MadCap Flare and the Globally Distributed Team

PRESENTED BY:
Barb Einarsen, Founder | Clarity Writing Systems
BEFORE WE GET STARTED...

The webinar will be recorded and emailed to all registrants

Use the Question Panel in GoToWebinar to ask questions throughout the webinar
Agenda

- Introduction
- Opportunities
- Challenges
- Case study = what we did
Who

Barbara Einarsen
~ lead people, own projects, and manage change with clarity ~
What

- Writers distributed globally
- Report centrally
- Acquisition or organic growth
- Internal, contract, or outsourced
Where

**Verint** *(Nasdaq: VRNT)*, a global leader in Actionable Intelligence solutions.

**Customer Engagement Solutions (CES) develops Workforce Optimization and Customer Analytics solutions.**

**Within CES, Content Champions is the content development team.**
Agenda

✓ Introduction

☐ Opportunities

☐ Challenges

☐ Case study = what we did
Opportunities

Going global is mostly positive

• Wider variety of skills
• Wider variety of experience
• Support local teams
• Provide different perspectives
Agenda

✓ Introduction

✓ Opportunities

☐ Challenges

☐ Case study = what we did
Time zones
• Culture

Office hours, holidays, vacation
Culture

• Too early, why do they leave work in the afternoon?
• Too late, why is it so difficult to join a call from home?

Office hours, holidays, and vacation can vary wildly across the globe.
Culture

Lots of things influence culture:

- physical location
- company (each acquisition brings its own)
- direct/indirect; polite/rude
- chain of command/every voice counts
Culture

• Ideally, over time, you want to form your own small, cross-border culture based on your values.

Helpfulness, continuous improvement, friendliness, and fun
Silos create barriers and lead to distrust

- Writers in main offices naturally align (somewhat)
- Small groups in offices tend to follow their product managers and teams
- Remote writers come with their own way of doing things
Agenda

✓ Introduction

✓ Opportunities

✓ Challenges

☐ Case study = what we did
• Leadership

“Where there is no vision, there is no hope.”

George Washington Carver
Global leadership team

• First alignment is critical

• Create a vision of the future, the Content Strategy Roadmap
Content Strategy Roadmap

• Common voice
• Baseline: got everyone using the same version and templates for FrameMaker and WebWorks.
• Identified issues (need centralized work space, agile authoring and publishing, better quality checks, etc.)
Initiative Teams

• Started the journey to a Common Voice:
  – Writing Quality Team
  – Acrolinx Team
  – Flare Core Team
Initiative Teams

• Writing Quality goals:
  – High quality, consistent content with a single Verint Voice
  – Easy to find and use topics

• Acrolinx goals:
  – Easy for translators and English as a Second Language
  – Proven improvement
Initiative Teams

• Writing Quality deliverables:
  – Style guide (MMoS #4)
  – Topic based writing (training and guide)
  – Checklists

• Acrolinx deliverables:
  – Automated editing tool implementation
  – Guide and reports
Initiative Teams

- Flare core team goals:
  - Implement a system that satisfies our requirements
  - Provide migration path and infrastructure (CSS, page layouts, sample topics, TOCs, Targets, etc.)
  - Get it done across the globe in a single release cycle
Flare core team

• MadCap Flare implementation
• Microsoft Team Foundation Server implementation

Flare + TFS = Light Content Management System
• Step back

How did we get there?
MadCap Flare

• We did not just pick MadCap Flare

• Over a year of investigation into many content management systems, xml editors, DITA, and other tools

• Flare is different than the rest of what is out there: light, writer-supportive, and powerful
Good, but you know what would be better?

- A light content management system
- Finally had a centralized source control
- Provided global access to content
Selling the Vision

• Money aside, you need support to make changes

• Start with your peers

• Build a base that can see the problems and agree with your vision for a solution

• Present ideas to upper management and the executive team
Know your audience

• Your need is invisible
• Sell what you could be doing

• Describe the problem from their perspective
• Use their lingo; consider environment

• Keep the end in mind
In our case

- Significant rebranding and growing market
  - Investment = more yes

- Content can be a sales tool and a market differentiator
  - Investment = tied to quality improvements

- Current system unsustainable with development move to agile
  - Investment = sustainability
Add visuals
Sold – now get the writers onboard

~ 20 writers globally
All with Framemaker expertise

~ 4 who used Flare or something similar before

Guess what … lots of people don’t like change
Become a change agent

• If you think you are over communicating, do a little more

• Know your audience, sell down the chain just like you sold up

• Flare core team leads the way
Get expert help

- We used Scott DeLoach from MadSkills
  - Migration instructions and Master Project

- Flare core team
  - Flare Getting Started guide

- OnTarget Consulting
  - Basic Flare training based on our environment
Everyone on board

Writers migrate their own deliverables

• Use Flare Getting Started guide
• Flare core team for help and troubleshooting
• Migration all the way through to publishing
More on formal learning

• OnTarget for MadCap Flare training

• Morning sessions for Europe, afternoon sessions for North America

• Walked through our master project and sample projects

• Generated our PDFs and Help
Informal learning

• *Flare Getting Started* guide and master project
• Regularly scheduled communications
• OneNote feature requests and feedback
• Team message board
• 1-on-1 coaching sessions between the Flare core team and writing team
Achievement

• Over 175 core deliverables to migrate from Framemaker to Flare
• Goal: Content migrated and ready for authoring in Flare for next release
Manage through

• It isn’t over until it is over
• Don’t stop communicating when you get buy-in
• Keep the Flare Getting Started guide up to date as you grow
• Follow the project through to completion; from migration to authoring
Flare Getting Started guide

Version 15.2
Document Revision 1.20
Feedback

Writers love MadCap Flare

• Separate TOCs for different brands and output (HTML5 help and PDFs)
• Every deliverable has a target
• Quick and easy to generate targets – and it get consistent results
In progress

- Branching and merging in TFS
- Automated publishing to SharePoint
- Automated testing (help) in Artifactory
- Online library – all topics, whether PDF or help generated in the same version specific library for cross-content search
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Questions? Tips? Stories to share?
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SESSION AND SPEAKER DETAILS AVAILABLE EARLY OCTOBER

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Thank you!