. Each one operates similarly to most of the others but can have very different appearance from others; WP makes it extremely easy to play with the look and feel by exchanging and trying themes at will, and most will just load and present your content with no complaints or errors because of the consistent architecture. Pages are content articles like posts except that they are organized differently from posts and appear in a different order. Categories are structural elements which you create. So, for example, in your technical communication blog you may want to subdivide your posts into categories like: “technical
communication career options,” “main responsibilities of a technical communicator,” “training for technical communication professionals,” “tools used in the profession,” and so on. You create these and then tag each post with one or more categories; this begins to create the structure for your site.

Widgets and plug-ins are downloadable to your Dashboard from individual developers. They’re not built in like categories. Widgets are home page displays such as a calendar or RSS feeds that you can drag and drop onto your site. There are literally thousands of them. Compared to widgets, plug-ins are slightly more powerful downloads that do one of a thousand specific functions, such as protect your site from hackers, provide SEO capabilities, give direct embed capabilities to certain file types, and—which leads us to the second topic—create a learning management system out of your WordPress site. One final point: virtually everything I’ve described so far is free, open source. There are thousands of developers who create widgets and plug-ins essentially as gifts to the WordPress community. There are a few that cost something—but the prices are all reasonable.

**LearnDash and the TinCan API**

For those that know learning management systems (LMSs)—learning portals used by elearning and training departments in most large companies—the SCORM (Sharable Content Object Reference Model) standard is well known and represents the standard for transferring data from a course, lesson, or quiz to the intranet record store. Most up-to-date LMSs and many elearning development tools such as Captivate and Articulate support the SCORM standard—usually with one click.

Following on after SCORM, the TinCan API is the next generation of data standard for corporate learning management. Instead of requiring that a course be structured in a certain way and only course completion or the student score communicated, the TinCan API allows many activities to be noted on the corporate student record area such as “participating in a forum,” “watching a video,” “hearing a lecture,” and other more free-form (but still educationally valid) activities. This standard, while still in beta release, will make learning management much more consistent with current trends in social media, with its more open-ended learning activities in agreement with interests of gen-X and millennial learners. I’ve heard one person describe it as “Facebook for learners.” In addition, it supports mobile learning on iPad, iPhone, Android, and Windows which is, so far, not true of SCORM.

LearnDash is a plug-in to any WordPress site. It now carries a license fee of $69 and is currently in release 1.2 with a LearnDash Plus release expected soon. Along with posts and pages, this new LMS allows certain other content types to be created from the Dashboard in addition to posts and pages: courses, lessons, quizzes, and certificates. One important built-in feature is e-commerce, which makes it seamless to require a PayPal payment by a user prior to being authorized to take any course.

The LearnDash LMS has integrated its plug-in with Wax LRS as the provider of TinCan API. You need to establish a separate account for learning records with them. Once you do, their system is plugged into the Dashboard and looks like Figure 4.

**Conclusion**

As you can see, this is just a brief overview of the many, many possibilities of both WordPress and LearnDash. If you want in on the ground floor of something new, I urge you to give LearnDash a try. Drop me a line to let me know how it goes for you.

**Websites to Check**

- [http://wordpress.org](http://wordpress.org)
- [http://scorm.com](http://scorm.com)
- [www.tincanapi.com](http://www.tincanapi.com)
- [www.learndash.com](http://www.learndash.com)

MARC LEE (marc@mlmultimedia.com) is owner of MLMultimedia, a multimedia and e-learning consultancy. Marc has been a member of the Rocky Mountain Chapter for about 20 years and was chapter president from 2004–2005. Marc has a PhD in English from the University of Wisconsin-Milwaukee.
I HAVE A social media habit. But it’s not the kind of habit you might think. It doesn’t encompass my every waking hour. I engage once in the morning and then pretty much leave it alone after that. Here’s what I generally do every day.

First, I start with Facebook. I scroll through to find anything interesting, especially posts from my three kids. Then I check out LinkedIn. Who’s invited me to connect? Who’s endorsed me? Who’s looked at my profile? I check out an article or a random post. I don’t muck much with Twitter except to search on #stcor13 and #stc13. After looking at these two searches, I usually just close it. I might check out Instagram, but usually only because one of my children has posted there. Next, I check out the STC Board of Directors site to read any new posts. And I check my iPhone to see if there is any pushed content I find interesting.

One morning, though, things were particularly active. I kept getting new posts all over the place. Bing here, ping there, bop over there. (Ok, not audibly; metaphorically, but you get the idea.) I could barely keep up. For some reason that I didn’t totally fathom, I wanted to check them all out. It quickly became too much, moving back and forth, forth and back, that it all became well … chaotic!

When that thought hit me, it just brought everything to a halt. Is social media just chaos, and we’ve all been sucked in to the flurry? While my computer and smartphone kept pinging and popping, I began to wonder. What if social media is a manifestation of the chaos theory? Well, that just might explain a lot.

So off to the Internet to refresh my memory about chaos theory. First, I learned that chaos theory is a field of mathematics. Right away, I liked it. After all, I was a math major in university. A major concept of chaos theory is the butterfly effect. A small change in one place—the proverbial butterfly flapping—has a profound effect on some cataclysmic event somewhere else—a tsunami, for instance. And here’s the kicker. In math terms, such a succession of events is nonlinear. In other words, there is no direct connection between the two events.

Mathematics, of course, has a more technical explanation: something about dynamical systems being deterministic, but sensitive to initial conditions (I’ll spare you the details). Suffice it to say that even though one event might lead directly to another event, a tiny change in that initial event can cause all hell to break loose.

Okay, so back to social media. Does this make sense? Why was I getting all these posts in such a short period of time? Did some Monarch flap its wings somewhere? Maybe social media as chaos doesn’t refer to my particular situation at all, but to a larger condition of the greater social media, the one in which everyone plays.

One post can certainly cause various events. Tweet that STC is holding its annual conference, and people register. That’s a direct and expected result. There have been times, though, when one small post results in completely overwhelming and unexpected results. I’ve seen it on Facebook and on Twitter. You probably have, too.

In the end, I guess, that’s the greatest attribute of social media: the power to engender cataclysmic social disruption and change. There’s not much that is loftier than that.

A final note: This is my last column as your social media columnist. It’s been a great ride writing this column. And Editor Liz Pohland has been patient (my favorite trait), thoughtful, and considerate. But for me, social media has become too big a distraction, and a convenient excuse to procrastinate. I act with purpose, and while some of my social media interactions are certainly purposeful, most of them are in search of purpose. Social media has become (I’m going to say something potentially blasphemous here) what television has long since become: titillating but ultimately forgettable. Or maybe I just got tired of waiting to see that completely overwhelming and unexpected result from one of my posts.

Social media has transformed the way we communicate. This column discusses the intricacies and ramifications that social media has on our everyday personal and professional lives. Suggestions for topics are welcome. Email me at rich.maggiani@solari.net.
Mark Your Calendar
Organization events across the globe

F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org.

1 28–31 May
Join the Association of Proposal Management Professionals for their Bid & Proposal Con at the Westin Peachtree Plaza in Atlanta, GA. For details: APMP
www.apmp.org

2 25–7 June
The Society for Scholarly Publishing will hold its 35th Annual Meeting at the San Francisco Marriott Marquis in San Francisco, CA, with a theme of "Surviving (and Thriving!) in Our Multi-Access World: Navigating the New Publishing Paradigm." For more information, contact: +1 (303) 422-3914 info@sspnet.org
www.sspnet.org/

3 9–12 July
The UXPA 2013 International Conference will be held at the Washington Hilton in Washington, DC. For more information, contact: UXPA conf2013@uxpa.org
www.uxpa2013.org

4 15–17 July
The Professional Communication Society (PCS) of the Institute of Electrical and Electronic Engineers (IEEE) will hold its 2013 IPCC. Beyond Borders: Communicating Globally, at the University of British Columbia in Vancouver, BC, Canada. For more information, contact: PCS
http://pcs.ieee.org/ipcc2013/

5 15–19 July
The International Terminology Summer School (TSS 2013) will take place at University of Cologne in Cologne, Germany. TSS 2013 is jointly organized by the Cologne University of Applied Sciences, Institute for Information Management, and TermNet. For more information, contact: TermNet
+43 1 23060 3965
events@termnet.org
www.termnet.org/english/events/tss_2013

6 30 Sept–4 Oct
The Human Factors and Ergonomics Society (HFES) will hold its 57th annual meeting at the Hilton San Diego Bayfront in San Diego, CA. For more information, contact: HFES
+1 (310) 394-1811
info@hfes.org
www.hfes.org/Web/HFESMeetings/2013annualmeeting.html

7 10–12 Oct
The Rocky Mountain Modern Language Association (RMMLA) is holding its annual conference in Vancouver, WA, at the Hilton Vancouver Washington from 10–12 October. For more information, contact: RMMLA
www.rmmla.org

8 26–29 Oct
The Public Relations Society of America (PRSA) hosts their international conference, "One World: Connection. Community. Collaboration" at the Philadelphia Marriott Downtown in Philadelphia, PA. For more information, contact: PRSA
+1 (800) 350-0111
www.prsa.org/Conferences/InternationalConference/

9 1–6 Nov
The American Society for Information Science and Technology (ASIS&T) will hold its Annual Meeting, with a theme of "Beyond the Cloud: Rethinking Information Boundaries," at the Centre Sheraton in Montréal, QC, Canada. For more information, contact: ASIS&T
asis@asis.org
www.asis.org/assist2013/am13cfp.html

10 6–9 Nov
The American Medical Writers Association (AMWA) will hold its 73rd annual conference in Columbus, OH. For more information, contact: AMWA
+1 (301) 294-5303
amwa@amwa.org
www.amwa.org/default.asp?id=575

11 6–9 Nov
The American Translators Association (ATA) will hold its 54th annual conference at the Marriott Rivercenter in San Antonio, TX. For more information, contact: ATA
+1 (703) 683-6100
ata@atanet.org
www.atanet.org/conf/2013
From an Idea to a Product

MIKE UNWALLA | Senior Member

IN OCTOBER 2012, TechScribe released an open-source term checker for the controlled language ASD-STE100 (www.asd-ste100.org). Approximately nine years earlier, I had the initial idea.

A controlled language helps to make text as clear as possible. For example, in ASD-STE100, the term make sure is approved, but synonyms such as check, confirm, ensure, insure, and verify are not approved.

In 2003, I thought about buying software to help me conform to ASD-STE100. Software was available, but it cost many thousands of dollars. I did not buy software. Instead, I tried to customize Microsoft Word.

My first idea was to use an exclude dictionary, but to exclude a multi-word term is not possible. I tried to “hack” the Microsoft Word dictionary, but that attempt was not successful. I tried to make Word use only custom dictionaries, but that is not possible (https://groups.google.com/forum/#!topic/microsoft.public.word.spelling.grammar/AeKcZSmS80Y).

For four years, I did not think about the problem. Then, at the ISTC technical communication conference in 2007, I met an expert VB coder. She wrote some Word macros that highlight different types of terms in different colors.

The macros are excellent, but they give no guidelines about the problems that they identify. For example, if a term is highlighted in yellow, I know that the term is not approved. However, the macros do not tell me whether approved alternatives exist. If an approved alternative exists, the macros do not tell me what it is.

By now, I wanted more than a lookup tool.

A local software developer was interested in the project and started to develop software. After some weeks, he lost interest.

I searched the Internet to find low-cost software that I could customize. Many times, I found software that initially appeared to be what I wanted. However, none of the software could deal with multi-word terms.

I found LanguageTool, which is open-source proofreading software (www.languagetool.org). Unfortunately, I did not evaluate LanguageTool sufficiently well to know that it was perfect for the project.

In 2009, I learned about the SALTcymru project (www.saltcymru.org), which is related to the Language Technologies Unit at Bangor University (www.bangor.ac.uk/canolfanbedwyr/technolegau_iaith.php.en). During the next few months, I exchanged email messages with members of the team, attended meetings, and spoke about internationalized English for international communication. We spoke about the possible development of software.

I thought that the term checker had a commercial future. Advice for business development was available from regional development agencies. I took what was available. I thought about price strategies, publicity, brand building, selling on the Internet ....

In 2010, TechScribe was awarded an innovation voucher, which is a small grant (www.innovateuk.org/delivering-innovation/innovation-vouchers.aspx). Now, money was available to pay for the development of prototype software. The Language Technologies Unit developed an online term checker for TechScribe (www.techscribe.co.uk/ta/ste2-term-checker-bangor-prototype.htm).

As proof-of-concept, the software from Bangor University is excellent. However, it is a lookup tool. Also, I cannot change the terms that are in the software.

In 2011, I looked again at LanguageTool. Rules for a language are in two XML files. LanguageTool gives a framework in which to create an effective term checker. I decided to make the effort to learn how to make LanguageTool do what I wanted. After 18 months, I had a term checker that was sufficiently good to release.

The term checker is more than a lookup tool. For example, in ASD-STE100, the term pump is approved as a noun but not as a verb. The term checker finds the term pump only when it is used as a verb. The analysis uses pattern matching. For example, in the text “the X is ...”, X is a noun. X cannot be a verb or another part of speech. If the term pump is not in a pattern in which pump is a noun, then the term checker identifies the term as a possible error.

I continue to develop the LanguageTool rules for ASD-STE100. The project time is now more than 1350 hours. I hope to get a return on my investment by selling a term checker for ASD-STE100 issue 6.

A free term checker for ASD-STE100 issue 3 is on www.simplified-english.co.uk. Let me know what you think about it at mike@techscribe.co.uk.
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