

Horror of modernizing content

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Janet Zarecor - Director, Curriculum Development Clinical Systems Education, Mayo Clinic

Janet trained her first computer application in 2000 in Los Angeles, CA and has worked in the training space ever since. In 2010 she started working as Epic trainer at NYU. She was then promoted to PT and then took over leadership of the team in 2013. She turnkeyed her knowledge in eLearning and video creation to her team and made them efficient and talented, creators, producers, and VO artists. In addition, she oversaw the planning and building of state-of-the-art training spaces all over the New York for both ambulatory and inpatient implementations in the five boroughs and Long Island.

Janet was thrilled to begin a new chapter at the Mayo Clinic, focusing on Instructional Designers, providing upskilling in new systems, software and implementing a content management system to revolutionize the way curriculum is created, maintained, and delivered. Janet loves to focus on staff professional development and growth based on the changing landscape, individual passions, and innovative solutions. Janet spends spare time building puppets, creating artistic mayhem, gardening, playing with cats & dogs and walking until her legs fall off.



Scan me!

Alan Pringle, COO, Scriptorium

- ❑ Experienced content strategist—with Scriptorium since 1997
- ❑ Develops content strategy: interviews stakeholders, scopes out pain points, develops recommendations
- ❑ Improves content operations: how organizations create, manage, and distribute content
- ❑ Background: English and journalism
- ❑ Deeply appreciates good doughnuts, pastries, and baked goods



Scan me!



Why are we here?



What this presentation is not...

We are not here to tell you what tool to use!



Why are you here?

We are here to give you an actionable list of steps for finding the right tools, futureproofing your organization's content and avoiding the wolves!

In this session, we will cover the following steps you can begin working on today:

- ❑ Support, visibility and communication
- ❑ Discovery and requirements gathering
- ❑ Lifecycle, governance and standardization
- ❑ Content both front of mind and forgotten
- ❑ Delivery outputs for now, the future and beyond

Executive support, visibility and communication



Executive support and visibility

Requiring your leadership's support for success isn't just your clairvoyance. Prosci research from 1998 to 2023 has ranked Executive Sponsorship as the number one contributor to project success in organizations.*

Executive sponsors' most critical activities:

1. Active and visible participation through the project
 - a. Support the team
 - b. Champion the Change
2. Communicate support and promote the change to impacted groups
3. Build a coalition of sponsorship

**Best Practices in Change Management Excerpt. E13-14, E53 Prosci, 2023*



Communication

Create the most effective paths or communication to build awareness, get buy in and acceptance of staff.

Who do impacted staff want to hear from? *Preferred senders of organizational and personal messages per Prosci research:

- ❑ Organizational Messages - CEO/President
- ❑ Personal Messages - the employee's supervisor

**Best Practices in Change Management Excerpt. E24 Prosci, 2023*



Communication

What are the most important messages to send to impacted staff?

- ❑ Business reasons for the change
- ❑ Why the employees should want to participate
- ❑ Impact of the change on employees
- ❑ How the change is happening
- ❑ Details of the change

**Best Practices in Change Management Excerpt. E24 Prosci, 2023*



The image features four silhouetted figures of men in work clothes and hats, standing against a bright, hazy background. Each figure holds a different tool: the first on the left holds an axe, the second holds a hammer, the third holds a pickaxe, and the fourth on the right holds a pitchfork. The text 'Discovery and requirements gathering' is overlaid in the center in a bold, black, sans-serif font.

Discovery and requirements gathering

Photo: Robert Couse-Baker, PxHere

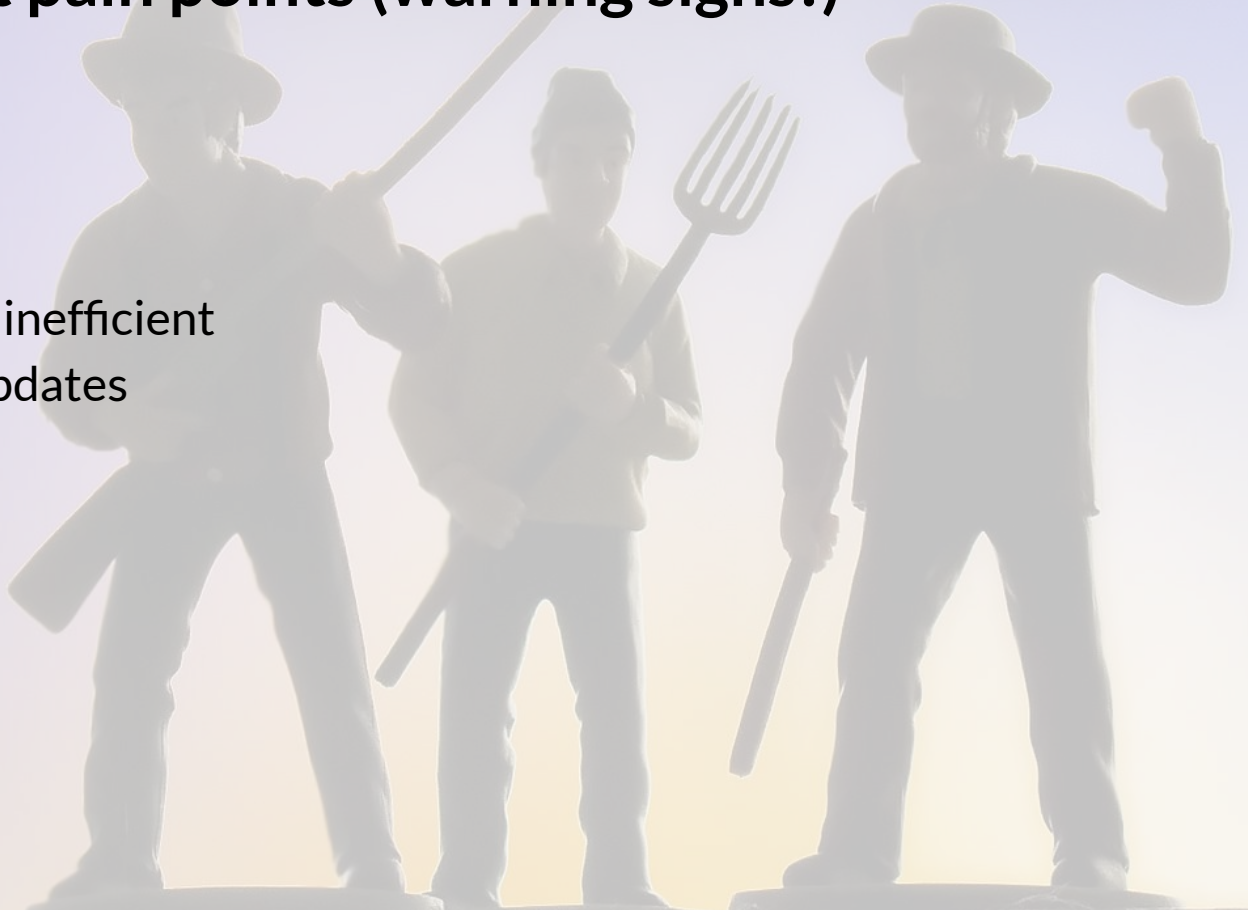
Discovery and requirements gathering

The background features four stylized, semi-transparent figures of men in work clothes and hats, each holding a different tool. From left to right: the first figure holds an axe, the second holds a pickaxe, the third holds a shovel, and the fourth holds a pitchfork. The figures are set against a light blue and yellow gradient background.

- Current state analysis
- Gap analysis
- Needs analysis
- Recommendations for updated content operations

Common content pain points (warning signs!)

- Copy and paste
- No reuse strategy
- Manual formatting
- Translating content inefficient
- Merger/branding updates



Consider a consultant—your “content therapist”

- ❑ Has heard similar stories about pain points
- ❑ Calculates and explains return on investment
- ❑ Combine your domain knowledge with the consultant’s expertise
- ❑ Provides third-party POV—and “therapy”





**What about AI?
Can't it shortcut a lot of
this discovery?**

What about AI? Can't it shortcut a lot of this discovery?

HIGHLY UNLIKELY.

- ❑ “Can we train a large language model on our body of content?” Yes, BUT...
 - ❑ Keep copyright, intellectual property, and regulatory restrictions in mind.
 - ❑ Feeding your content to public LLMs problematic.
- ❑ Don't expect it to magically create correct content—or fix crappy content.
- ❑ Possible AI uses for content:
 - ❑ Reuse
 - ❑ Small, discrete tasks such as summarizing a page or topic
 - ❑ Adherence to style guidelines and reading levels
- ❑ AI is just another tool for authors. Not a replacement for them!

Lifecycle, governance and standardization



Lifecycle

Content lifecycle refers to the managing of your organization's content from creation to publishing to archiving and having a process at every stage. This can look different based on your organization but basically contains the same life stages:

- Request
- Creation
- QA Review
- Approval
- Publication
- Dissemination
- Measuring
- Maintaining
- Archiving/deletion



Lifecycle - Simplistic Example



Request Review & Prioritization

Prioritization driven by stakeholder request urgency



Development & Collaboration

ID develops first draft
Collaborate with requestor for completeness



Review & Approval

Review by analyst and informaticist.
Once they approve, moves to practice SME for final approval



Publication & Communication

Published to X channel(s)
Communicated to Y stakeholders via email and on standing meetings



Review & Refresh

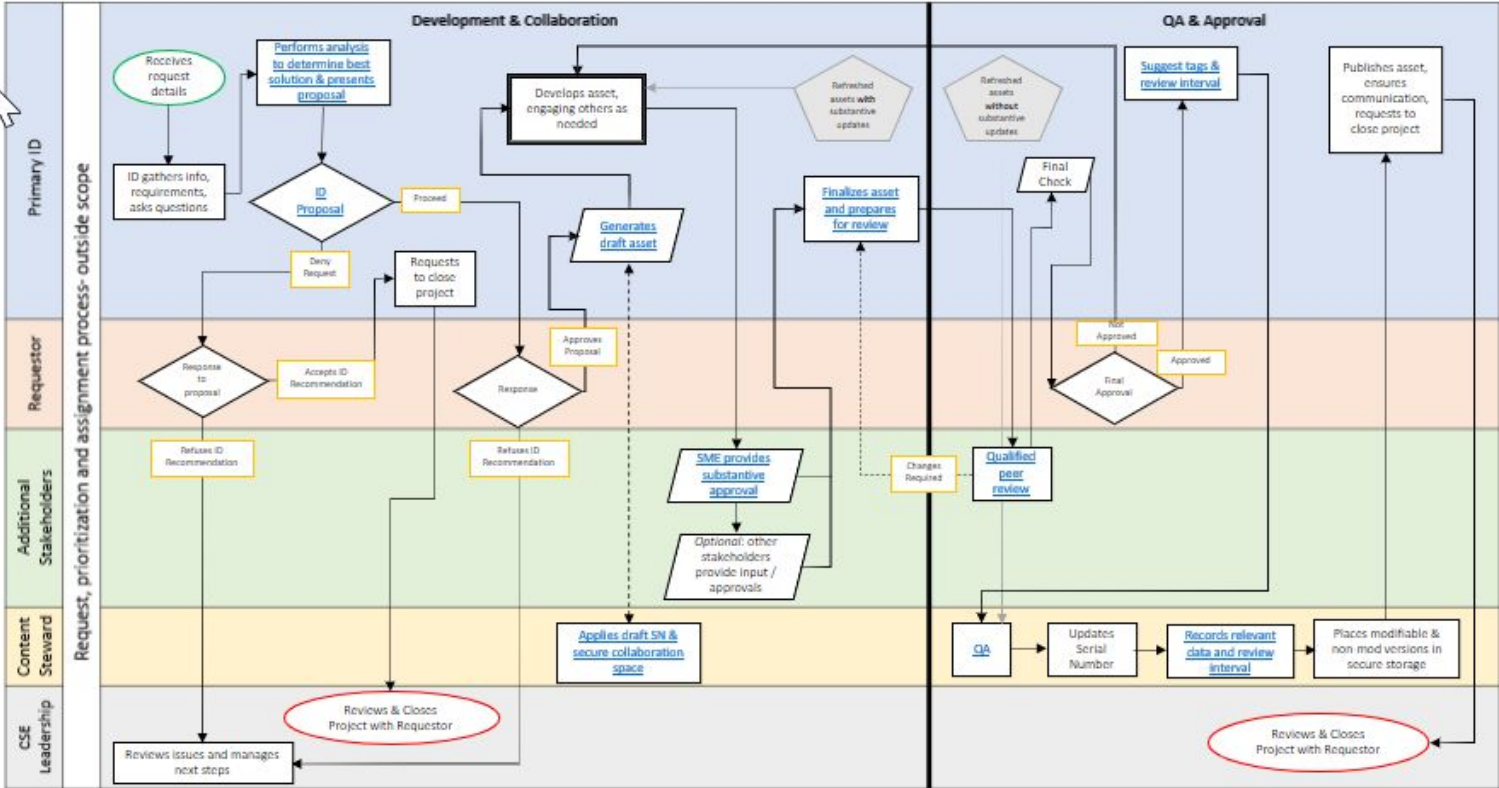
Review performed with every upgrade by ID & trainers
Refreshed with approval by analyst only



Archive

Removed from distribution after approval from practice and informatics

Lifecycle - Realistic Example



Governance

- ❑ Does for content what a data governance plan does for data
- ❑ Written, accessible, modifiable
- ❑ Explains the standards and processes that guide content
 - ❑ Prioritization
 - ❑ Development and approval
 - ❑ Lifecycle management
 - ❑ Organization and storage
 - ❑ Distribution mechanisms/channels
 - ❑ Measures of success
- ❑ Explains who is responsible for each step

**Expert tip: Use the lifecycle to inform this documentation!



What needs standardization?

Examples of what to standardize:

- Look and feel
- Naming convention
- Language and writing style
- Inclusion and accessibility
- Serialization & organization
- Content lifecycle (no side doors!)



Impact of standardization

Benefits include:

- ❑ Strengthening your voice and brand
- ❑ Consistent user experience
- ❑ Improved user search results
- ❑ At-a-glance information via serialization
- ❑ Asset organization
- ❑ Improved accuracy and quality
- ❑ Smoother end to end delivery for your stakeholders



Content both front of mind and forgotten



Did you overlook any content?

- ❑ Frustration over one content type can give you tunnel vision
- ❑ Not everything has to go into the new process, especially outdated content
- ❑ Garbage In, Garbage Out (GIGO): sometimes, it's better to start over



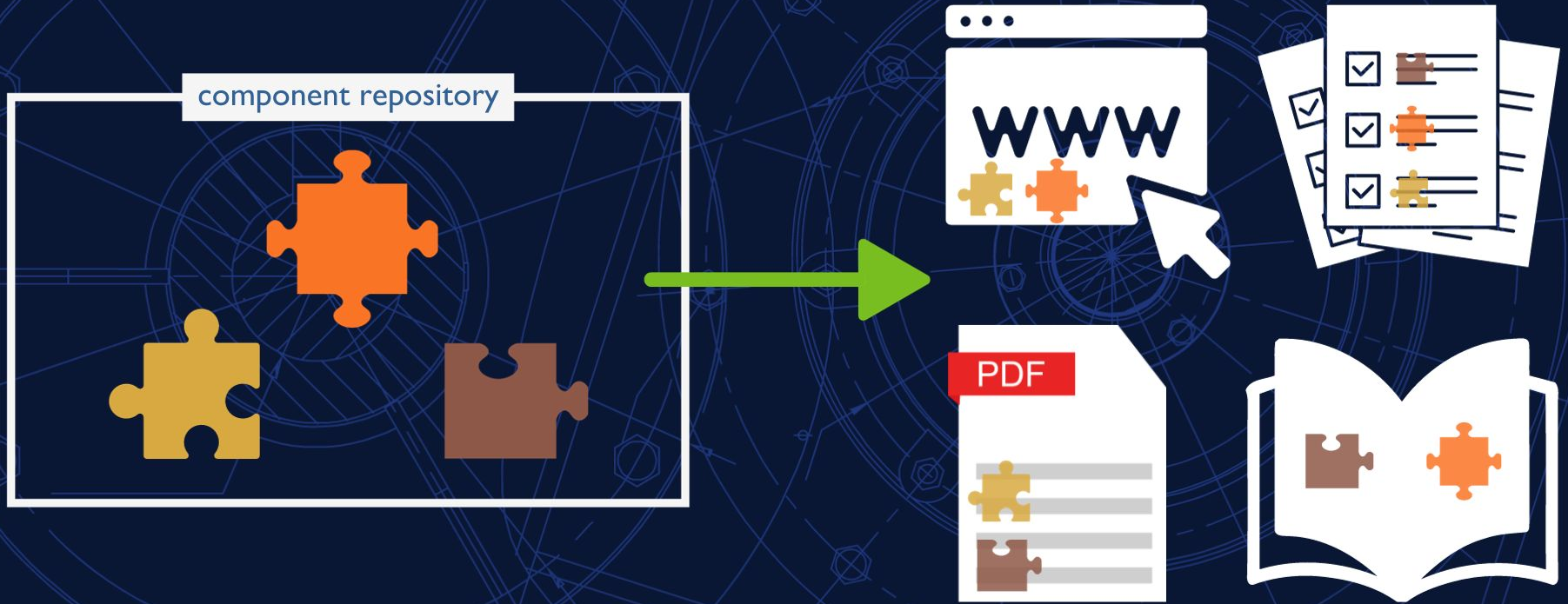
Single source of truth for everything*

- ❑ Different content types should come from a single set of source content
- ❑ Avoid maintaining separate source files for different delivery formats
- ❑ Single source of content may not apply to some content, such as audio and video files (stored in DAM instead)
- ❑ Scripts, captioning and other text-based elements could rely on the single source of truth

**almost everything!*



Transforming source components into delivery targets





Delivery outputs for now,
the future and beyond

Photo staging: Emmy Cuellar

Delivery

The background of the slide is a photograph of a terrarium. It features several large, realistic-looking insects, including a prominent spider in the lower right and a large beetle in the upper right. The terrarium is filled with green moss and small plants, creating a naturalistic environment. The entire image is overlaid with a semi-transparent green filter.

- What delivery end points do you have now?
- Are they addressing needs of content consumers?
- Meeting business needs?
- Balance focus between current and future requirements

What about the future?

- ❑ Can new systems handle delivery formats you don't know about?
- ❑ Be wary of tools that constrain you to just certain delivery types
- ❑ Separation of content and formatting ensures a high degree of flexibility
- ❑ Futureproofing: implement systems that are nimble and adaptable



The horror is nearly over!

Things you need before you pick tools



- ❑ Support and visibility from executive sponsor
- ❑ Support and visibility from authors' direct supervisor
- ❑ Strong communication channels
- ❑ Requirements gathering from your customers and staff
- ❑ A full understanding of content lifecycle—current and desired future
- ❑ Governance and approval frameworks
- ❑ A formalized universally used style guide
- ❑ Documented standardization principles: serialization, naming conventions, etc.
- ❑ What content are you forgetting: videos, slide decks, spreadsheets? It all needs a home!
- ❑ Desired delivery outputs in mind (and ability to deliver to new targets in the future)



Questions?



Thank you!