# Content Transformation

## Breathing New Life into Legacy Content

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# What Is Content Transformation?

Content transformation is the process of making existing content more versatile and reusable. It's about liberating content that is locked inside legacy formats and transforming it into a library of modular and dynamic content assets.

Content transformation is typically part of a larger project.

It may occur during a migration to a new content management system or as the "phase two" of implementing an enterprise content strategy. It is also a crucial part of a company's digital transformation.

## What Is Digital Transformation?

Digital transformation is the process of using digital technology to solve business problems.

Using digital transformation, an organization aims to improve business processes, organizational culture, and customer experiences. The hope is that by fully committing to digital solutions, the business can meet customer needs today and be nimble enough to evolve as needs change in the future.

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# What Is Content Transformation?

## Why Is Content Transformation Critical to Successful Digital Transformation?

Digital transformation tries to make some promises:

**Increased sales**
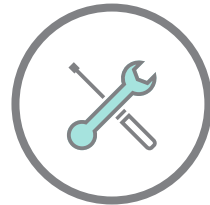
**Better service**

**Improved customer experience**
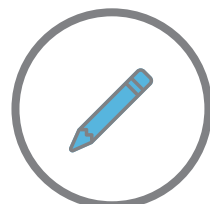
**Better personalization**

It's a big endeavor that can take years to realize.

Digital transformation often involves spending thousands, hundreds of thousands, or even millions of dollars purchasing new tools and technologies. An abundance of platforms can be purchased to help make digital transformation a success.

However – and this is important – no matter how many new tools and systems you throw at it, digital transformation cannot succeed without content transformation at its heart. Just as digital transformation is about unlocking the potential of your business, content transformation is about unlocking the potential of your content.

If you only throw new expensive tools at the problem, but you do not modify your content, you end up with old expensive content. Content transformation is just as important, if not more important, to digital transformation as the new tools you deploy.

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# What Is Content Transformation?

## Which Problem Are We Solving with Content Transformation?

Most of us were taught to write long-form, monolithic content. In this process, we start at the beginning and write to the end. When it's time for an update, we open the document, start at the beginning, and make the changes until we get to the end of our change list.

In marketing, we're taught to write as part of creating an entire piece of collateral. One brochure, one website, one email. The copy, the images, and the illustrations are all created as a whole, rather than as separate reusable pieces. When the campaign is over, that content (and all the effort that went into creating it) is retired.

This is how most enterprise content has historically been written. The type of content doesn't matter. It can be marketing content, technical documentation, training materials, internal materials – pretty much everything we have written in the past has been standard, monolithic content that is wedded to its format and not easily repurposed.

It is not practical to use monolithic content for modern content delivery. Here are a few reasons why:

- Monolithic content does not scale
- Monolithic content is not reusable
- Monolithic content is difficult to tag for searchability
- Monolithic content is full of redundancy and inconsistent messages
- You cannot create a personalized experience using monolithic content

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At the same time, most companies have a plethora of important information locked away in their monolithic legacy content. This information still may be accurate and useful, but it cannot easily be found or reused because it is buried in a monolithic document.

Content transformation solves the problem of lost, outdated, or redundant content by making information easier to find, easier to reuse, and easier to keep current.

## How Do We Solve the Problem?

To meet the needs of digital transformation at scale, your content needs to be:

- Chunked into small pieces (components)
- Reusable
- Easy to locate
- Standard in terminology and writing style
- Easy to combine with other pieces of content

Often, we call this type of content **structured content**.

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# What Is Structured Content?

Structured content is content that is consistent, reusable, and modular. With structured content, even large numbers of authors that are distributed across different teams and working from different locations can create content that fits together in a unified way.

Sometimes, structured content is created and managed in an XML format. XML is particularly useful because it allows you to separate the format of the content from the content itself. This separation makes it easy to use the same component of content for a large poster or a mobile app. Sometimes, structured content is created and managed using DITA. DITA is a subset of XML that defines standard component types and standard tags.

However, not all structured content is created and stored using DITA, or even XML for that matter. You can have small, reusable components of content (sometimes called content fragments) that are Adobe InDesign files, Adobe Illustrator files, CAD files, and so on. The most important thing is that the content is separated into small, reusable pieces. That way, they can be mixed and matched on demand.

## Components - Remember LEGO® Bricks?

Other than stepping on them, remember how much fun it was to build things with LEGO bricks? You could take different types of bricks and then use them to build all sorts of different things. In fact, according to BrickLink.com, there are 83 types of LEGO bricks. The bricks are categorized by the number of "dots" (raised bumps) that they have. Because the bricks are

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# What Is Structured Content?

rectangular, the nomenclature uses the number of dots wide by the number of dots long. This equates to bricks that are 1x1, 1x2, 2x2, 2x4, and on and on. In addition to having different dot configurations, the bricks come in well over 100 colors.

Imagine that each piece of content that you create is a LEGO brick. You can have different kinds of content, like different kinds of bricks. So, you take your bricks and you build something with them.

And now, imagine that you take the same bricks and build something totally different with them. You can use a subset of them to build other things. And so on.

The point is that you can create a small chunk of content and then mix and match it with other small chunks of content to make whatever type of final product you need. And just like LEGO, your content chunks are reusable over and over again.

## Organizing and Tagging Content for Reuse - Taxonomy and Metadata

After you create and gather your content components, you need to organize and tag them so that they can be located and reused later. Otherwise, your components become content needles in your ecosystem haystack.

To organize your content components, you must define a set of categories to classify the content and a set of tags within each category to identify the content. In other words, you need a taxonomy and you need metadata.

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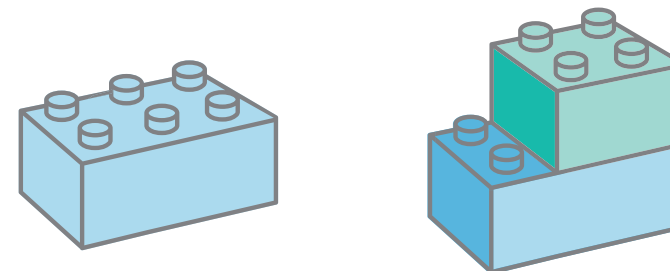
# What Is Structured Content?

## Taxonomy

Content is organized using a taxonomy. A taxonomy is a system of organization or classification. There are many examples of taxonomies in our daily lives. Here are a few:

- Library systems
- Supermarket layouts
- eCommerce websites

Even at home, most of us naturally create taxonomies to locate our stuff. Consider your kitchen. In all likelihood you have:

- Plates in the same cabinet
- Silverware in the same drawer (imagine if you had teaspoons in one drawer and soup spoons in another, forks in a third…)
- Knives in a knife block
- Spices in the same cabinet or drawer

To manage your content components without completely losing your mind, you need to create a taxonomy for them. Your taxonomy will be different depending on your content and your needs. For example, a hotel might have a taxonomy that contains these categories:

- Accommodations
- Dining
- Fitness
- Business Services
- Other Amenities

Meanwhile, a clothing company might have a taxonomy that contains the following categories:

- Brand
- Garment Type
- Color
- Material
- Size

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So how does that work? Each taxonomy category contains a list of metadata, often called "tags," that label the content as part of that category. We organize the content into the taxonomy categories by adding metadata.

## Metadata

Technically speaking, metadata is data about data. Metadata contains descriptive information about a piece of data. For example, let's look at this shirt:



The shirt in this illustration has been tagged with metadata that identifies it. We know that it is a medium size blue cotton t-shirt. Because it has been tagged with this metadata, if we search for any one of the pieces of metadata (name, type, color, material, or size), this shirt will be included in the search results.

When you apply metadata to content, each piece of metadata becomes a tag that can be used to locate that content during a search.

## Faceted Taxonomy

One of the advantages of structured content is that it supports a faceted taxonomy. A faceted taxonomy allows you to put one piece of content into multiple categories. This capability means that you can filter searches and find information from any number of starting places.

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To find the piece of content that describes the blue cotton t-shirt, you can search by multiple categories at once – type, color, and material. This search allows authors to find the description very quickly. They can then reuse the description in the product web page, the printed catalog, the order confirmation email, and the social media ad that promotes a sale.

**Nobody wastes time writing a new description.** No inconsistent messages are introduced by different authors writing essentially the same information in different words. Nobody needs to review or approve a new description, because the approved description already exists.

To use the same content component over and over, you must be able to find it. If you cannot find it quickly and easily, you will end up creating an additional version of the same component.

If you find it, but it's locked inside a legacy document in an old tool, then your best case scenario is that you copy it exactly as-is into a new component in the repository and make it available to all future output. Unfortunately, you still have redundant content, maintained now in two sources. This content inevitably falls out of sync when one source is updated and the other is not. Authors can rarely resist the temptation to "tweak" the content just a little bit when they copy/paste, which can trigger another round of review, approval, and translation.

This is exactly what you **don't** want to do if you want to be successful with digital transformation at scale.

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# How to Transform Your Content

These are the four steps to transform your content:

1. Locate your content
2. Decide which content to transform
3. Determine the best transformation method for each piece of content
4. Do the work

## 1. Locate Your Content

If your company is like most, you have a huge amount of legacy content and it is difficult to locate all the content that has been created over the years. Clearly, the first thing you need to do to transform your legacy content is to find it.

Before you run away screaming, remember that you don't need to transform every piece of legacy content all at once, "just in

case." Curate and analyze your content first to identify pieces that are relevant to your customers and useful to your authors.

In many cases, enterprise documents contain a mix of relevant and irrelevant content. Typically, expert editors and authors can analyze and identify content that is most likely to require transformation. Subject matter experts might be needed to assess highly specialized content.

## Where to Look for Legacy Content

There are a variety of places to look for content that you want to transform. It is likely that your company has filled many repositories over the years or decades.

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Here is a sample checklist to start your content discovery:

- ☐ Every repository
    - – Document control systems (SharePoint, Egnyte, Documentum)
    - – CMS
    - – WebCMS
    - – CCMS
    - – LMS
    - – Support knowledgebase (Salesforce, Zendesk, ticketing systems)
- ☐ Network shares
- ☐ People's hard drives
- ☐ Email
- ☐ Confluence and other wikis
- ☐ In-product content
- ☐ Backs of napkins
- ☐ Slack channels
- ☐ Proprietary publishing systems
- ☐ GitHub and other source code management tools
- ☐ Jira, Trello, and other Agile systems

## Create a Content Inventory

As you find your content, create an inventory. A spreadsheet can be very helpful for this. Include information that will help you make decisions about how to handle the content. For example:

- Filename
- Location
- Topic
- Date of latest update
- Writer
- Analytics that show if the content is still in use or popular

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# How to Transform Your Content

Inventories can be time-consuming to create. However, if you don't know which content you have, you can't decide which content you need to transform.

## Need Help? We're Here for You

Often, at this point, companies realize they don't have the resources available to continue with content transformation. That's okay – that's why we're here for you! In fact, some of our customers realize this halfway through compiling their content inventory and then they reach out to our team. Sooner is better than later. Don't hesitate to contact us at **info@contentrules.com** for help.

## 2. Decide Which Content to Transform

Now that you know what content you have, it's time to make some decisions. For each piece of content, you'll need to decide whether to:

- Convert the content format and split the content into reusable chunks without rewriting it
- Convert the content format and rewrite the content in reusable chunks according to best practices
- Leave as-is, do not transform

## Transformation Criteria

Here's a list of criteria that you can use to determine whether you should transform content. We recommend prioritizing content that meets three or more of these criteria:

- Still in use / popular
    - Customers search for this information

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- – Analytics indicate this information is accessed often
- – Customers call support for this information
- Updated often
- Highly visible products
- Has high reuse potential
- Areas that we know customers have trouble
- Evergreen content – does not update often, but is always useful or used
  - – Glossary
  - – Product descriptions
  - – Definitions
- Boilerplate content
  - – Legal
  - – Regulatory and compliance information

You may have other criteria to add to the list. That's great! Add it and evaluate your content honestly. It's easy to get attached to

content and then waste resources transforming content that does not provide enough ROI to be worth it.

## Content to Leave As-Is

Some legacy content is not worth transforming. Don't convert:
- End of life'd products
- Short-term campaign content
- Event announcements
- Time-dependent content
- If expense of converting is more than the value of the content
- Unpopular content (analysis)
- Poorly written content (better to rewrite it)

If you are working with Content Rules, we take a first pass at analyzing content against the transformation criteria. Then we work with your team to make the final decisions before proceeding with transformation.

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## 3. Determine the Transformation Method

There are three methods for transforming content:

- Software only
- Software + revision
- Software + revision + optimization

### Software Only

Conversion software migrates content from one format, such as Adobe FrameMaker or Microsoft Word, into another format, such as XML. It does not rewrite content or optimize it for reuse. However it can convert large volumes of content very quickly. Because the content itself is not revised in any way, we recommend this method for content that you want to bring into the central repository, but that you do not plan to reuse or update very often.

The result is legacy content that you can search, manage, and publish from your repository.

### Software + Revision

The software + revision method combines software conversion with an editorial pass. The editorial pass focuses on modernizing the content and making it reusable. Here are some things an editor will do:

- Revise content to comply with your content models or templates
- Organize content according to your taxonomy
- Tag content with your metadata
- De-duplicate and consolidate redundant information into single-sourced, reusable content

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Editors can also archive or delete obsolete content and work with SMEs to ensure that all revised content remains accurate and approved.

If you have vast amounts of content – and most companies do – you might use software to automate the discovery of content that is potentially reusable. Editors can then consolidate, revise, and update as necessary to make the content truly reusable.

We recommend this method for content that you want to keep current, reuse from a single source of truth, and modularize for use in different outputs (such as web pages, online help systems, eLearning modules, support knowledgebase, chatbots, and PDF manuals).

The result is updated content that you can search, manage, and publish from your repository. Your users and your writers benefit from content that is easier to find, easier to comprehend, and easier to use.

This method is sufficient for some of our customers. However, if you're planning to add personalization to your content delivery or if you are undergoing a digital transformation across the enterprise, you'll want to add optimization.

## Software + Revision + Optimization

This method is a complete content transformation. In addition to conversion software, you use optimization software in conjunction with editorial revision to ensure that all content uses the correct terminology, grammar, style, and tone of voice.

Content optimization software is configured to match your corporate style guide and your corporate terminology. It enforces compliance by flagging every term and sentence that does not follow the corporate rules.

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# How to Transform Your Content

In addition to converting the file format and revising the content, as above, the editor also runs your content through the content optimization software and corrects any errors.

We recommend this method for content that you intend to personalize, deliver dynamically, or present using emerging technologies such as virtual assistants.

This method results in content that you can deliver in a fully dynamic, automated, "intelligent content" ecosystem. This content is future-proof and ready for reuse in any output.
If you plan to move toward machine learning or training a cognitive system, this method is a must.
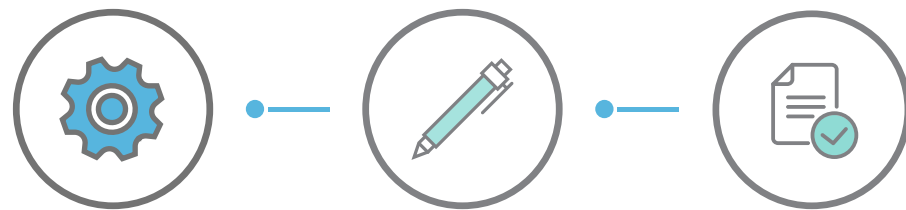
## 4. Do the Work

Now that you have located your content and determined which content to transform at which level, it's time to get in there and do the work.

And it's worth it to do the work. Transforming your content as we describe in this eBook makes your content ready for anything. For at least 30 years, we've known that componentized, structured content is the key to:

- Intelligent content delivery
- Training cognitive systems
- Adapting content to the ever-growing array of delivery platforms your content teams must reach

However, until the past 5 years or so, the systems to support all this were not fully mature.

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# How to Transform Your Content

But as customers have come to expect a much more personalized experience (thanks, Amazon) ... and as the amount of information coming at us every day has increased exponentially (thanks, Facebook) ... and as the reality of cognitive systems has taken hold (thanks, IBM Watson) ... content teams are increasingly under pressure to deliver content in new and innovative ways.

To do that, you need to move to structure. And if you're moving to structure, it's the perfect time to increase the value of all your content.

## Need Help? We're Here for You

Some of our customers get this far simply by transforming the content as part of their regular release cycle. However, in most cases, the demand for modularized, reusable content escalates faster than content teams can keep up. That's where we can help. We can transform your valuable legacy content while your team continues to focus on developing new content. Don't hesitate to contact us for help.

## Contact us!

Email us at info@contentrules.com to schedule time to chat with one of our expert consultants.

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# Best Practices for Transforming Content

Before you start deleting four out of five versions of the same content, you'll need to make sure that the version that you retain is reusable.

When our editors work on content transformation projects, they follow your structured authoring guidelines and comply with your information architecture. They work with your style guide and corporate terminology.

They also bring these best practices to their work:

- Write (or rewrite) in small chunks
- Use discrete content types
- Standardize terminology
- Avoid dependent language
- Make sure titles are consistent
- Start strong

## Write in Small Chunks

It is a fairly simple equation: The longer that your chunk of content is, the less likely it will be reusable. The opposite is equally true. The shorter and more focused that your chunk of content is, the more likely it will be usable in a variety of settings.

A good rule of thumb is to limit the size of your chunk to a single heading level. For example, if you can chunk at your lowest heading level (for many that's a heading level 3), that's great. You are much more likely to have a single thought or topic in a single heading level 3. It might be that your content naturally divides at a heading level 2. That's fine. This isn't a strict rule, just one way of looking at how to create components.

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# Best Practices for Transforming Content

A content chunk needs to be small enough that it contains one – and only one – thought, point, or idea. Yet it needs to be large enough to cover the entire idea and stand on its own. Chunks should not be dependent on other chunks to make sense. Each chunk must be self-contained. After all, you never know where a single chunk will be reused, so it should contain everything your reader needs to understand that single idea, and not one word more.

When you have an assortment of chunks, you can assemble them into a hierarchy. When you assemble them, the chunks can be in any order that you need and can be used to create a variety of different outputs. In fact, different outputs may use the same chunks of information in a completely different order.
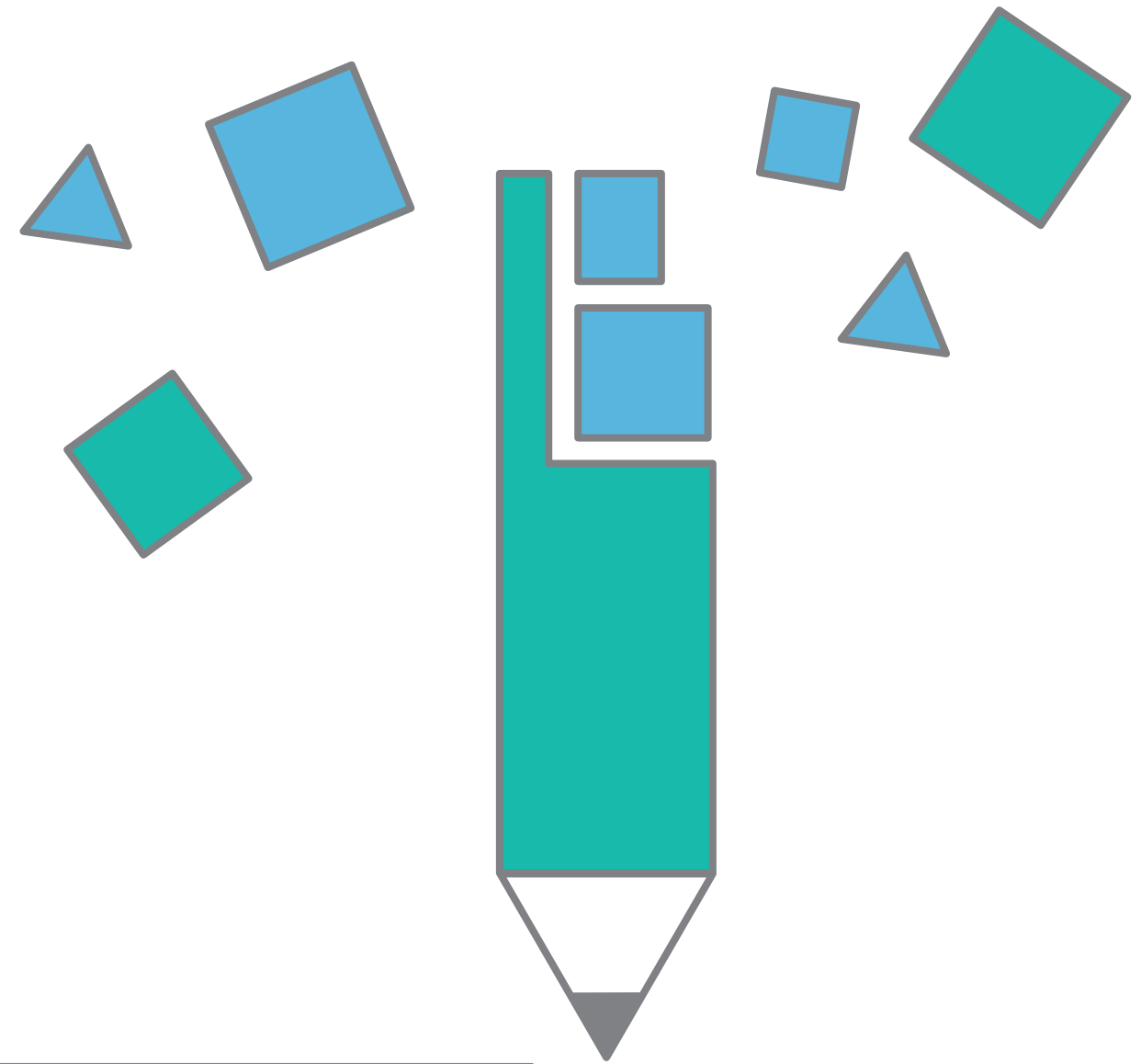
# Best Practices for Transforming Content

## Use Discrete Content Types

Another way to look at chunks of content is to focus on the type of content. Some common types of chunks include:

- Task (procedure with steps)
- Conceptual information that explains a single idea or item
- Reference information (often contains tables of data)
- Product description
- Video tutorial
- Quiz

One aspect of making your content reusable is assigning a content type to it. If you cannot assign a type to a content chunk, you need to ask yourself if it is important to maintain.

For content to be at its most reusable best, an individual content chunk should contain only one type of content. This means that you should separate the conceptual information about

why performing a task is so important from the actual steps to perform the task. The more that content types are mixed, the less likely the chunk can be reused.

For example, conceptual information is often reusable across technical content, marketing content, training content, and even sales content. If you include the installation step with your conceptual information, the resulting content chunk is not going to be reusable in marketing or sales outputs. It is best to keep to a discrete type of content for each chunk to maximize its reuse potential.

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## Standardize Terminology

When your audience experiences your content, you want the content to flow seamlessly from one chunk to the next. It should not be obvious to your reader that the content was originally created by different people at different times for different documents.

For chunks of content to fit perfectly together like LEGO bricks, all content creators must use the same words to describe the same thing. If your writers use a variety of words to describe a concept instead of standardizing on one word, you risk that the content will not make sense when it is assembled and delivered.

Here's an example. Let's say that four of us are creating a set of content chunks that, when published, will produce a guide on how to take care of Moose.



*Moose*

Each of us is assigned a chunk of content to create: walking, feeding, grooming, and training. If we do not standardize our terminology, we can easily wind up with these chunks:

- How to walk the dog
- How to feed the canine
- How to groom the pooch
- How to train the hound

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# Best Practices for Transforming Content

When we combine these chunks and publish a guide to taking care of Moose, people will be very confused. Is a dog the same as a hound? A canine?

To combine chunks of content successfully, we need to decide what we will call Moose and then be consistent. If your content is more complex than the care of Moose (and it likely is), your terminology is even more important.

## Avoid Dependent Language

Each chunk of content must stand on its own, so you must avoid dependent language. Dependent language includes:

- A chunk of content that refers to another chunk of content
- A chunk of content that requires users to read another chunk to understand this one
- Words that anchor the content in time or space

Here are some examples of the same information written using dependent language and corrected to not use dependent language:

| Dependent Language | Independent Language |
| --- | --- |
| **Now,** you make video calls from your wrist. | You can make video calls from your wrist. |
| **Previously in this document**, Example A showed that puppies are cute. | Puppies are cute. See Example A. |
| See Example B **later in this document**. | See Example B. |
| **As discusssed before**, kittens are **also** cute. | Kittens are cute. |
| **Currently**, the app does not offer an alternative. | This app does not offer an alternative. |
| **In this release**, kittens and puppies are included. | Release 123 includes kittens and puppies. |

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# Best Practices for Transforming Content

Inline links and cross-references are another type of dependent language. When we write in a nonreusable, monolithic paradigm, it is easy to include links and cross-references to content that exists anywhere in the "book."

When we write for reuse, inline links and cross-references to other chunks render the chunk not reusable. **Authors can't always know whether the cross-referenced chunk will be included in the same final product.** The closer you get to delivering personalized content, the higher the risk that inline links and cross-references will break in the final output.

**The good news is**, when the content is chunked well and tagged consistently, the need for links and cross-references is greatly reduced. Customers are much more likely to find exactly the information they need quickly. They won't need to scan through a long document or rely on authors to send them to other chapters just to find the one paragraph that answers their question.

Make sure that all the information you need for the chunk is contained in the chunk. If the outside information is critical for understanding this chunk, include the information in the chunk. And resist the urge to link or cross-reference the "nice to have but not critical" content wherever you possibly can.

## Use Consistent Title Styles

When we write just for ourselves (in other words, not for reuse), it is easy and desirable to be creative. After all, when I was in fourth grade, Mrs. Levin taught us two important things:

- Never say the same thing the same way twice
- Use complicated, multisyllabic words to show off your superior vocabulary

# Best Practices for Transforming Content

Unfortunately, both of these language arts lessons are exactly the wrong way to write for reuse.

Just like we must standardize terminology, we must standardize the style of our titles. That way, we can mix and match our chunks and the result will be easy for our users to read. When our titles are inconsistent, navigation is more difficult. Inconsistent titles also look messy when assembled in lists and final information products.

Best practice is to make sure that your title indicates the type of content that follows. **Here are some before and after suggestions for title styles based on content type.**

| Content Types with Messy Titles | Standardized Titles |
|---|---|
| **Task (step-by-step instructions)** | **Begin with an imperative verb** |
| • Creating User Groups | • Create a New User Group |
| • User Management | • Modify a User Group |
| • Grouping accounts | • Manage Account Groups |
| **Product description** | **Product name + noun from list of allowed nouns** |
| • Introduction to Wonderful Product | • Wonderful Product Overview |
| • Wonderful product | • Wonderful Product Features |
| • Features: WP | • Wonderful Product Features |
| **Video tutorial** | **Tutorial + colon + imperative verb** |
| • How to create user groups in WP admin console | • **Tutorial:** Create New User Group |
| • Creating WP user groups (Video) | • **Tutorial:** Modify User Group |

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# Best Practices for Transforming Content

Your specific title style may be different. The important thing is to have a style that everyone uses consistently.

## Start Strong

Pretend that users will only see the title and the first sentence of your content chunk. Make sure your first sentence answers the question that the title implies.

Often, we like to "wax poetic" and "ease in" to the topic of our chunk. Doing so forces users to read – or worse, listen to – extraneous words before they get to the real content. Easing into a topic reduces overall usability and increases the risk that the user will leave before they realize that the answer they need is just a few sentences away.
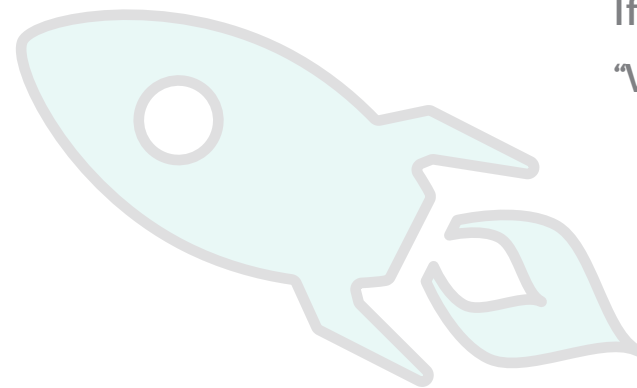
Here is an example of a chunk that starts strong.

### Measles (Rubeola)

## Complications

Common complications from measles include otitis media, bronchopneumonia, laryngotracheobronchitis, and diarrhea.

Even in previously healthy children, measles can cause serious illness requiring hospitalization.

- One out of every 1,000 measles cases will develop acute encephalitis, which often results in permanent brain damage.
- One to three out of every 1,000 children who become infected with measles will die from respiratory and neurologic complications.
- Subacute sclerosing panencephalitis (SSPE) is a rare, but fatal degenerative disease of the central nervous system characterized by behavioral and intellectual deterioration and seizures that generally develop 7 to 10 years after measles infection.

*Source:* United States Center for Disease Control (CDC).

If we read only the first sentence, we can answer the question, "What are the complications from measles?"

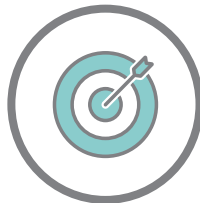content rules®
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# Summary

To support digital transformation, you must include content transformation. Content transformation takes monolithic, legacy content and converts it to structured content so that it can be reused. The benefits of transforming your content are many:
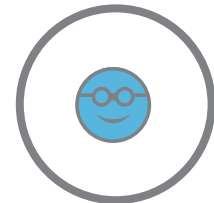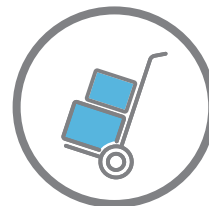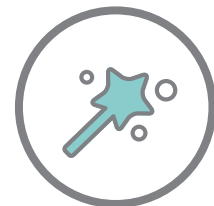
Save money
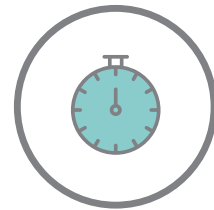
Save time

Improve accuracy

Enhance customer experience

Deliver personalized content

Fulfill the promise of digital transformation

It is not surprising that organizations are creating strategies for transforming their content. Whether it is across different models of the same product, different products, or different types of content (marketing / technical / training), it makes sense to write once and use everywhere.

Transforming your content involves these steps:

Locate the content (yes, ALL the content)

Decide if you will transform it and the method you will use (software, humans, both)
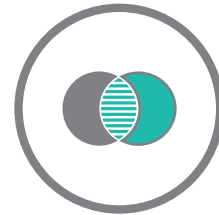
Transform the content

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# Summary

These are the six best practices that we recommend when you create or transform content:
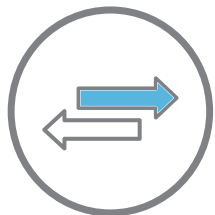
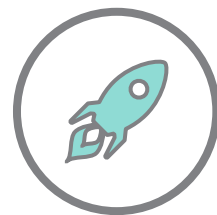**Write in small chunks**

**Use discrete content types**

**Standardize terminology**

**Avoid dependent language**

**Make sure titles are consistent**

**Start strong**

These best practices will help transform your existing content and the content you will write in the future.

Digital transformation makes many promises. To fulfill those promises, you must transform the content first. Otherwise, you'll end up with expensive new tools and the same legacy content. But now you'll have expensive legacy content.

Unlocking the potential of existing content is what content transformation is all about.
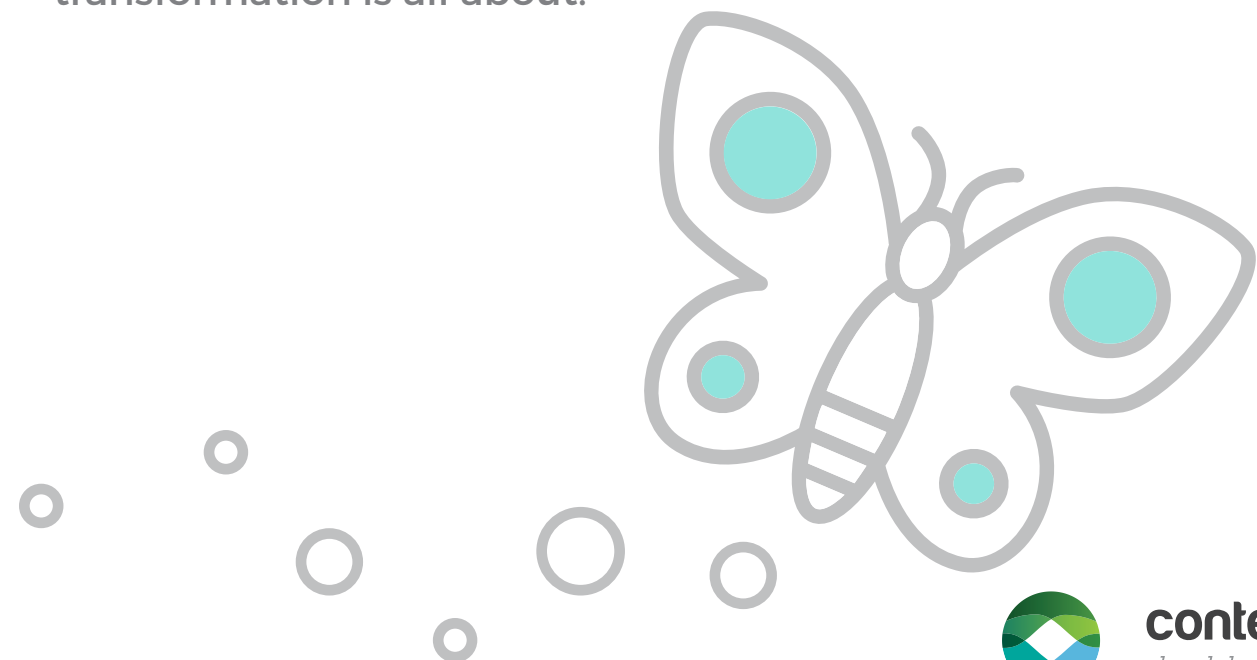
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# Overwhelmed? Content Rules Can Help

Content transformation can be overwhelming for a team that is already adjusting to new systems, new ways of writing, and new processes.

In many cases, content transformation is part of the "phase two" requirements for implementing a content strategy. (The "phase two" that your team will never have the time or resources to complete.)

That's why Content Rules is here to help. We have decades of experience solving complex content challenges with our customers. We are delighted to help you with yours.

Contact us today at **info@contentrules.com** to schedule time to chat with one of our expert consultants.

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# Content Transformation Toolkit

We take advantage of several tools to automate content transformation.

## Conversion Software

There are applications that convert content from one digital format to another. For example, you can use conversion software to convert a whole library of Microsoft Word documents, PDFs, and Adobe FrameMaker files to XML. You can also convert from one XML standard to another, such as from DocBook to DITA.

Conversion software can migrate your source content quickly and at scale. However, it can't transform the content itself. Just because the format of the content is usable doesn't mean that the content itself can be reused. For that, you need experienced

writers and editors who can review your content, understand its purpose, and transform it for maximum impact.

It also takes human expertise to define the rules for mapping one format to another.

Content Rules works with partners who provide conversion software and services. We can help you determine whether to use a conversion service, to license conversion software to convert content in-house, or to convert content manually.

## Content Optimization Software

Content optimization software is the most effective way to enforce common terminology, style, and grammar throughout

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your enterprise content. Optimization software is an automated way of checking your content against your corporate standards and enforcing compliance with those standards.

There are two paradigms for providing style, grammar, and terminology guidance to content creators: pull and push.

## Pull Paradigm

The pull paradigm works by having the content creators locate the required reference material and look up the answer. For example, a table of approved terminology or a PDF style guide. When the writer creates content, they use the reference material to research the correct terms and sentence structures. In effect, they "pull" the information from the reference material.

These are the many potential problems with the pull paradigm:

- The reference material is difficult, time-consuming, or impossible to locate
- The reference material is out of date or inaccurate
- The reference material does not mention the term or phrase that I am looking up
- The writer simply doesn't have time to use reference material because they are under deadline under deadline and publishing the content is always more important than making sure the grammar, style, and terminology is accurate

## Push Paradigm

Content optimization software uses the push paradigm. The push paradigm works by using software to check the content,

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compare it to corporate standards and terminology, and automatically send the correction to the content creator. The software either runs in the background and checks keystrokes or is accessed by some type of "check" button.

The push paradigm is the only way to enforce compliance with corporate style, grammar, and terminology. Any other paradigm is leaving consistency to chance.

Content Rules offers a variety of content optimization services to ensure consistency and quality content. In our SaaS offering, we configure your corporate standards and terms in our software. Then, using our large pool of senior editors, we check and correct your content. We can even provide "before" and "after" reports, so that you know what

has changed. If you already own content optimization software, we provide services to make sure it is always up to date and contains the latest standards from your company. If you do not own content optimization software and are interested in purchasing, we resell some of the most powerful optimization tools on the market.

Contact us at **info@contentrules.com** for more information on any of these services.

## Content Reuse Discovery Software

Content reuse discovery software ingests a large body of content and searches for content that is either exactly the same ("exact match") or almost the same ("fuzzy match"). It produces a report

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that shows where all the duplicative content is so that human editors can quickly find it, curate it, and transform it. Some software provides matches inline, as you type, so that you can drop in a previously used and previously translated sentence. This software helps editors in the process of content transformation. After transformation, this software helps authors maximize reuse as they work on new content release cycles.

## Software Automation and Human Expertise Matrix

This table shows which steps of content transformation can be performed by software and which steps require human expertise. In some cases, input from software and humans can be used.

| Action | Software | Human Expertise |
|---|:---:|:---:|
| Locate content | ✔ | ✔ |
| Determine and build format-to-structure mapping | ✔ | ✔ |
| Convert paragraph styles and character formats to XML tags (if required) | ✔ | |
| Curate content | | ✔ |
| Identify duplicate content by words and phrases | ✔ | |
| Identify duplicate content by meaning | | ✔ |
| Revise content to create nimble, reusable topics | | ✔ |
| Ensure consistent terminology and style throughout all content | ✔ | ✔ |
| Revise topics to start strong, have meaningful titles, and focus on one idea | | ✔ |
| Consolidate duplicate content into a single reusable chunk | | ✔ |
| Apply metadata to improve search and retrieval | ✔ | ✔ |
| Work with SMEs for reviews and approvals | | ✔ |

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# Author Bios

**Val Swisher** is the Founder and CEO of Content Rules, Inc. Val enjoys helping companies solve complex content problems. She is a well-known expert in content strategy, structured authoring, global content, content development, and terminology management. Val believes content should be easy to read, cost-effective to create and translate, and efficient to manage. Her customers include industry giants such as Google, Cisco, Visa, Facebook, Microsoft, and Juniper Networks. She's the author of three books. Her latest is, "Global Content Strategy: A Primer," an introduction to creating and managing global content.
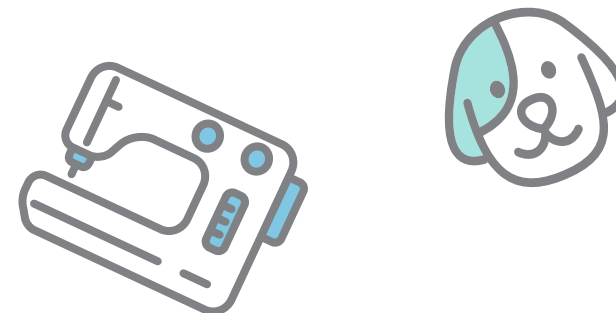
Val is on the Advisory Board for the Technical Communications Program at the University of North Texas. When not working with customers or students, Val can be found sitting behind her sewing machine working on her latest quilt. She also makes a mean hummus.

**Regina Lynn Preciado** is a senior content strategist with Content Rules. She helps companies transform how they organize, manage, and leverage content. Regina has helped organizations of all sizes make content work for people (instead of the other way around). Regina works with communicators in marketing, documentation, support, and training — sometimes all at once! Her clients include tier 1 companies in high-tech, life sciences, manufacturing, and financial services.

She lives a dogspotting lifestyle. Her professional goal is to work a picture of her dog into every presentation, in a seamless and logical way.

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