Reusability 2.0: At the Intersection of Learning and Enterprise Content Management

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Definition

Enterprise Content Management (ECM)

Technologies used to capture content, store, preserve and deliver and documents and content related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.
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“Content” is information and experiences that may provide value for an end-user/audience. Content may be delivered via any medium.
Company Wide
- Company Branding
- Policies
- Standard Operating Procedures (SOP)
- Company website (client facing)

Marketing/Sales
- Product Knowledge
- Competitive Analysis
- Sales Process
- Account Information
- Customer Satisfaction Data

Support/Help Desk
- FAQ boards
- Knowledgebases
- Workarounds
- Troubleshooting Guides

Documentation
- Books
- Manuals
- Workbooks
- Technical Drawings
- Photo Images
- Help
- Tutorials

Training
- Lesson Plans for Classroom Learning
- Student Manuals
- Online Courses
- Competencies

The Enterprise
In what parts of your organization do you already have content management in play?

- Company Website
- Central Knowledge Management System
- Documentation
- Tech Support
- Marketing/Sales
- Line of Business Level
- Training/Learning
- Other (please type any “other” items in the chat window)
Learning/ECM Stages
Where are you?
## Stages of Progression (Training Perspective)

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 0</td>
<td>Content stored on user desktops</td>
</tr>
<tr>
<td>Stage 1</td>
<td>Shared files on mapped (network) drives</td>
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<tr>
<td>Stage 2</td>
<td>Basic document management, check in/check out (i.e. Microsoft SharePoint, Documentum, etc.)</td>
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<tr>
<td>Stage 3</td>
<td>Project-based content repository with workflow (stand-alone LCMS, reusability restricted to training applications)</td>
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<td>Stage 4</td>
<td>Simple linking to external content management repositories, item sharing (i.e. using protocol such as WEBDAV)</td>
</tr>
<tr>
<td>Stage 5</td>
<td>Integrated content and workflow (communities of practice, team room/workgroups, centralized reach to extended content, defined delivery channels)</td>
</tr>
</tbody>
</table>
Case Study #1 -
Case Study – informa

- Information provider for academic, scientific, professional and commercial business community
- 10,000 employees
- 100 offices in 40 countries
- Largest, publically-owned organizer of conferences and courses in the world holding 12,000 events annually
- 2,000 subscription-based information services
- 40,000 academic and business books in print

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Chapman Alliance
# Case Study

## Before

- Content Silos by company (stage 2, mapped drives)
- One-offs, highly customized
- Linear product development
- Non-integrated workflow

## After

- [Image of workflow diagram with nodes: Team Room, Content Management, KM Portals, E-learning courses, Translated Courses, Student Guides, Reference Manuals, Lesson Plans, PowerPoint]

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**Workflow Diagram**

- Team Room
- Content Management
- KM Portals
- E-learning courses
- Translated Courses
- Student Guides
- Reference Manuals
- Lesson Plans
- PowerPoint
Case Study – content & workflow

- Team Room
- Full-time staff and contractors
- Check-in, Check-out
- Tagging Content
- Content Ownership
- Sign-off and Approval
- Subject-Matter Experts Review (markup & feedback)
- Developmental Collaboration
- Level 1-4 Customizations (logo/branding, add content, change out examples, major rewrite)
Case Study – results

• Decrease Development Times
• Single-Source Production Environment
• Eliminate Content Silos
• OnDemand Publishing (auto feed to Docutech)
• Future Proofing Content
• Cut down on Redundancy of Engineering (program tools once, use in many places)
• Reduce costs for creating on-off customizations
• New service offering – customized content for customers
Case Study #2 - Pharmaceutical
Case Study

- Paper-based Tracking: 15%
- Spreadsheet and/or other standard tools: 17%
- Specific tools, with specific HR tasks: 33%
- Learning Management System (LMS): 26%
- Integrated Talent Management System: 9%
Case Study: Pharmaceutical

Chart showing the distribution of costs:

- Paper-based Tracking: 15%
- Spreadsheet and/or other standard tools: 17%
- Specific tools, with specific HR tasks: 33%
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Image of one million US dollars bill.
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- Policies

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- Workarounds
- Troubleshooting Guides

Training
- Lesson Plans for ILT
- Online Courses
- On-the-Job Training
- Assessment
Case Study – results

- Complete regulatory compliance
- Tracking OJT
- Single-source for Standard Operating Procedure development
- Digital sign-off capability
- Focused training
- Compliance Dashboard
Case Study – comment

[Image of a computer interface with a window titled "Webinar"]

- Core Modules - Study Documentation (Web Course)
  - Study Documentation (Container)
  - Objectives (Page)
  - Source File Organization (Page)
  - File System Organization (Page)
  - Source Documentation (Page)
  - Case Report Form (Page)
  - Case Report Form Completion Procedure (Page)
  - Knowledge Point (Page)
  - Guidelines for Good Clinical Practice (Page)
  - Summary (Page)

[Image of a window titled "Version label"]

- Label: R3.2008.0520
- Comment: Updated Procedure with new Form Image

[Logos of RX Pharmaceutical and ChapmanAlliance]
Case Study #3 - High Tech - Software
**Company Branding**
- Policies
- Standard Operating Procedures (SOP)
- Company website (client facing)

**Marketing/Sales**

**Product Knowledge**
- Competitive Analysis
- Sales Process
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**Support/Help Desk**
- Workarounds
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**FAQ boards**

**Knowledgebases**

**LCMS**
- Lesson Plans for Classroom Learning
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**Documentation**
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**The Enterprise**

**Content Management Company Wide**
- Policies
- Standard Operating Procedures (SOP)
- Company website (client facing)
Case Study – results

- Uniformity of all product offerings
- Scalable for different target audiences: sales, partners, customer, and staff
- Content contributors who don’t even know they are content contributors (video, drawings)
- Eliminate redundancy of production and maintenance cycles
- Uniform language translation process
How do we get there?
8-Step Model to ECM Strategy

Step 1: Form a content management strategy task force

Step 2: Inventory existing content resources

Step 3: Map content to critical workflow

Step 4: Determine Output Types and Reusability Options

Step 5: Blueprint your content management strategy as use cases

Step 6: Find the right tool(s) for the job

Step 7: Prototype and Proof of Concept

Step 8: Change Management: Evangelize Modular Design
Choosing the right tool(s) for the job

- **Traditional CMS products** (i.e. Documentum, Vignette, Interwoven, etc.). Where do they fall short for training/learning purposes when used stand-alone?

- **XML Publishing** Tools – designed primarily as desktop publishing tools (i.e. ArborText, Xmetal, etc.)

- **LCMS Technology** - designed specifically for reusability of learning objects for structured and unstructured learning
Observations and Comments

• Integrated content management strategy will likely require multiple technologies, especially organizations that already have ECM in play.

• Advice: Leverage existing content management repositories (if they are working well) rather than proposing a one-size-fits-all solution.

• The biggest challenge will be handling change management in areas such as new workflow, tagging, taxonomies, governance, etc. Technology is an enabler, but is NOT the whole key to leveraging ECM.
Questions???