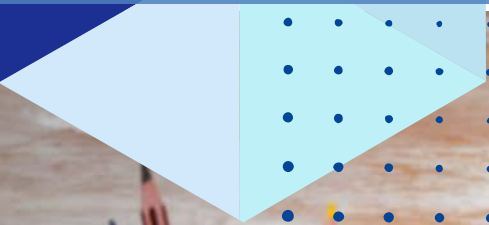


A Guide to CCMS Implementation Success



Common CCMS Success Factors

The promise of eliminating manual and redundant processes, significantly reducing translation costs, and dramatically shortening production cycles, has many documentation teams eager to adopt a component content management system (CCMS.) What teams often fail to realize is that the promise isn't achieved by selecting the perfect CCMS, but more importantly by ensuring the system selected is successfully implemented and adopted.

Too often CCMS projects get derailed because the team doesn't anticipate or plan for all that's needed. Containing insights from hundreds of successful CCMS implementation projects, this brief guide helps you understand what's most commonly needed so you can more confidently implement a new CCMS or get your current project back on track.



After years of implementation, we've found the CCMS projects that most often succeed share these common characteristics:

- Avoid common pitfalls
- Have a holistic plan
- Properly resource the team
- Define clear detailed requirements
- Test the solution
- Map a path to success
- Take a phased approach
- Start with a Pilot
- Provide practical training
- Enable future opportunities

Looking at each of these areas in more detail can give you the insights you need to succeed.



The path to future success is often built upon a clear understanding of past failures.

Take the time to ask others within your organization who've implemented similar solutions, or industry experts and peers outside your organization who have done the same. Investing a few resources to learn more upfront can help you avoid spending significant resources later to rework or recover your project from common pitfalls.

Avoid Common Pitfalls

Before you start on your journey to build or improve your content management solution, it can be helpful to learn from the mistakes and success of others. The most common pitfalls often involve aspects of the business environment into which the new solution is being introduced.

Lack of management support – without strong management support you may find yourself continually fighting for resources or trying to overcome competing priorities. A strong executive sponsor can remove barriers to your success and secure needed resources.

Resistance to change – it's natural to assume change will be difficult or have a negative impact. To avoid resistance, it's important to help key stakeholders understand 'what's in it for them' in the value they will receive from the proper implementation of the system.

Myopic views – with teams often working in silos, it's easy to have disparate or competing CMS tools adopted within the same organization. Without thoroughly investigating not only the existing environments but also emerging initiatives across your complete content lifecycle, you could miss an opportunity for synchronization or worse set up a new competing system.

Misaligned skills – in an effort to move quickly or save costs you can be tempted to simply reassign existing staff to new roles in which they have limited knowledge or experience. While in some cases this can work, more often it leads to unexpected errors or oversights that can derail the entire project. To ensure success you must be willing to, if necessary, bring on new hires with experience and skills aligned to your organization's needs.

Setting unrealistic expectations – it's all too easy to hear of the many opportunities a CCMS can bring to your organization and assume you'll realize them all. Realistically within every organization there are some changes that are simply not feasible. Ensure that the objectives you set for your CCMS solution are achievable not in the abstract but within the actual environment, processes and culture into which the solution is being deployed.

Have a Holistic Plan

When planning your CCMS implementation, it's critical to recognize the impact your system will have throughout your organization's ecosystem. Start by taking the time to understand the information flow from creation through consumption in all forms by both internal and external audiences. Gather input from as many stakeholders as possible and provide an easy way to continue to capture feedback.

A holistic plan looks at how the solution fits within each area of the content lifecycle (creation, management, publishing and delivery.) The plan continues by identifying additional aspects that span across the lifecycle such as conversion strategies, translation management and taxonomies. It's also important to recognize that not all the content needed will have the CCMS as the source of truth; be prepared to integrate with other business systems and repositories for a complete content solution.



The corporate environment must be considered in a holistic plan

Plan to address any business, compliance or IT rules and requirements for new tools adoption. Look for competing corporate initiatives and ways to avoid conflict and work collaboratively. Most critically there must be at least some aspect of your CCMS project that will support one or more corporate objectives and future goals.



Assemble the Right Team

There are common components to any successful project team, like having a strong leader (executive sponsor), getting clear and frequent communications from project managers, and having cross-functional team member participation. It's the additional skills critical to supporting a CCMS solution that often go unrecognized or unfulfilled. If these skills gaps are not addressed your project will suffer. Some of the skills may be found within your current staff, but most often it is necessary to add new experienced team members to fulfill the key roles needed.

Key roles for ongoing CCMS project success include:

- **The 'go-to' person** – team members who have direct experience with similar implementations and are willing to provide support and guidance to the rest of the team through the new tools and processes.
- **Application administrator** – configures the system, performs user admin support for the system
- **Information architect** – maintains the content model, information reuse strategy, and user templates
- **Stylesheet developer** – maintains and updates the stylesheet code. Understands the publishing tool, semantic content and structure, and content development best practices for all your target outputs.
- **Conversion specialist** – the responsibilities of this role are based on your approach to content conversion. The specialist will run conversions and clean up when necessary beyond what the authors can do.
- **Trainer** – ensures ongoing adoption and use of the system, by providing in-house training on the new tools and processes specific to your organization's use cases.





Capture Detailed Requirements

Unanticipated needs are often the root cause of delays, rework and dissatisfaction with the CCMS solution. The best way to anticipate all the needs for your project is to start with a thorough requirements gathering session. In addition to input from the technical publications team, content contributors, and IT team, it is helpful to explore all the related areas of content reuse, content data needs and required processes. To fully understand and capture the requirements you should look at it each area from the following perspectives:

- Current system requirements
- Future plans (e.g. new offerings, processes or markets)
- Technology integrations needed
- Upstream and downstream content and data needs (internal and external)
- Need for legacy content

Another helpful resource when compiling your requirements is researching or querying industry and peer groups for common needs.

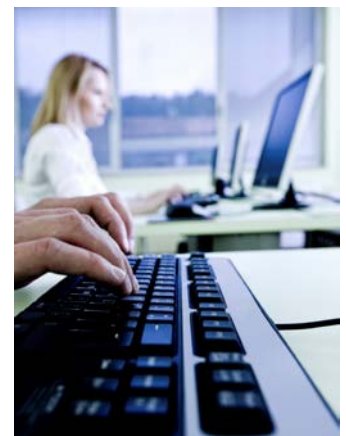
The requirements gathering exercise is a great opportunity to take inventory of what you are doing today and what you may no longer need or want to do in the future. Don't just automate/implement existing processes but take the time to look for better ways to do it.

Test Your Solution

CCMS solutions are not “one size fits all.” There are many choices and many ways in which the tools can be implemented to drive distinctly different experiences. Be clear about what you need/want the system to do independent of any specific tool's functionality. Let your needs drive your selection for the right fit, form and function - then test the solution's ability to meet your needs.

While testing during tools selection is very helpful in understanding the possibilities within each tool, testing your system before launch is 'critical' to ensuring implementation success. It's important to test not only each specific tool's operation, but the core use cases end-to-end to prove the system's true viability. Plan ahead to incorporate early user and performance testing, and make sure you have an easy way to capture feedback on issues, bugs, and enhancements.

Testing the system isn't a nice-to-have step, it could be the difference between success and failure.



Map Your Path to Success

Though your plan may have much in common with those of other teams, you must carefully plot your specific path to success based on the unique nature of your organization. Take into consideration the available resources, corporate priorities, and business environment into which you are introducing the CCMS. While each team's path is different, these key steps can ensure you stay on track.

Define Success – based on the realistic expectations you set for your project, define the measurable success criteria that you will track and ultimately use to prove the value of your implementation. Start by identifying the current value of each measurement, then track changes as you reach key milestones and test your final solution.

Phased Approach Yields Early Results – a complete implementation project can take many months to complete the deployment, however your organization can begin to see value from the changes you are making much sooner. A well-crafted plan is built up of phases showing results in 30, 60 or 90 days. When creating your plan determine the quickest wins and prioritize those activities to build a track record of success. The longer management must wait to see value, the higher likelihood your project will be questioned, delayed or halted all together.

Phases can be as small as one or two workstreams and can be set to overlap and/or run concurrently as part of the overall project implementation. The following workstreams should be considered as you plan and scope your phases:

- Technical publications process planning
- Content analysis and modeling
- System infrastructure
- CCMS configuration
- Stylesheet development for all outputs
- Content conversion strategy
- Systems integrations
- Training
- Pilot deployment
- System refinement
- Production deployment



Oberon Technologies, Inc.

Oberon Technologies provides expert consulting and systems integration services to address your needs across the content lifecycle. Working with hundreds of customers we've developed a proven implementation methodology. With a 100% project success track record, Oberon Technologies can help you ensure your project succeeds.

Oberon's "Vision Assessment and Implementation Roadmap Workshop" will help your organization map a course for success that leverages industry best practices and delivers on the criteria your organization values most.



info@oberontech.com
www.oberontech.com

Start with a Pilot

To minimize impact on the overall organization and build momentum for the adoption of your new CCMS, a best practice approach is to start with a pilot. Your pilot should engage a small cross-functional team focused on the primary business drivers. A well-executed pilot will build change agents/champions of the participants and will give you the opportunity to refine your processes and configurations before moving into full deployment. To take full advantage of the pilot you should have the willingness to refine or change your approach if necessary based on the feedback and experiences of the pilot users.

Prepare the Team for Success

Without user adoption even the most well implemented CCMS can still fail after deployment. When users are unfamiliar with the functionality of the new tools and unclear on the new processes, frustration quickly sets in and user adoption slows. By giving users the opportunity to interact with the system as early as possible and conducting practical training in close proximity to system deployment, you can greatly improve your odds for user adoption and project success. For many users the opportunity to have training also reinforces the company's commitment to the team and the project's success.

Continue the Success

The benefits of a well-executed CCMS implementation can extend far beyond delivering on the promises for the documentation group. A CCMS solution offers new opportunities for teams across your organization to directly or indirectly take advantage of the improvements you've made like easier access to information, faster document production cycles and potentially new information offerings. A successful CCMS implementation doesn't end with deployment, it should be the foundation on which you build future success.