

LavaCon 2024

The Content Strategy Conference lavacon.org

Horror of modernizing content



Janet Zarecor, Mayo Clinic
Alan Pringle, Scriptorium



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

- ❑ Has worked in adult software and systems education as an instructor, instructional designer and manager of staff since 2000
- ❑ Started in healthcare software and systems education in 2010
- ❑ Specialized in upskilling and nurturing staff in the areas of eLearning and modernizing content management as well as professional and career development
- ❑ 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
- ❑ Joined Mayo clinic in 2021 as Director of Curriculum Development for Clinical Systems Education
- ❑ Also enjoys making puppets and puppet videos, walking for miles, growing and cooking just about anything and all the furry friends



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 men dressed in hats and work clothes, standing against a bright, hazy sunset background. Each man is holding a different tool: an axe, a pickaxe, a shovel, and a pitchfork. The scene is backlit by the sun, creating a silhouette effect and a warm, golden glow. The text 'Discovery and requirements gathering' is superimposed in the center in a bold, black, sans-serif font.

Discovery and requirements gathering

Photo: Robert Couse-Baker, PxHere

Discovery and requirements gathering

Four stylized, grey, 3D-like figures are positioned across the background. From left to right: the first figure holds a large axe over its shoulder; the second figure holds a pickaxe; the third figure holds a shovel; and the fourth figure holds a pitchfork. They are all wearing hats and work clothes, standing against a light blue and yellow gradient background.

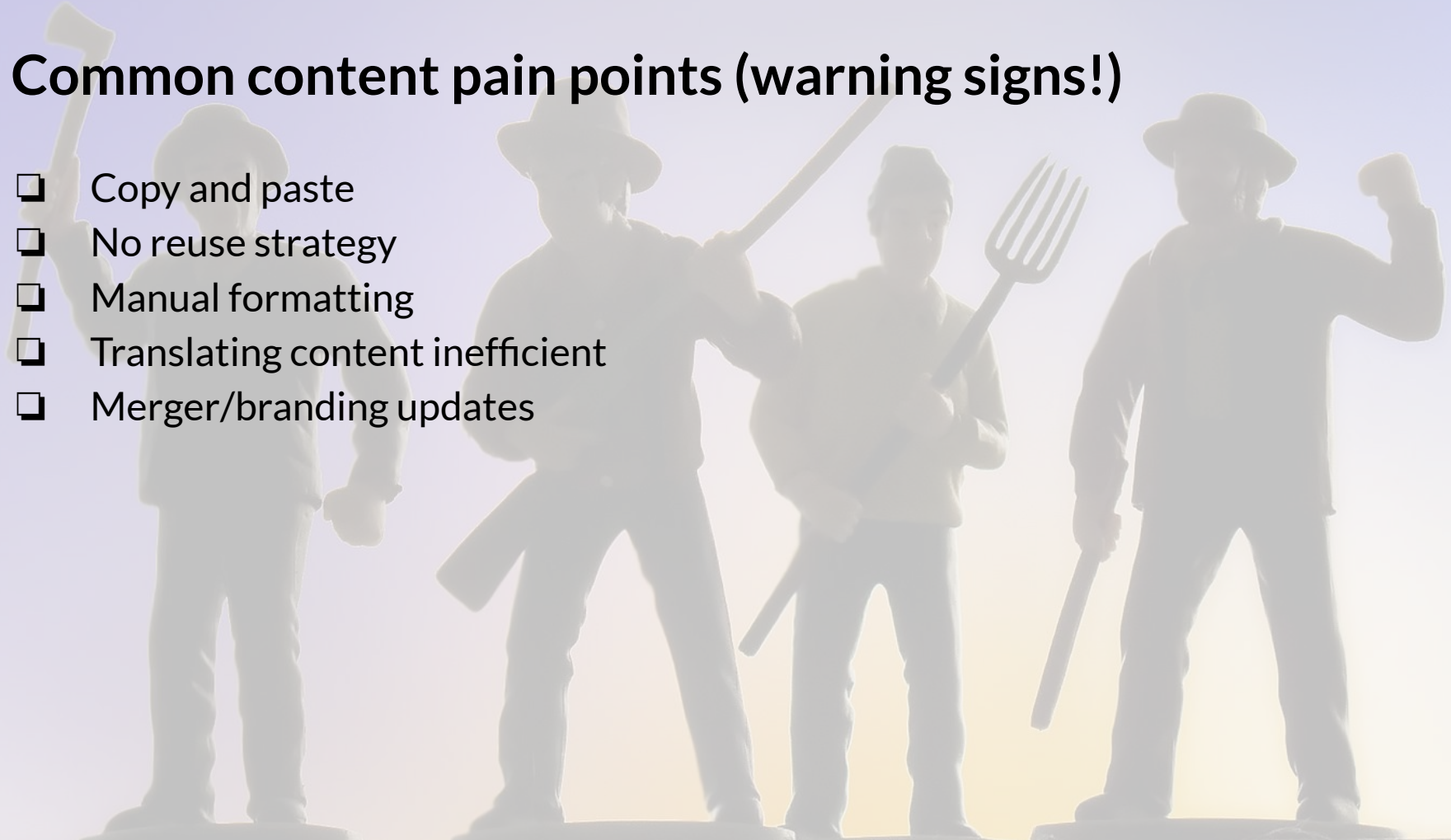
- ❑ Current state analysis
- ❑ Gap analysis
- ❑ Needs analysis
- ❑ Recommendations for updated content operations

What are your content pain points?

@#&*!

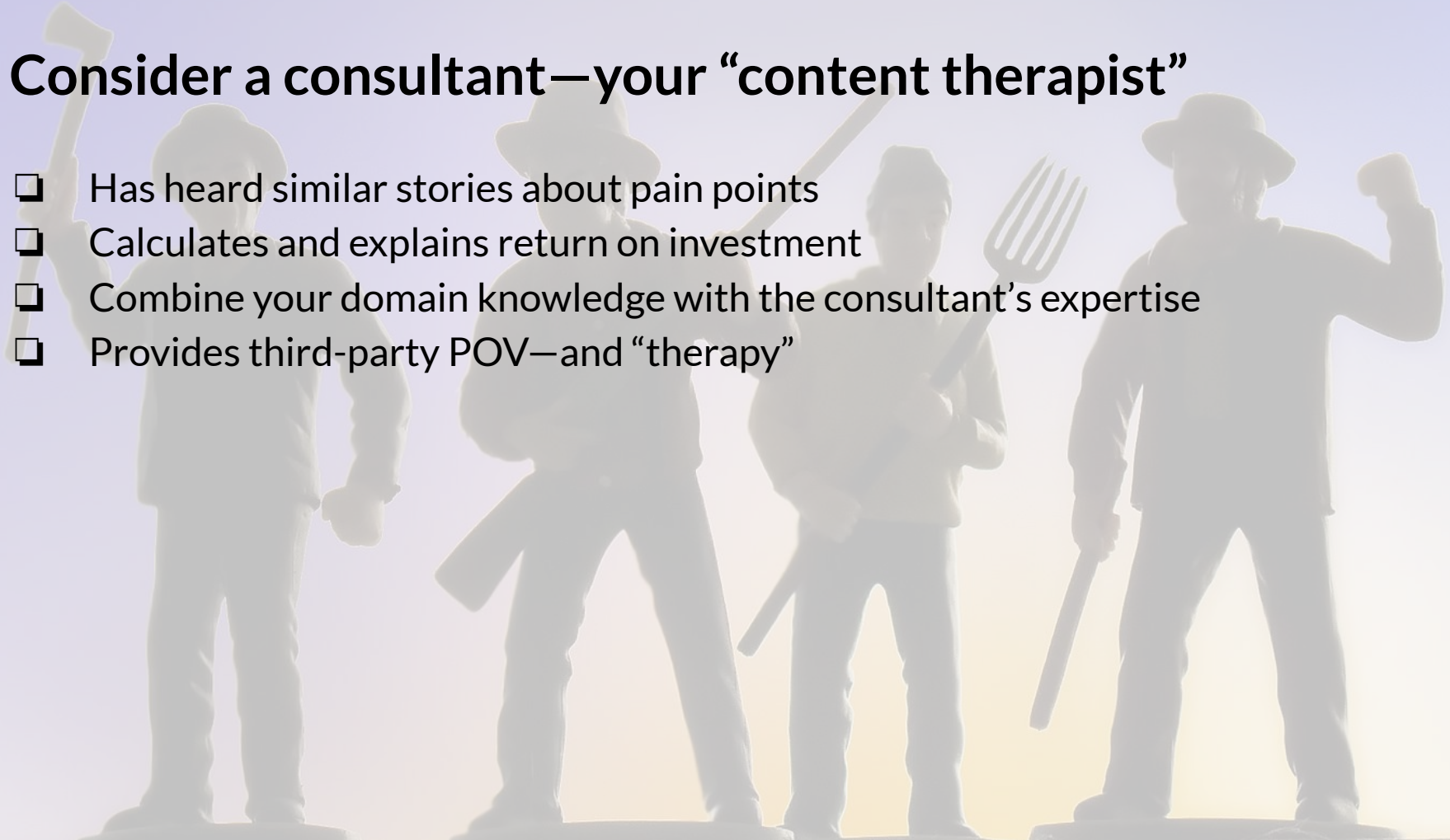
Common content pain points (warning signs!)

- ❑ 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?**

Nope!

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

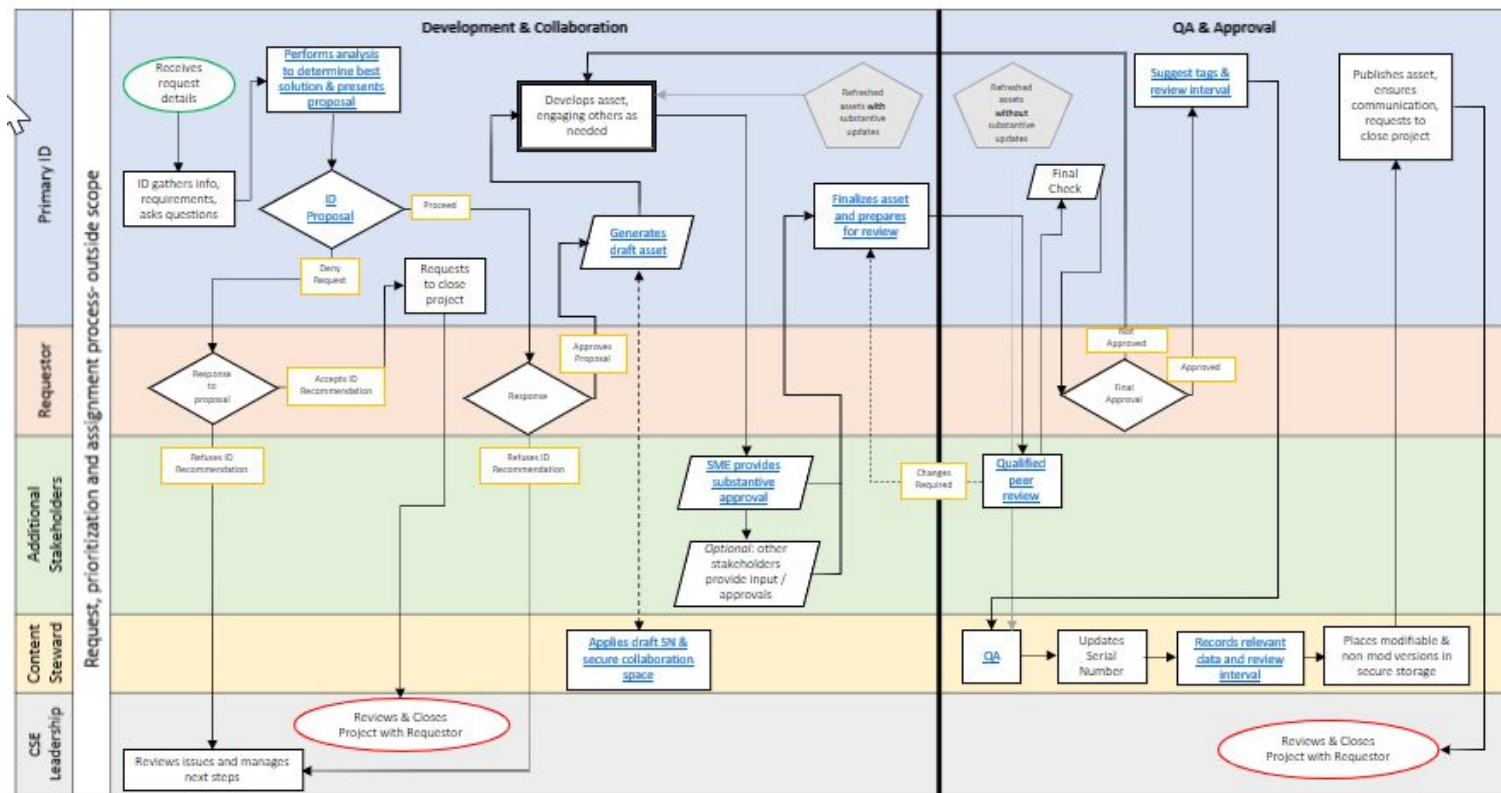
Review performed with every upgrade by ID & trainers
Refreshed with approval by analyst only



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



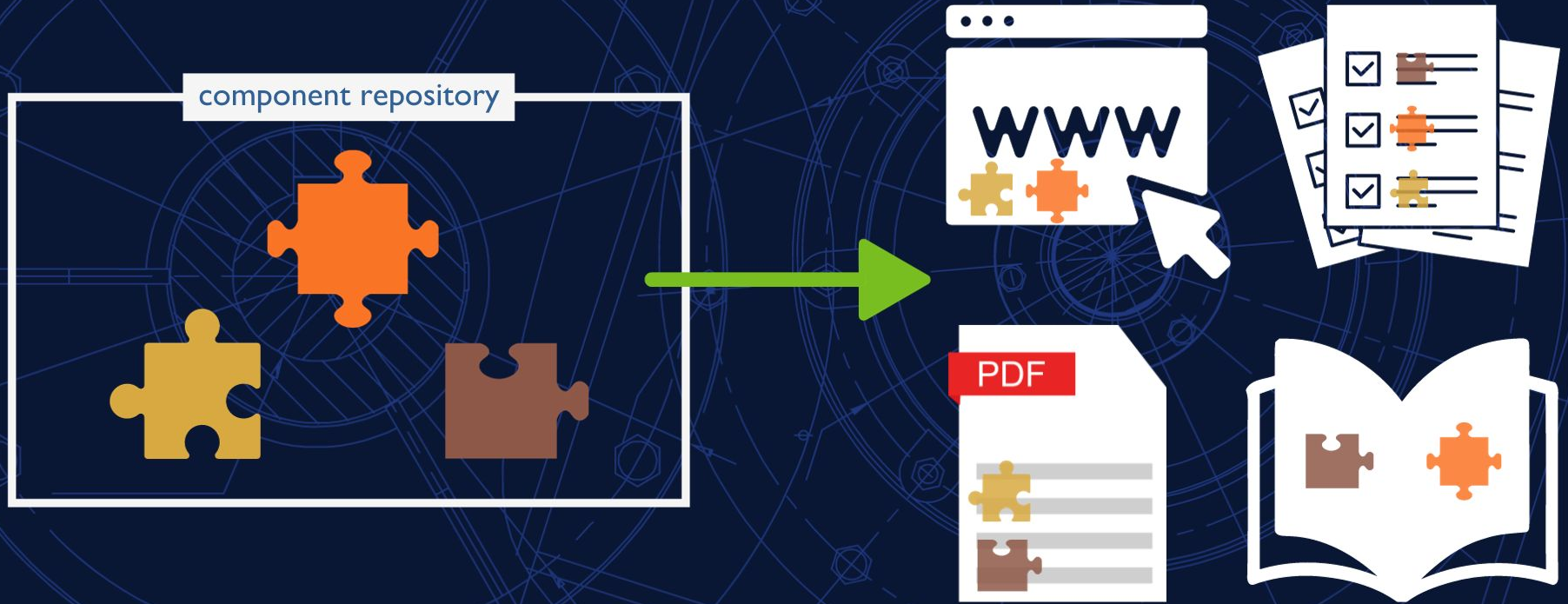
Single source of truth for everything*

- ❑ 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



A close-up photograph of a terrarium or diorama. The scene is filled with green moss and small green plants. Several white plastic insects are scattered throughout: a large crab-like insect on the left, a smaller insect in the upper center, a large spider-like insect on the right, and a dark, blurry insect in the foreground. A green plastic structure is visible in the bottom left corner.

Delivery outputs for now,
the future and beyond

Photo staging: Emmy Cuellar

Delivery

- ❑ What delivery end points do you have now?
- ❑ Are they addressing needs of content consumers?
- ❑ Meeting business needs?

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

Four action figures of the Simpson family are posed against a starry space background. Homer Simpson, on the left, is in a dynamic pose with one leg raised, wearing his signature yellow shirt and blue pants. Marge Simpson stands next to him in a blue dress. Bart Simpson, in the center, wears an orange shirt and khaki pants. Lisa Simpson, on the right, is dressed in a pink turtleneck and black pants. Each figure stands on a small, light blue circular base. The text "The horror is nearly over!" is superimposed across the middle of the image in a white, outlined font.

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)

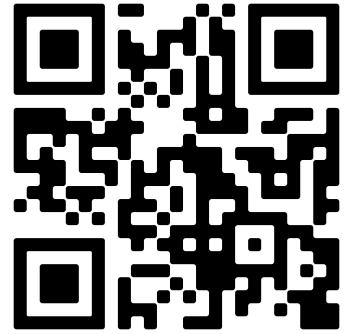


Questions?



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Thank you!

