Enterprise Content Management (ECM)
Delivery and Presentation

AIIM ECM Certificate programme

ECM Strategy → ECM Practitioner → ECM Specialist → Case Study

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ECM Practitioner Course Outline

Foundations
1. Introduction
2. Technologies & Functionality
3. Information Architecture

Tools & Instruments
4. Create & Capture
5. Metadata
6. Taxonomy
7. Security & Control
8. Process & Automation
9. Findability
10. Delivery & Presentation
11. Trends & Directions

Agenda
- The value of information delivery
- Basic techniques and concepts
- Content tools and challenges
- Presentation tools and opportunities
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SIAF

Marchand's Strategic Information Alignment Framework

Add value customers and markets
Minimise Risks market, financial, legal, operational risks
Reduce Costs transaction and processes
Create New Reality Intelligence (social, political, technological, etc)

Benefits of repurposing content

- Volume
  - Often hundreds of thousands of pages
- User empowerment
- Standardisation
- Ease of change
- Practicality

Personalisation = effective communication

- Mass communication is no longer “one size fits all”
- One-to-one communication
  - Customers
  - Employees
Dynamic customer content

- Content supports customer relationship
- Localized for geography, culture, language, time-zone, season, etc.
- Content customised to address the realities of each individual recipient
- Delivered in timely manner
- In right format and preferred delivery channel

Dynamic employee content

- Content supports business processes
- Localized for role, geography, language, time-zone, etc.
- Content customised to address the realities of each worker’s contextual use
- Delivered in timely manner
- In right format and preferred delivery channel
Dynamic integration of content

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Basic architectural considerations

- Separation of content and presentation
- WYSIWYG (Get) – false
- WYSIWYM (Mean) – ideal, flexible
- WYSIAYG (All You Get) – co-mingled

What is repurposing?

- Using information for more than one purpose or channel
- Component technologies
  - Web Content Management (WCM)
  - Document Management (DM)
  - Portal
  - Syndication
  - Synchronisation
  - Translation
  - Structured authoring
  - Templates
Repurposing

Think up front – think downstream

- What is the business reason to create this content?
- Who are the downstream users of this content?
- What are the approximate costs transform, integrate, migrate, re-enter this content from one format/system to another?
  - Time for re-entry
  - Cost to do “seamless” integration
  - Expected increased revenue
  - Faster response time to clients, etc.
- What level of structure/management is appropriate?
**Compete in the modern world**

- “Unstructured content is stupid and old-fashioned. It’s costly, complex, and does not generate a competitive advantage.”
  - Anne Mulcahy, Xerox Chairman and CEO

**Think modular**

- Recall earlier discussion of Information Architecture (IA)
  - Not just the components of ECM that can be re-arranged to suit business needs, but content itself

- “Modules” in IA thus far have been technical capabilities

- Breaking content down into smaller components than a document, book or other publication, enables a wide variety of capabilities

Values of structured content

- Can reduce the cost of translation and customisation
- Can improve information sharing and reuse
- Can support a “single source of the truth” across multiple content channels and formats
- But: structured content can take more effort to manage
  - Major change management challenges: authors and managers are most familiar with documents, not elements
  - Systems to manage chunks tend to be more complex and costly to design and run

Press release as structured content type

Structured content types have elements

Elements are:
- Named parts of a content type
- Individually stored and accessible units within a content type
- A basic unit of content
Chunking

- Elements...
  - Are stored separately, so they can be used independently
    - Often stored in database, but not essential
    - Indeed, not all database content is "structured"
  - XML is a common “persistence” representation, or management format

- Enables parts of a document to be re-used in other contexts
  - Essential to lightweight syndication

Syndicating the press release

- Elements “recomposed” for different channels/formats

- Content Management system can automatically generate from components in repository
Media can be structured too

- However, the tools and methods for decomposition and subsequent re-use are arguably more complex than in the text world
- But the concepts remain the same

Source: Cinegy

Automated flexible formatting

Source: csszengarden.com
The power of content presentation

- “The media is the message”
  - Marshall McLuhan, 1967

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Content tools and challenges

- Templates
- WCM
- DM
- Syndication
- Synchronisation
- Translation
- XML

Templates

- Degrees of sophistication
- Single template for a broad class of content
  - Memos, Proposals, Marketing collateral
- Cascading templates
  - Proposals for North America
  - Proposals for professional services in France
- Templates at metadata level
Web content management (WCM)

- Key features:
  - Control and prepare the content ready for publication
  - Automate key parts of the publishing process
  - When web pages are being built dynamically by a content management system, manual testing may need to be undertaken to ensure that all components fit together properly prior to publishing.
  - Presentation agnostic
  - Device-agnostic
  - Ability to easily create “accessible” content
  - Multiple authors - One publisher

Document management

- Key features:
  - Control and prepare the content ready for publication
  - Compound document management
  - Link control
  - Publishing sensitivity
  - Business continuity
Syndication

- Method of making content available to a range of outlets
- Synchronous or asynchronous
- “Web feeds” make modular content available to other sites, applications or individual subscribers

Synchronisation

- Synchronisation
  - Replication
    - One to Many
    - Real, not “just” virtual
Translation

- **Language**
  - E.g., English to French

- **Mark-up**
  - E.g., MS Word to XML

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Templates

- Degrees of sophistication
- Framework for customised presentation

Portals

- Provide a framework for the presentation and integration of content, community and process into a single point of access (SPOA)
- Key features of portals include:
  - Access controls
  - High levels of integration capabilities among enterprise repositories
  - Syndication of content, data and processes

Source: Delphi Group (1999)
Types of personalisation

- Behavioural
- Preferences-based
- Profile-based
- Device-based
Dynamic web pages

- **Dynamic web pages/static navigation**
  - Based on known users, data snapshots

- **Personalization of web content**
  - One way communication

- **Web enabling the enterprise**

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Amazon.com

**Today’s Recommendations For You**

Here’s a daily sample of items recommended for you. Click here to see all recommendations.

- **LOOK INSIDE!**
  - *Descriptive Your Strategy: How to Sell It...* by William A. MacKin
  - *The Basic of the Bangin: Sticking Problems...* by Don H. Levin
  - *Competing on Analytics: The New...* by Thomas H. Davenport
  - *The Knowing Own: Non...* by Jeffrey Fryer

**Any Category**

- Advertising
- Anime Rock
- Blues Rock
- Business & Investing
- Chamber Music
- Christianity
- Cognitive Psychology

- Compilations
- Country
- Fiction
- History
- Jazz Fusion
- Leadership
- Literature
- Lyrical & Language
- Long Fiction
- Management
- Marketing
- Math
- New Testament
- Pre-Kindergarten Toys
- Progressive
- Science
- Teen
- Web Marketing

Source: Amazon.com
What you have learned

- The power of separating content from presentation
- Requires strategy that spans from content capture to presentation
- Requires strategy and orchestration of a variety of tools, techniques and methodologies