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
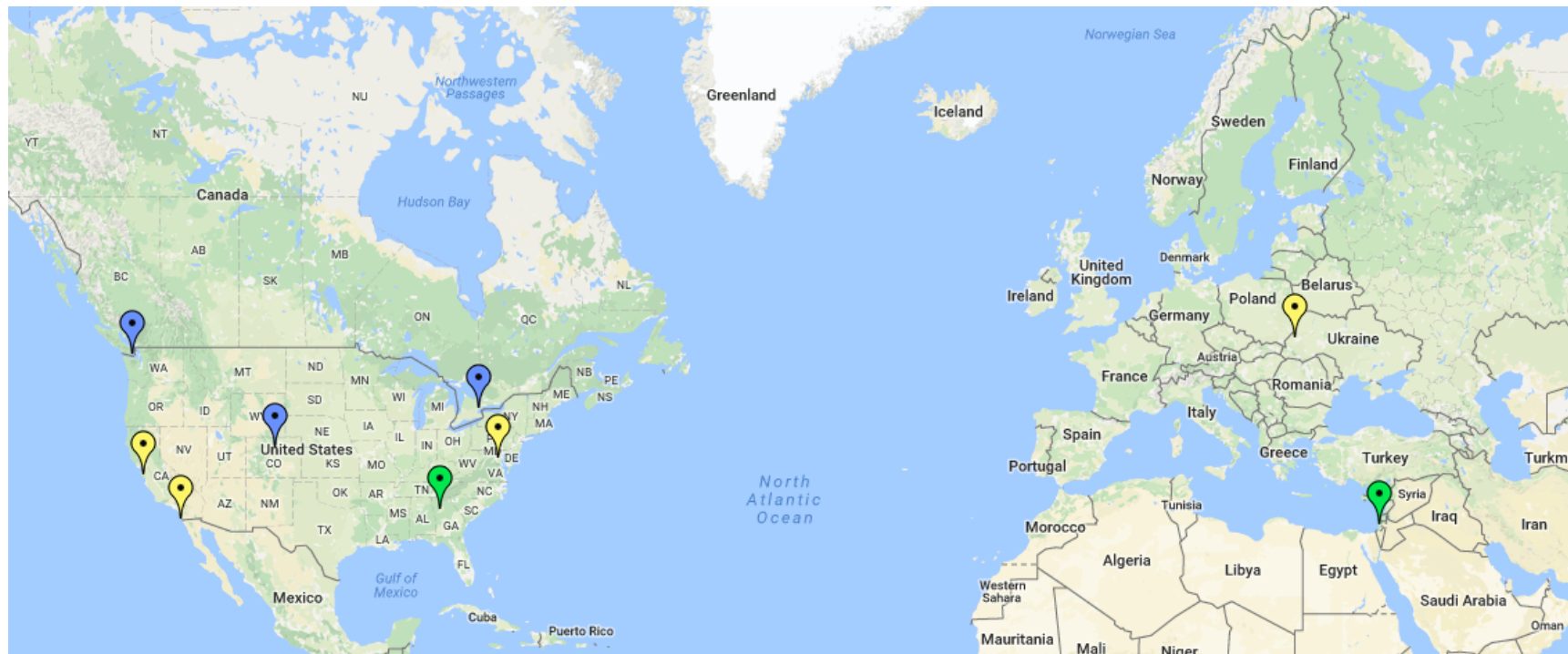- Internal, contract, or outsourced

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.*

Content Champions

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Opportunities

Going global is mostly positive

- Wider variety of skills
- Wider variety of experience
- Support local teams
- Provide different perspectives

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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

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

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- 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

Global teams break down barriers, increase trust, and provide leadership opportunities

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
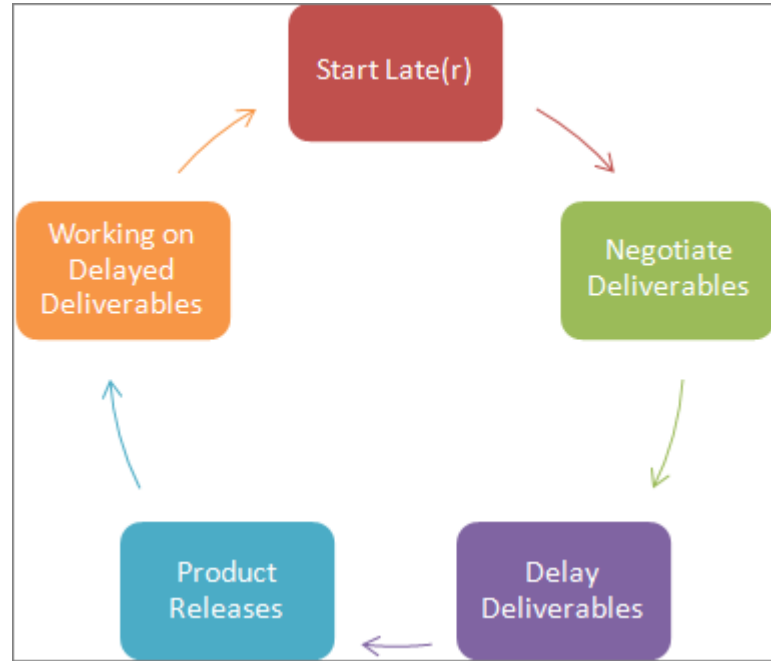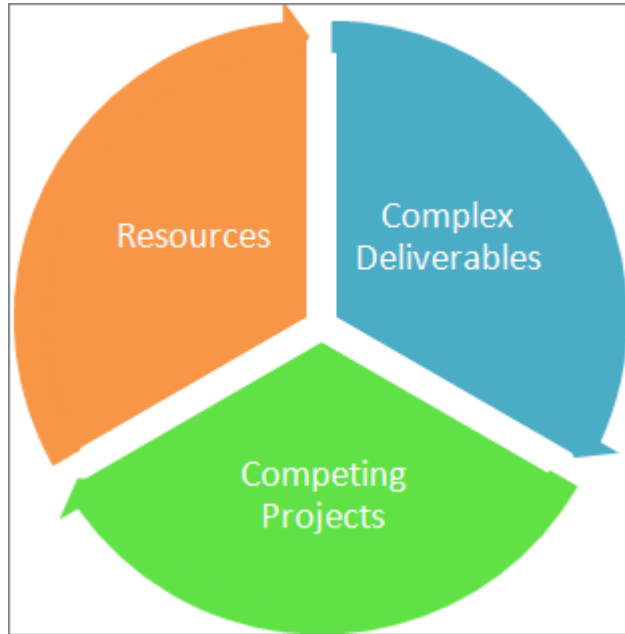- Use their lingo; consider environment

- Keep the end in mind

Sometimes this takes longer than expected – even if it seems obvious

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

Left diagram: Resources, Complex Deliverables, Competing Projects

Right diagram: Start Late(r) → Negotiate Deliverables → Delay Deliverables → Product Releases → Working on Delayed Deliverables → (cycle)

Sold – now get the writers onboard

Guess what … lots of people don't like change

~ 20 writers globally

All with Framemaker expertise

~ 4 who used Flare or something similar before

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
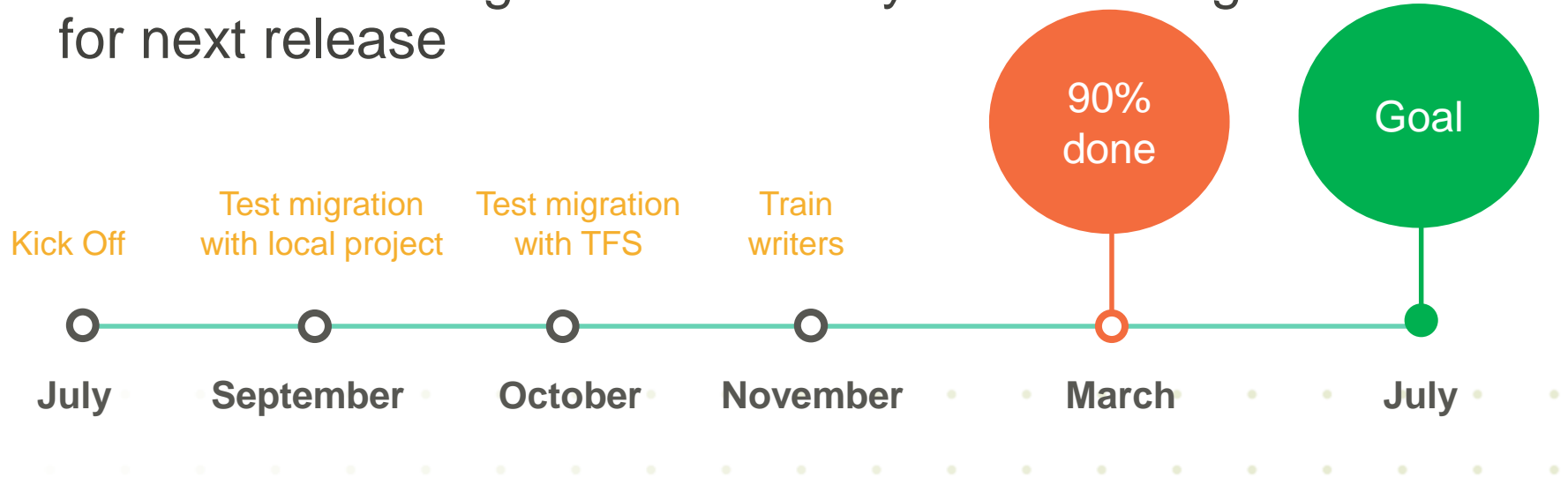
- Generated our PDFs and Help

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

90%
done

Goal

Kick Off

Test migration
with local project

Test migration
with TFS

Train
writers

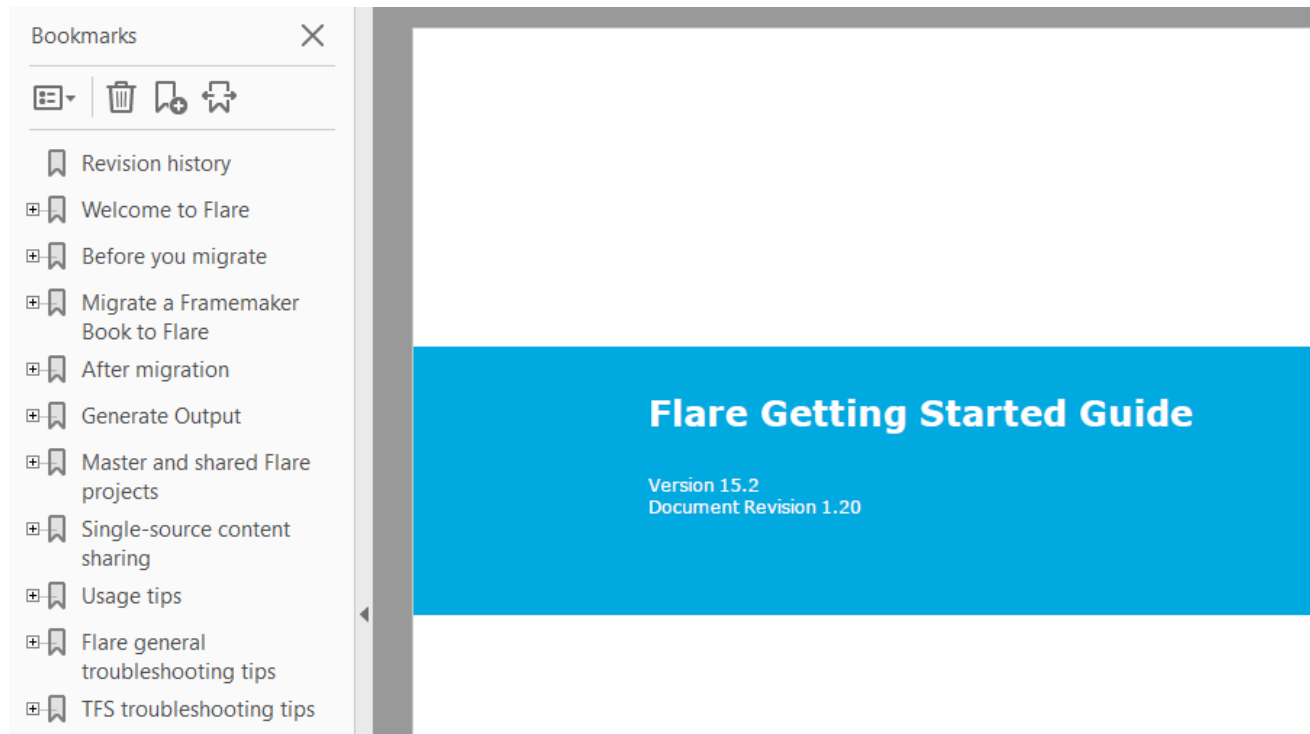**July**   **September**   **October**   **November**   **March**   **July**

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

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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Thank you!

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