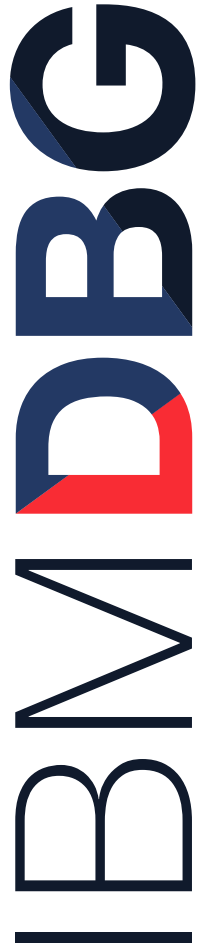


# Updating content types for marketing and omnichannel

Michael Priestley, IBM / *@ditaguy*

February 1, 2019



# Michael Priestley

Michael Priestley is a product owner and content technology strategist, currently leading the IBM Marketing Taxonomy Guild to revise and align taxonomy initiatives across the marketing ecosystem. He has experience working with and across documentation, support, training, and marketing content as an enterprise content technology strategist. He was one of the original architects and editors of the DITA standard, was named an OASIS Distinguished Contributor in 2017, and is currently co-chairing the Lightweight DITA subcommittee.

@ditaguy



# Initiation

## Analytics failure

No common  
type taxonomy

200+ values  
in just one tool

No tool  
integration

## Starting goals

Marketers understand what characteristics of content contribute to success so they can optimize investment

Increase quality

Reduce waste and confusion

Marketers understand what content already exists that meet their criteria so they can reuse or differentiate

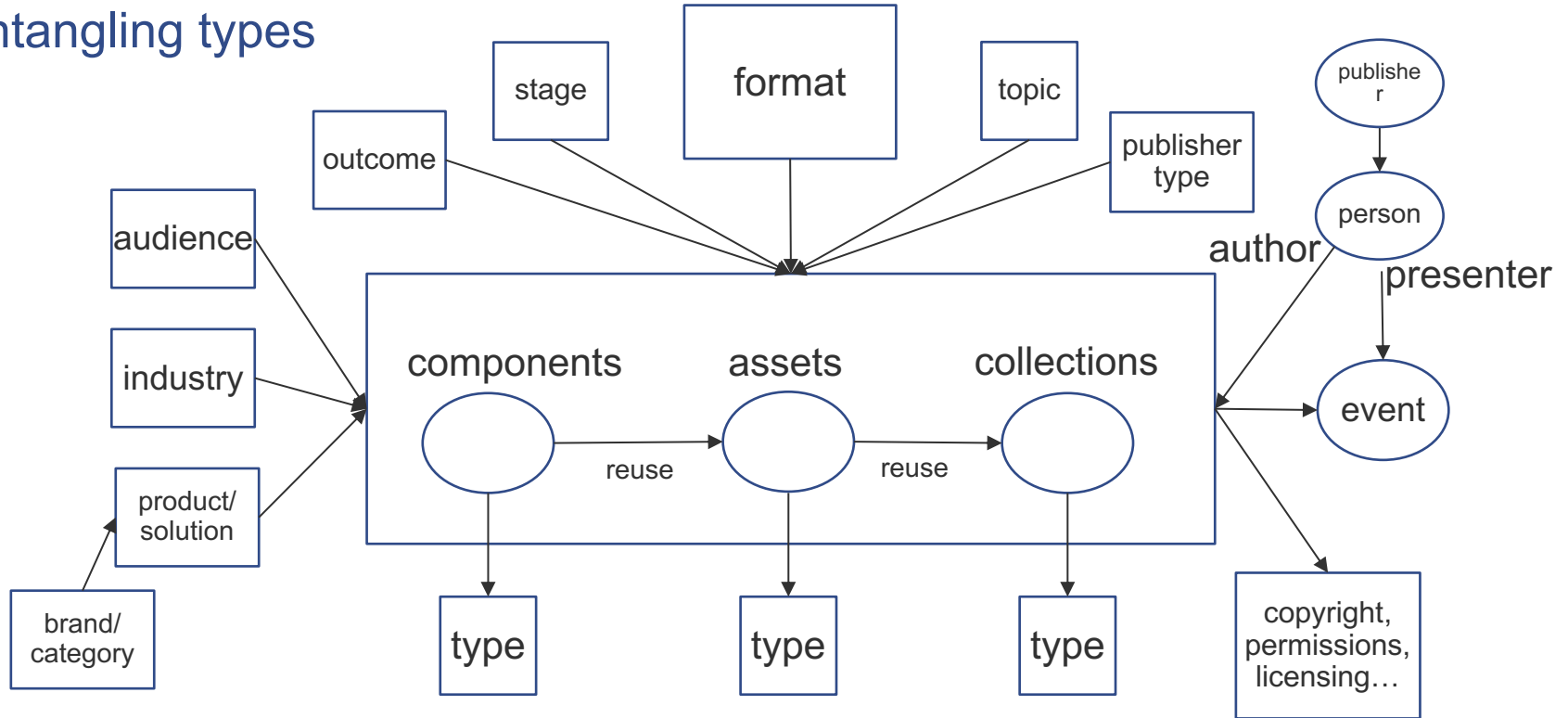
Which require

Consistent tagging

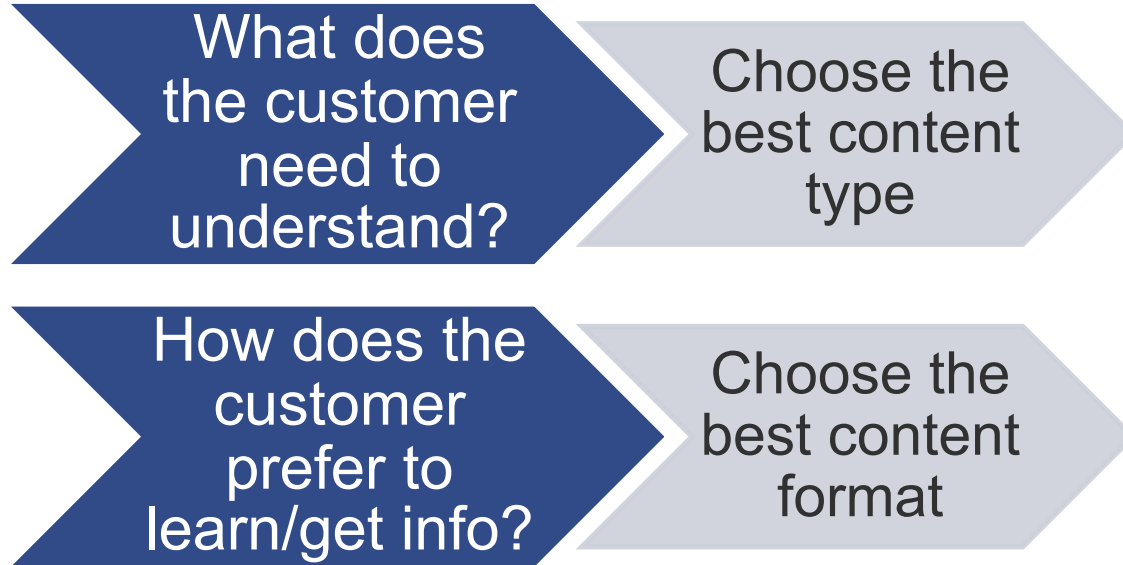
Coordinated education

Standards and governance

## Untangling types

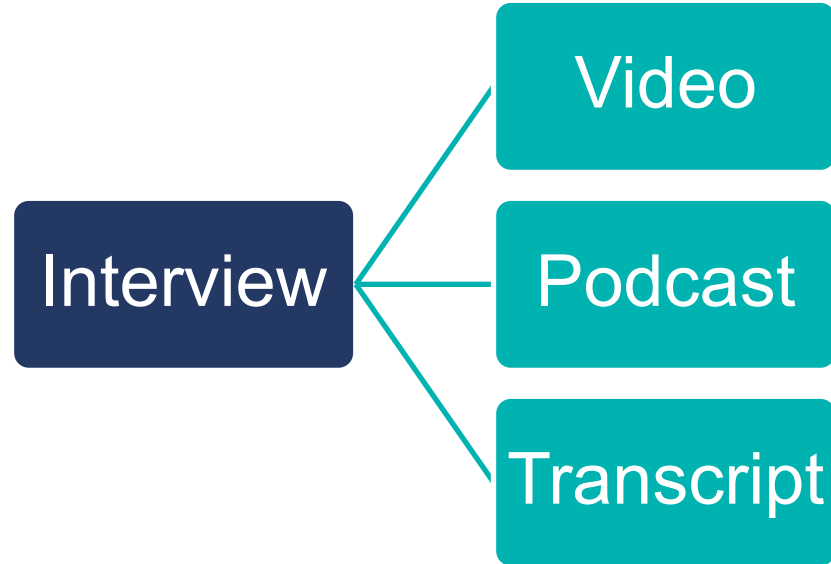


This is a \_\_\_\_ delivered as a \_\_\_\_



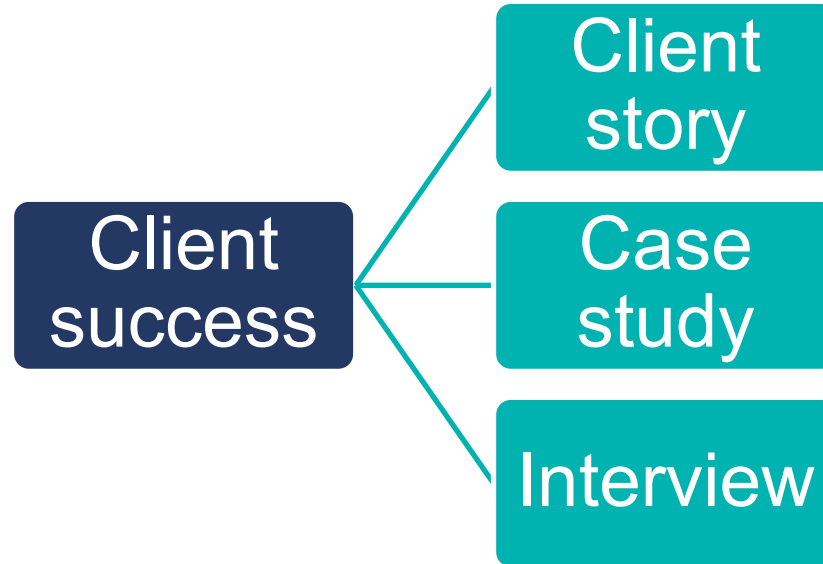
Example: this is a *client story* delivered as a *video*

A single asset may have multiple expressions





A single event or engagement may drive multiple assets



## Is it a type?

### Purpose

- Does it have a distinct purpose from the client POV?
- Could it be defined by a combination of other metadata values instead?

### Value

- For reporting or analytics
- For finding similar content
- For guiding authoring
- For shaping client experience

## What level is it?

Criteria	Level
Is it something the user could be looking for, to read/view/understand? Does it make sense on its own? Would a reasonable KPI be scrolling/watching to the end?	Asset
Is it something the user could be looking for, to navigate/find an asset? Would the user task likely fail if they stopped at this page? Would a reasonable KPI be clickthrough?	Collection
Is it something that doesn't make sense on its own, that always appears as part of other content?	Component

Sometimes types have echoes at different levels  
 A case study asset might be part of a case study collection,  
 might be linked from a case studies card,  
 and might have excerpts/highlights used on other pages

## The winnowing

Ignored*	Got rid of	Merged	Split up	Made room for
Component values	Obsolete values	Under-used values	Type from format	More detailed types from web space
Collection values	Too-general values	Synonyms	Type from audience	Distinctions between formats
Non-marketing values	Compound values		Type from publisher	

\*we came back to these later – there were only ~5

Our MVP (minimum viable product) separating type from format

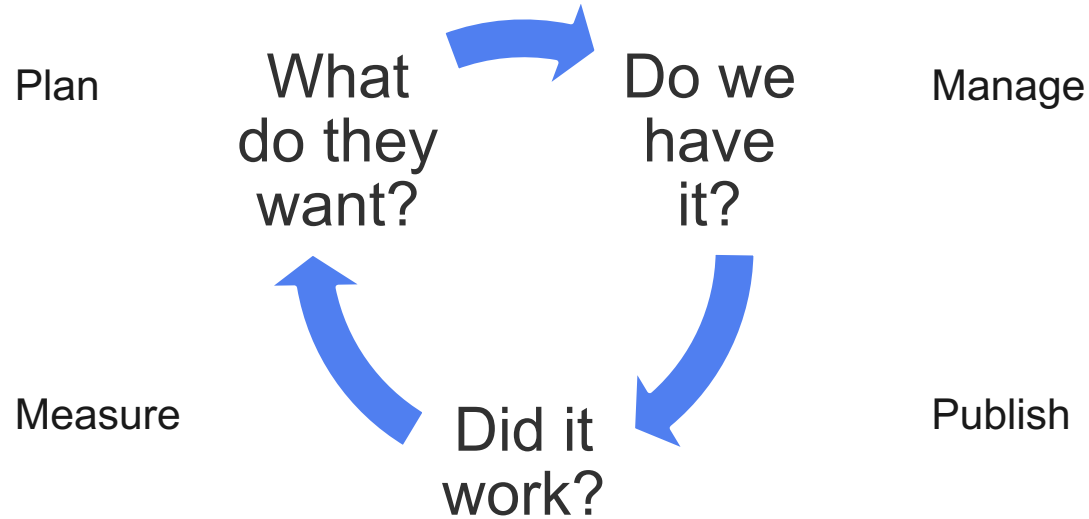
2 taxonomies  
(~20 values  
in each)

3 tools

1 integration

Since tools did not support hierarchies or codes or relabeling,  
lots of compound labels like *Product detail/Data sheet*

# Vision: Building what customers want



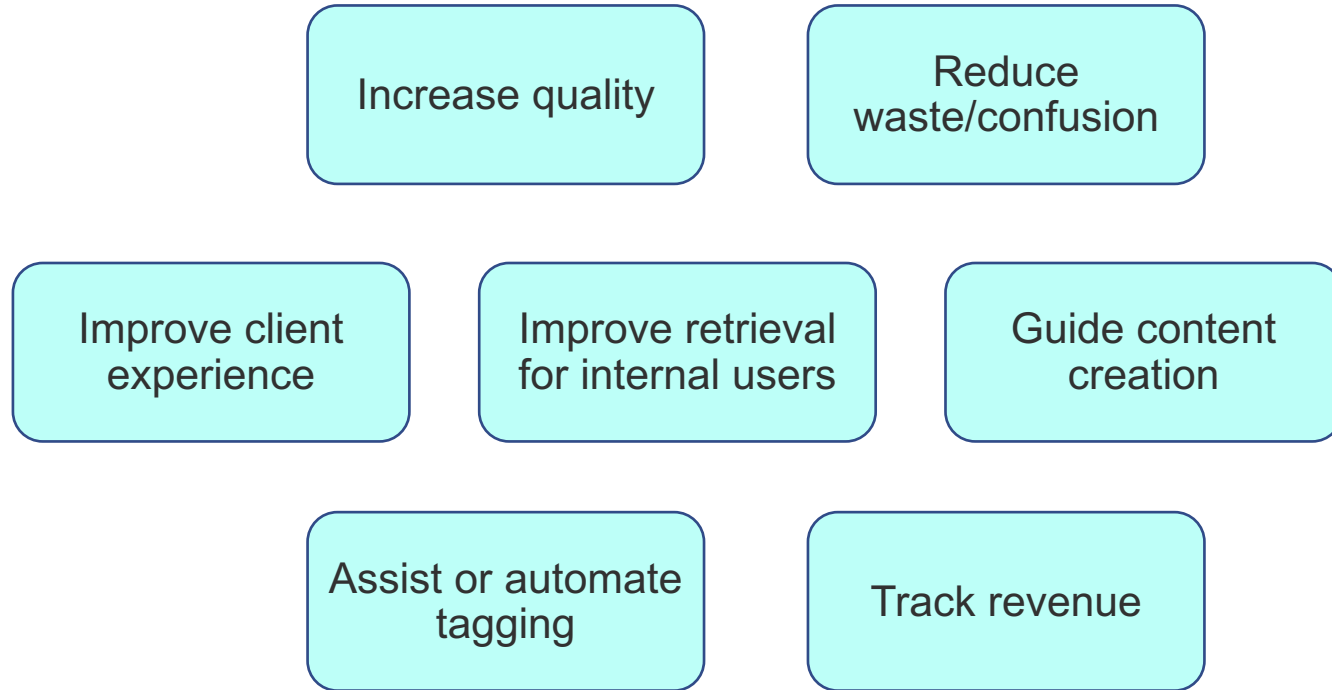
# Complication

## Expanded scope

	From	To
Governance	Ad-hoc meetings, direct executive involvement	Weekly council/guild, checkpoints with execs
Goals	2	7
Tools	3	10+
Taxonomies	2	12+
Organizations	1	5+
Classification scheme	Simple lists	Knowledge graphs and AI
Training	Ad-hoc	Formal, reviewed, recorded



## Expanded goals



## Share components across assets

Text components

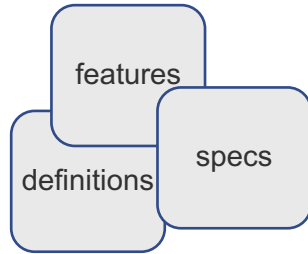
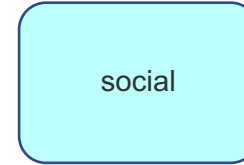
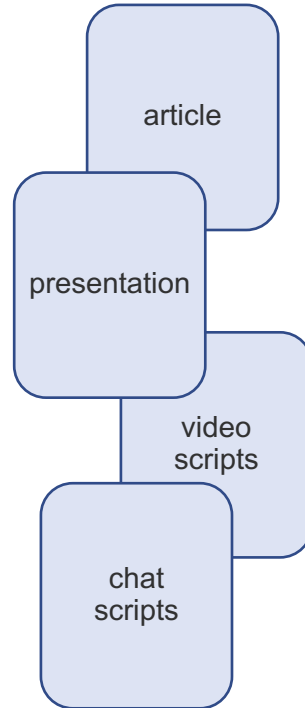
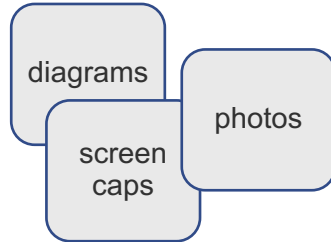


Image components



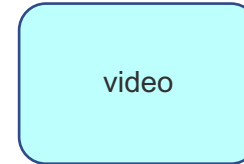
engaged



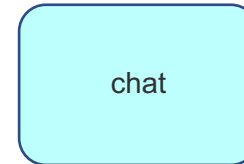
read/scrolled



downloaded



% watched



Chat transcripts

Track across formats

# Day Year in the life of a client

## Business user

I need to get results

"This is awesome!"

"Help I'm stuck!"

"How can I do my job?"

"I need to update my skills"

"I need to get up and running"

"What's next?"

"What should our strategy be?"

"Is this an industry trend?"

"How do IBM products support our strategy?"

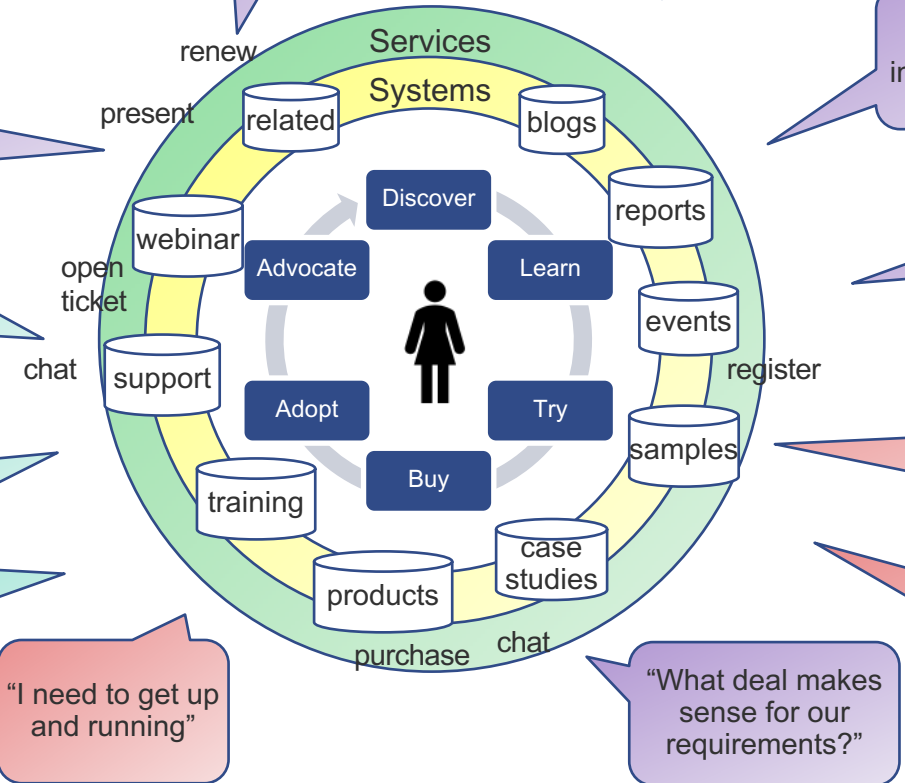
"Can I make this work?"

"Has it worked for others?"

"What deal makes sense for our requirements?"

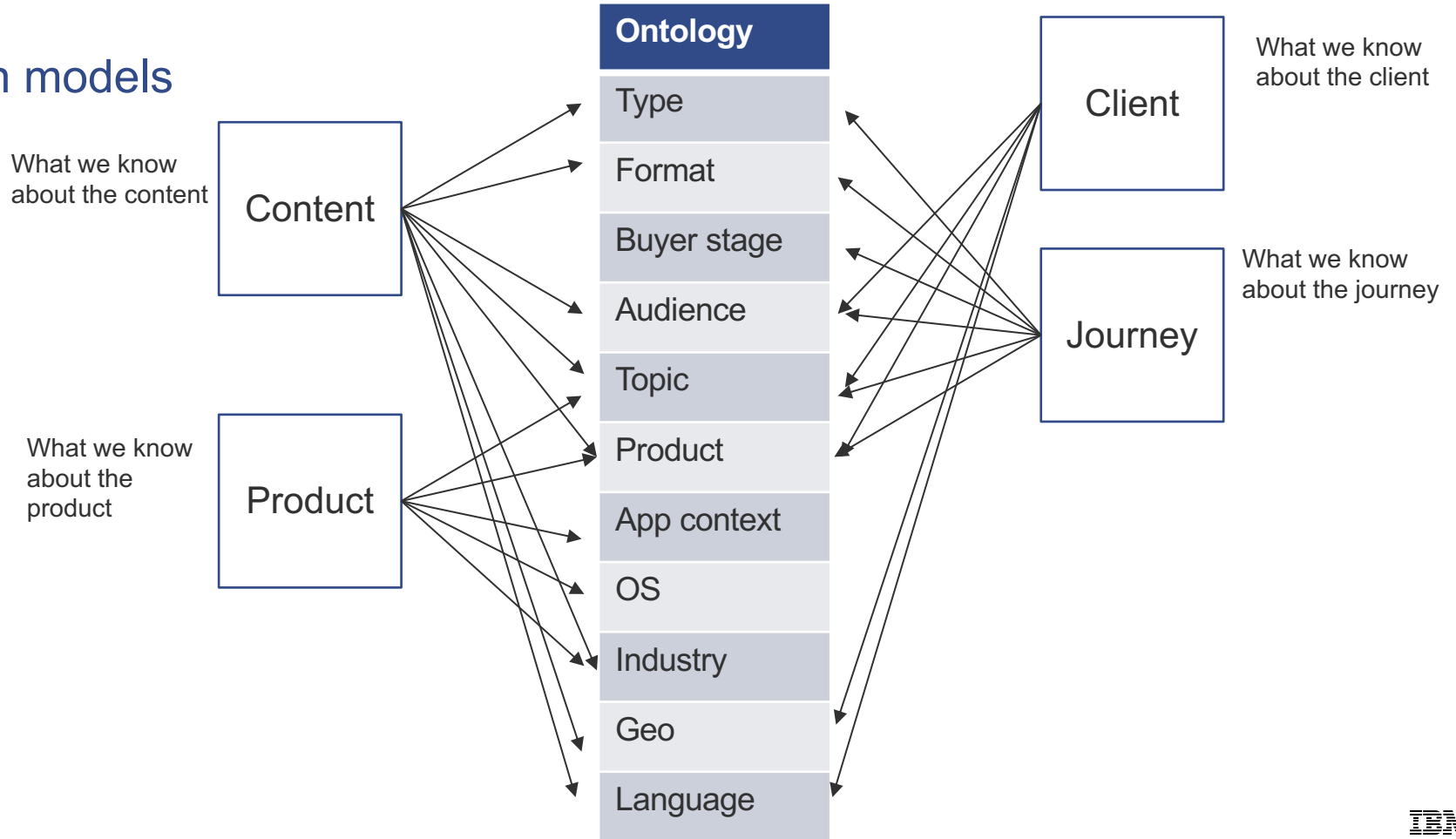
**Exec**  
I need to improve business performance

**Dev**  
I need to make something that will work for my users

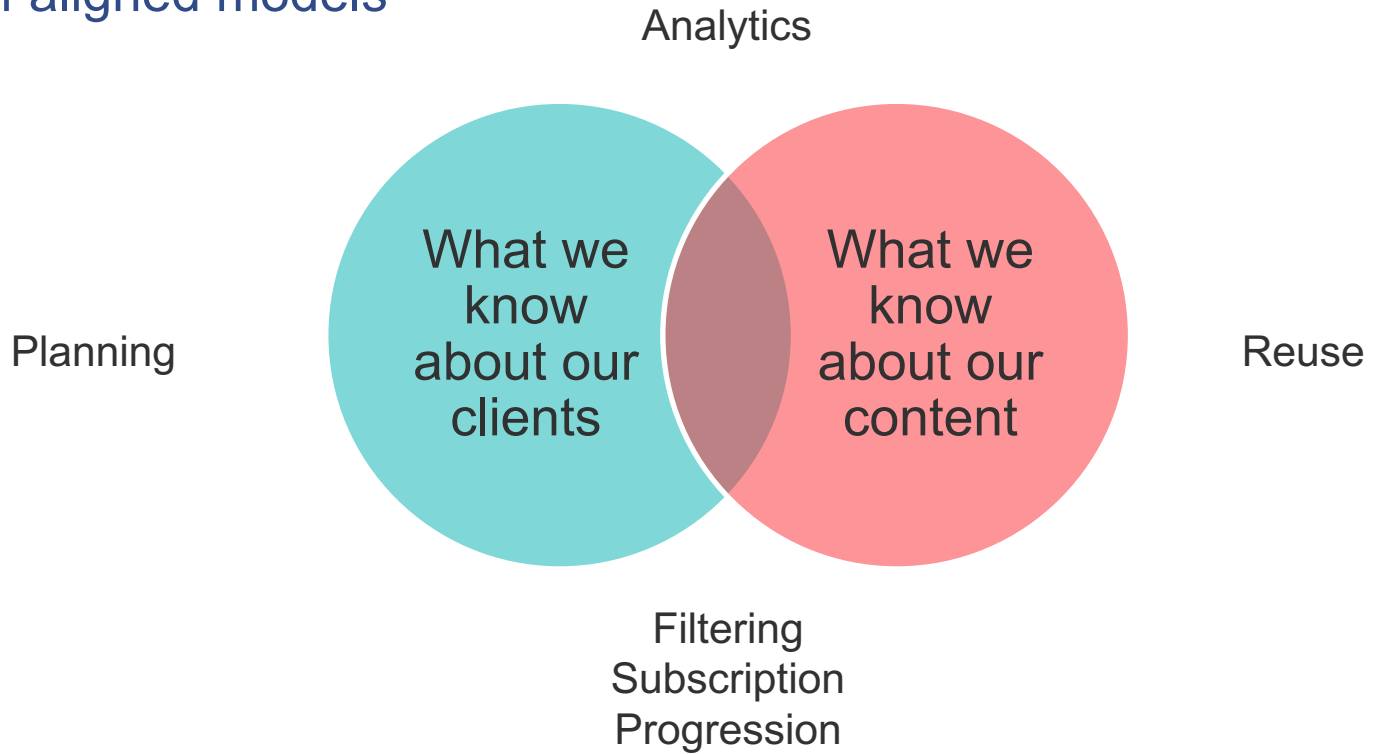


# Resolution?

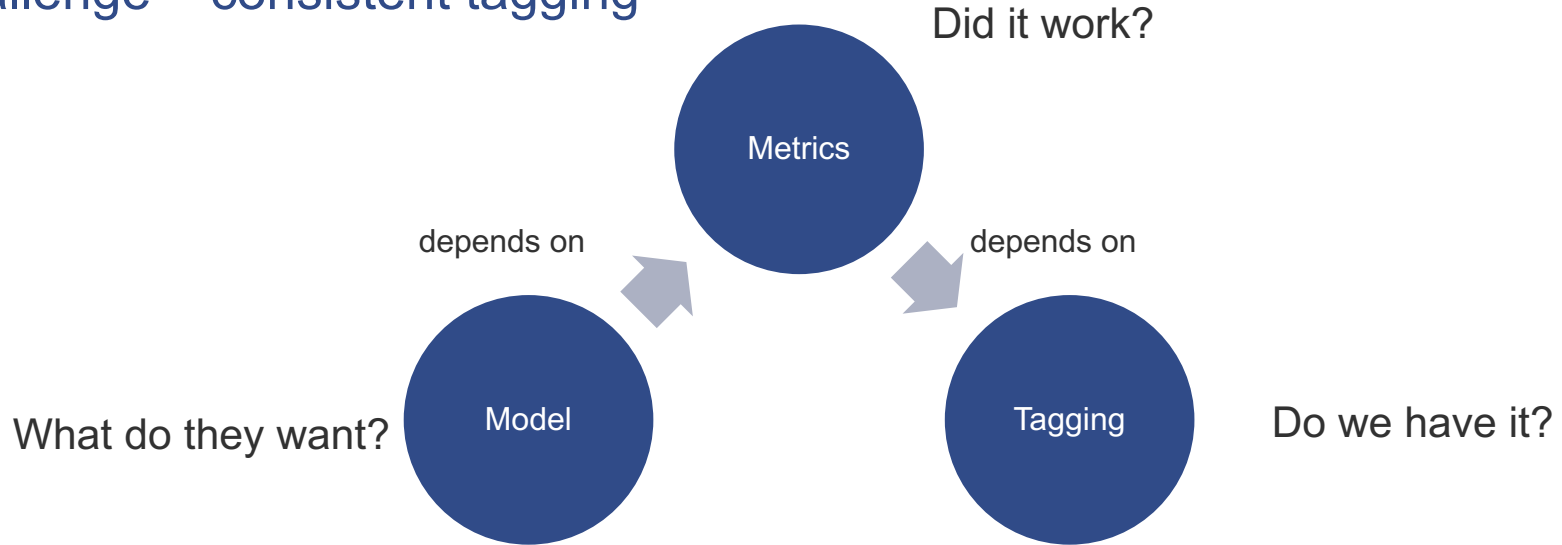
## Align models



## Benefits of aligned models

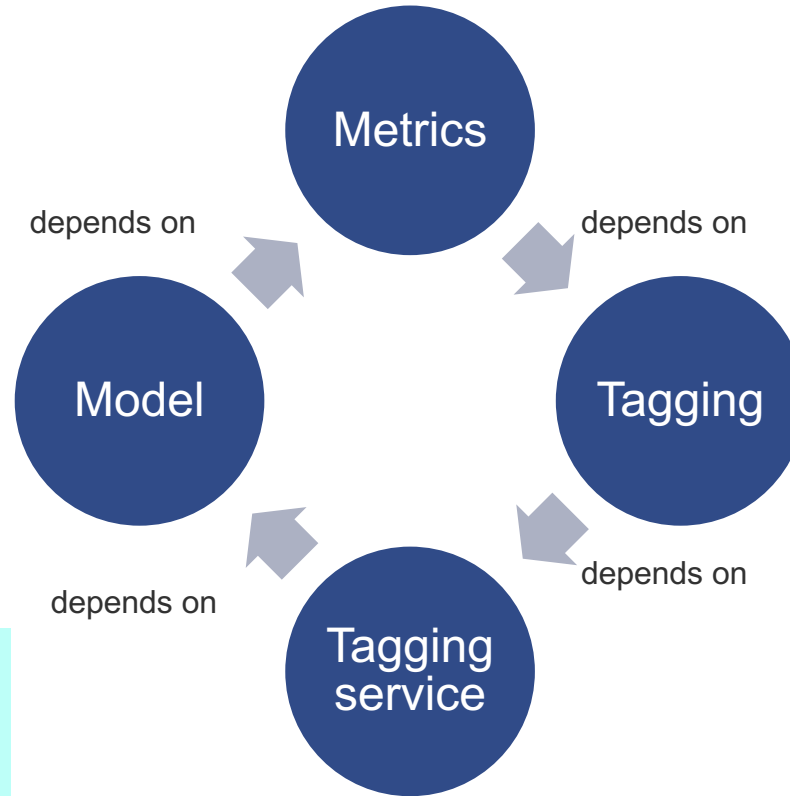


## Challenge – consistent tagging



Who does the tagging?  
Who benefits?  
Will everyone tag the same way?

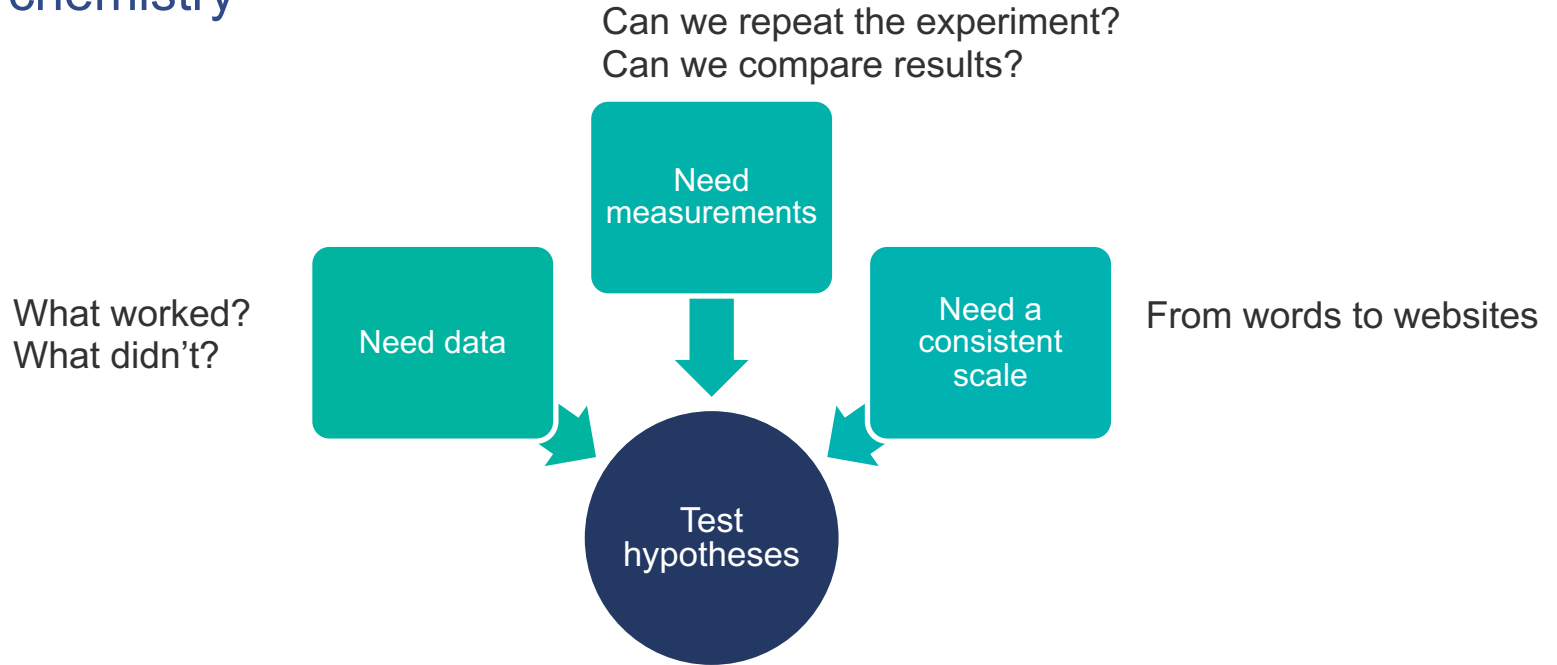
## Kickstarting the cycle



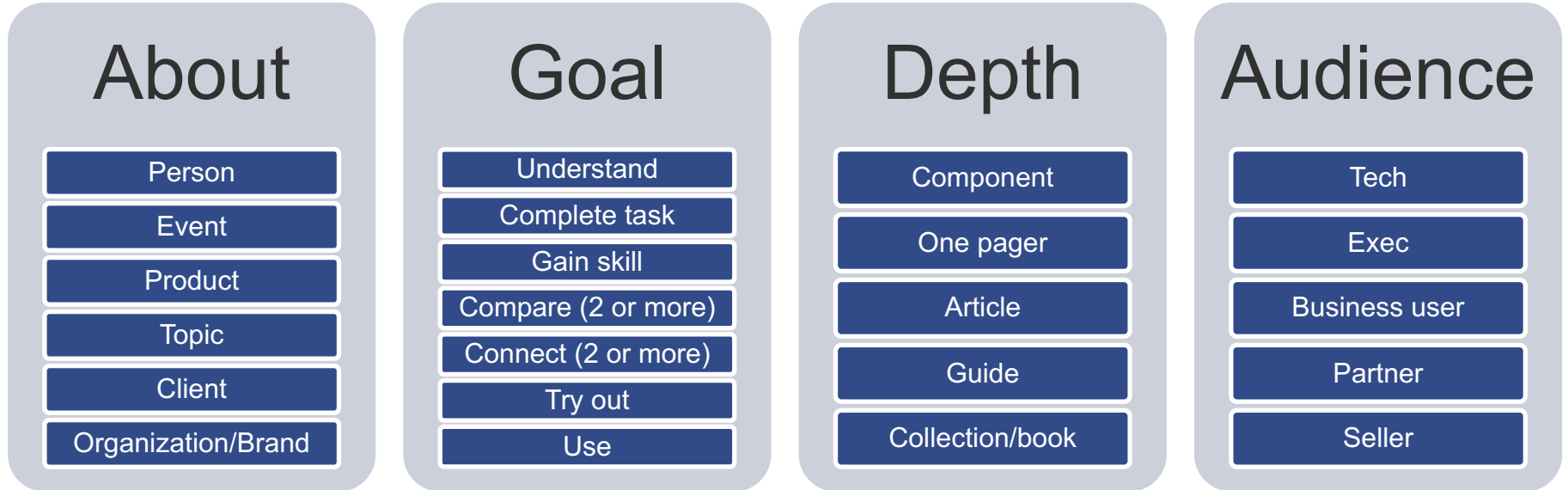
Build model and tagging service to kickstart cycle



## Content chemistry

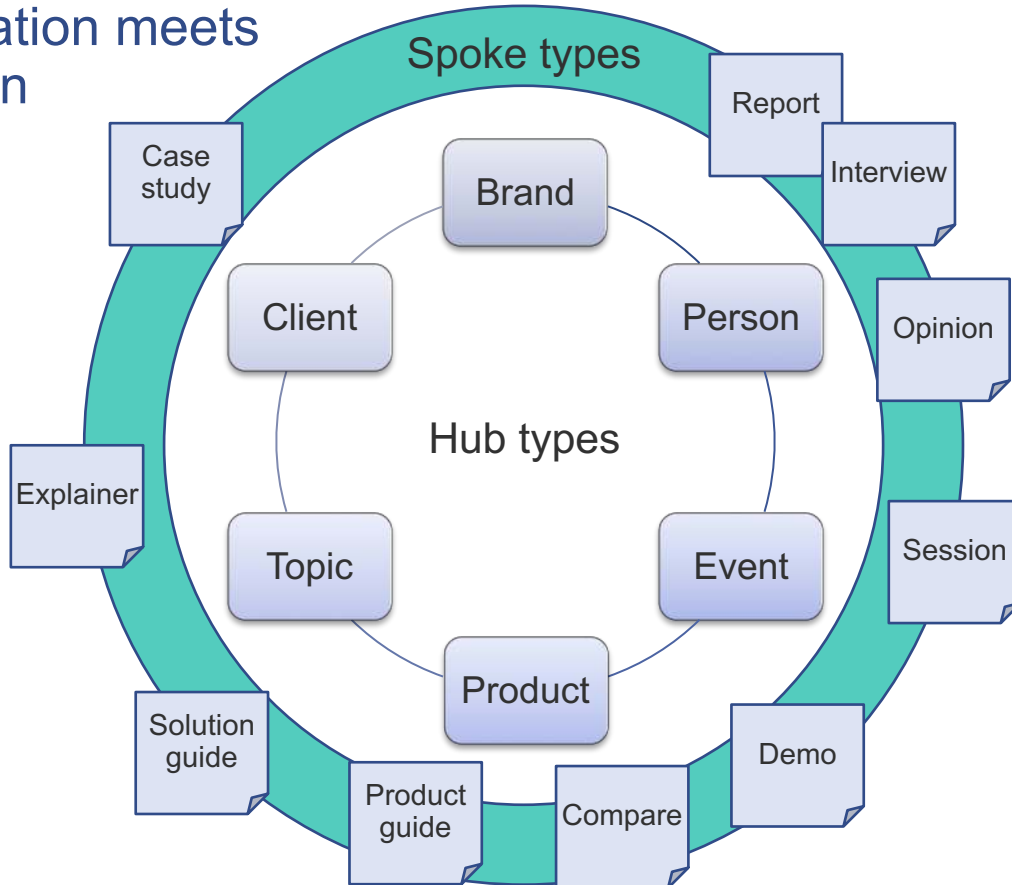


## Deconstructing content type



Additional facets TBD: formality, timeliness, journey stage...

# Classification meets navigation



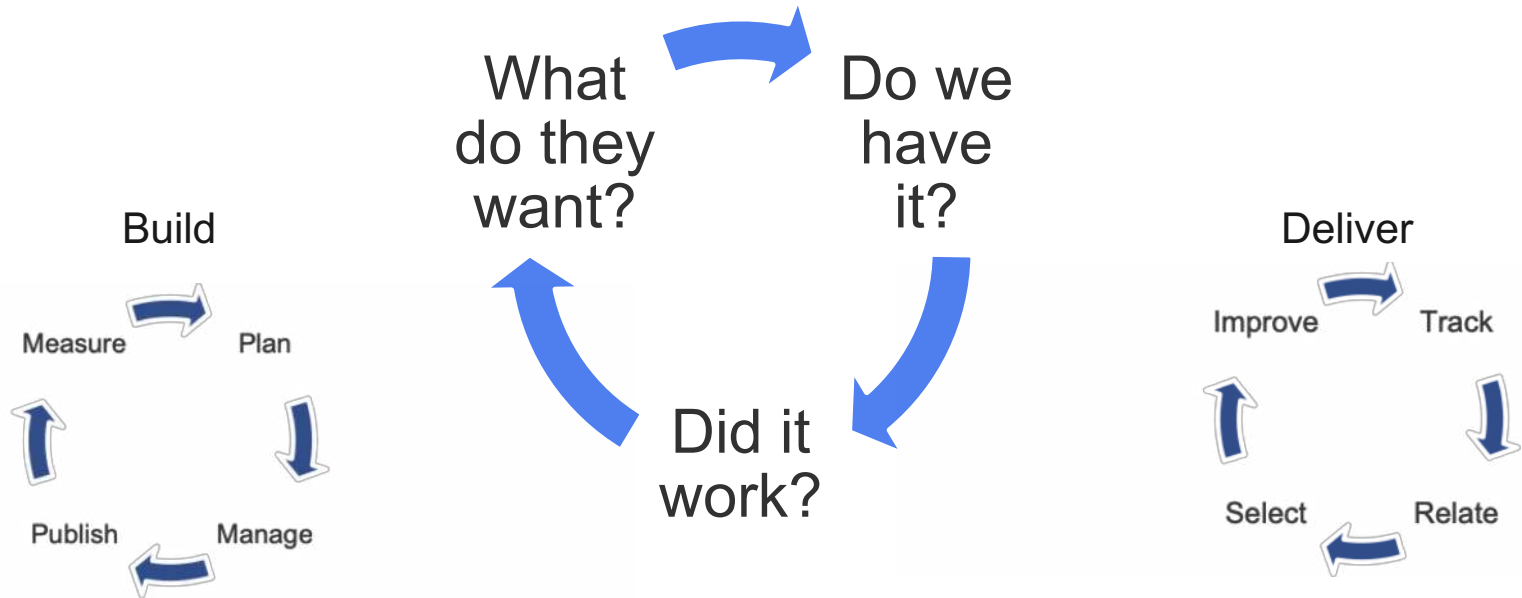
About: Topic  
Goal: Understand  
Depth: Article  
Audience: Exec

## Compound types

**Interview** at an event about a solution

**Case study** about a brand helping a client with a topic/business issue

# Vision 2.0: Giving customers what they want





# Questions