

# AEM Self-Serve Author Model

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# Agenda

- **Objective**
  - Why are we here?
- **Terminology**
  - Self-Serve Levels
- **Current State:**
  - Sections & Authors
  - Authors' Feedback
  - Demo
- **Future State:**
  - Criteria
  - Potential Self-Serve Areas
- **Next Steps**
- **Feedback & Questions**

# Meeting Objective

- **Common understanding:**
  - What is Self-Serve Authoring.
  - What areas on our website are Self-Serve today.
- **Use MMT as negotiates to gain agreement on:**
  - Criteria used to determine candidates for Self-Serve.
  - Potential future sections to consider utilizing Self-Serve Authoring (which will require further research.)

# Why are we here?

- Empower Business Owners to complete their work more efficiently.
  - Eliminate unnecessary steps and get changes made to the site faster.
  - Lots of Opportunity
    - **2,177** Workfront Projects Completed/In Process from Jan 2016 – March 2017 (15 months)
    - **1,022** are “Update Existing Web Page” (47%)
    - **23 Project Sponsors** requested 45% of all Projects (995 projects =>20 each)
- Agree what areas of the site could be good candidates to become Self-Serve to increase overall efficiency and which are not.
- Not here to make everything Self-Serve.

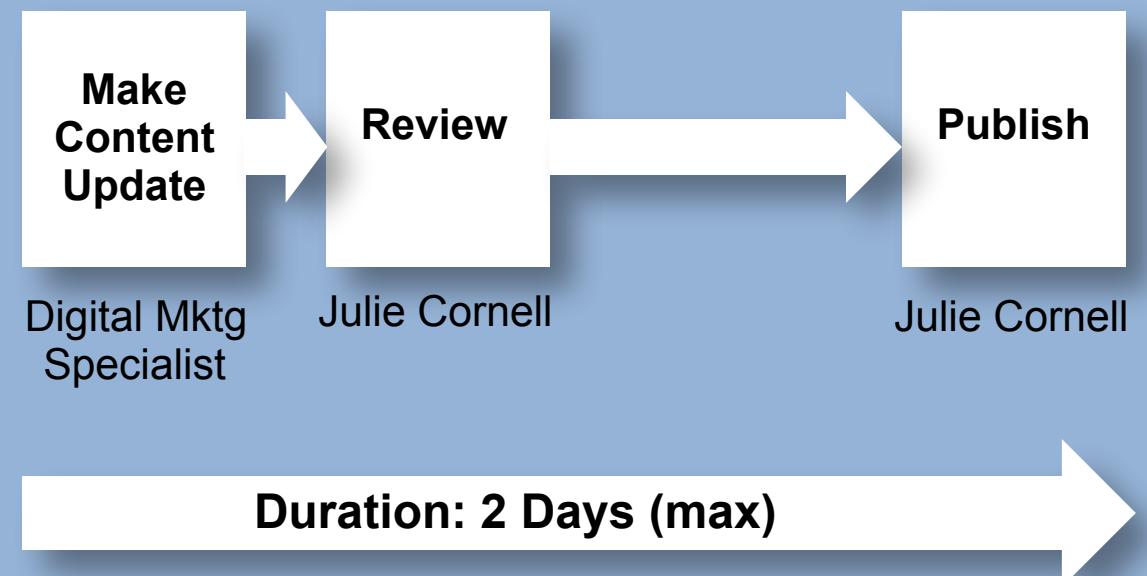
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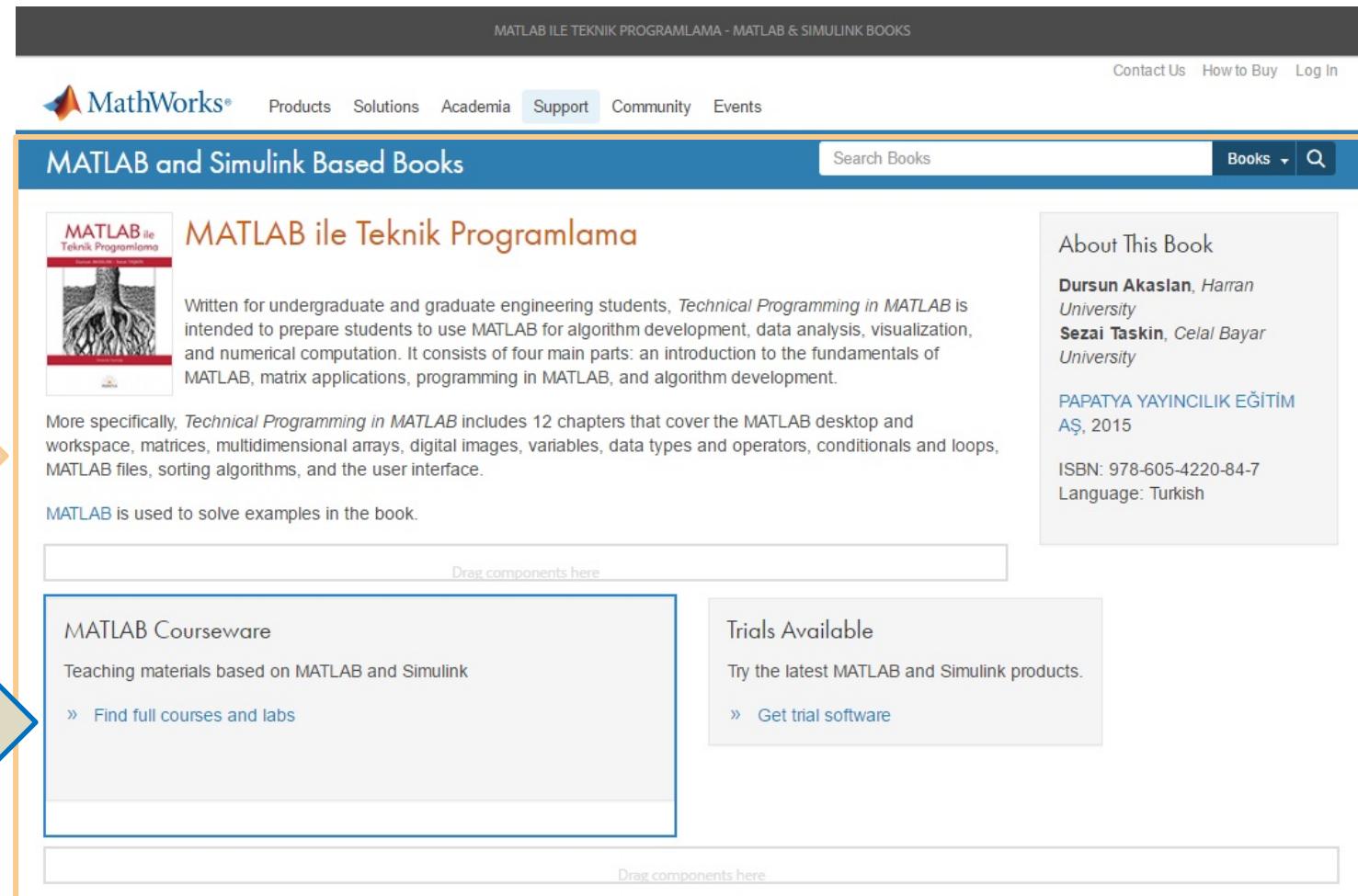


# Terminology

- **Adobe Experience Manager (AEM)**
  - AEM Sites (Web Pages)
  - AEM Assets (Images, PDFs...)
  - Components
  - Templates
  - Workflows

Template

Component



# Self-Serve Levels

- ***Level 1: Contributor***
  - Can only edit existing pages and upload/update assets, add metadata.
  - Cannot publish pages and assets.
  - Cannot delete pages.
    - More experienced authors will be reviewing the content to publish and/or delete.
- ***Level 2: Self-Serve Author***
  - Can create new pages and edit existing pages.
  - Can publish pages and assets.
  - Onward (offshore vendor) & WebOps Team members are available as an escalation point.

# Phased Approach

## Phase 1 Monitor Quality

- WebOps gives individuals “**Level 1: Contributor**” access and trains them.
- Contributors start updating content.
- More experienced authors review content for quality and publish.

## Phase 2

- If no quality issues during Phase 1, allow authors to create and publish pages.**
- WebOps meets with Business to gather requirements, design and develop template(s).
  - WebOps changes contributors access to “**Level 2: Self-Serve Author**” and trains them.
  - Self-Serve Authors start creating pages, updating and publishing content.
  - WebOps continue to monitor quality.

# Current Self-Serve Areas & Authors

Area	Users with Level 2: <b>Self-Serve Author</b> Access
Books	<i>Naomi Fernandes, Mikiko Hirano</i>
Connection	<i>Dana Wright, Gary Bourdon, Hikari Amano, Tina McKay</i>
Press Releases	<i>Deb Pacella, Sriya Kodial</i>
Training	<i>Elissa Petrelli, Melissa Berkov, Michael Abel, Rachael Tearle, Uday Kadaboina</i>
Technical Articles	<i>Alex Pollack, Linda Webb</i>
Recorded Webinars	<i>Andy Cedrone, Caitlin Howe, Sonja Kent, Molly Coyle (new hire)</i>
*Seminars and Webinars	<i>Andy Cedrone and a subset of the Mktg Operations Team including: Caitlin Howe, Mary Holland, Molly Coyle, Ryan Malone, Sonja Kent</i>  <i>*Note: This area is not in AEM currently, it is in Eloqua, but it's still self-serve. As part of the process Andy Cedrone still needs to make an update in AEM for the event listings.</i>
Tradeshows	<i>Andy Cedrone and a subset of the Mktg Operations Team including: Alle Perry, Francesca Habeeb, Kristen Wilkinson, Lauren Foisy, Nicole Accardi, Nicole Catatao</i>

## Self-Serve Authors' Feedback – Pluses

*Interviewees: Dana W., Alex P., Naomi F., Andy C., Katie A.*

- **Easy to use** – AEM is easy to use, intuitive and much better than the old CMS.
- **Provides control over turnaround time** – Being able to create and update pages on our own schedule is great, enables us to expedite the requests as needed.
- **Easy to monitor** – Ability to publish pages and assets ourselves vs. waiting for it to be done is more efficient and a lot easier to review and capture problems quickly.
- **WebOps did a great job!** – They were great! Continue to provide support and a dedicated escalation point of contact.

## Self-Serve Authors' Feedback – Deltas

*Interviewees: Dana W., Alex P., Naomi F., Andy C., Katie A.*

- **Difficult to search & find** – Difficult to search and find content in AEM compared to the old CMS.
- **Minor bugs increase overall time spent** – Minor issues add up and increase overall time spent to create and update pages in AEM.
- **Change of workflow and loss of existing automated functionality** – Some workflow steps were done automatically in the old CMS and now they are being done manually in AEM.

# Demo

by *Ryan Tremblay*  
(5-10 min.)  
[Demo Page](#)

## Level 1: Contributor Training

### ***AEM Sites Walkthrough (30 min)***

- How to Find a Page (via Taxonomy and Search)
- How to Edit a Page
- How to Add/Edit Basic AEM Components
- How to View and Edit Page Properties
- How to Send a Page URL to Business Owners for Review

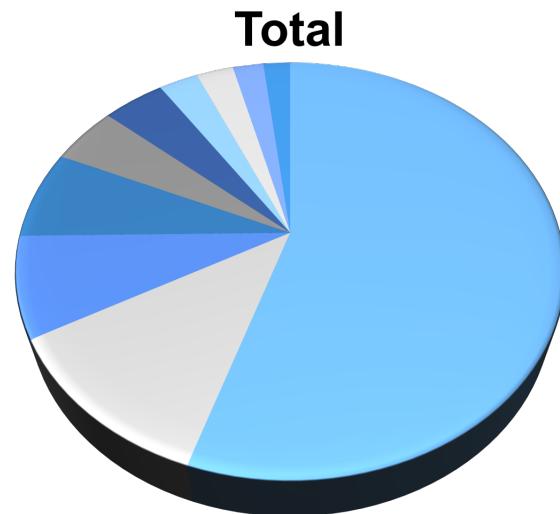
### ***AEM Assets Walkthrough (30 min)***

- AEM Assets UI, Switching Views and Navigation
- How to Search and Edit an Asset
- How to Upload an Asset
- How to View and Edit Asset Properties
- How to Send an Asset URL to Business Owners for Review

# Criteria for Self-Serve Eligibility

Criteria	Measure
<b>1. Frequently Requested</b>	✓ Frequency of total number of projects/ per quarter is equal or greater than 10
<b>2. Non-Complex</b>	<ul style="list-style-type: none"><li>✓ Min. page/asset URL change</li><li>✓ Min. page/asset deletion</li><li>✓ Min. redirect setup</li><li>✓ No query run</li><li>✓ No translation</li><li>✓ No updates to translated content</li><li>✓ Structured page layout</li></ul>
<b>3. Min. Involvement of Multiple Groups</b> OR other groups work is completed prior to AEM page update	<ul style="list-style-type: none"><li>✓ Min. approval other than sponsor</li><li>✓ No legal review</li><li>✓ No design/UX</li></ul>
<b>4. Increased Efficiency</b>	<ul style="list-style-type: none"><li>✓ Less time spent updating content than creating and managing Workfront projects</li><li>✓ Easier for SME to make content updates</li><li>✓ The content is generated in local offices by native speakers</li></ul>
<b>5. Min. Number of Authors</b>	<ul style="list-style-type: none"><li>✓ The total number of authors is equal or less than 5</li></ul>
<b>6. Business is interested</b>	<ul style="list-style-type: none"><li>✓ Business shows interest for their area to become self-serve</li></ul>

# Project Type Frequency: Top 10 Workfront Project Requests by Project Types



- Web Page - Update Existing
- New Video: Demo
- Web Page - Create New
- Discovery Page - New or Update Existing
- PPC Landing Page - New or Update Existing
- Hardware Support Pages - New or Update Existing
- User Story
- Technical Article
- New Video: General
- URL Redirect

Project Types	Total
#1 Web Page – Update Existing	1022
#2 New Video: Demo	221
#3 Web Page – Create New	144
#4 Discovery Page – New/Update Existing	128
#5 PPC Landing Page – New/Update Existing	86
#6 HS Pages – New/Update Existing	80
#7 User Story	51
#8 Technical Article	48
#9 New Video: General	40
#10 URL Redirect	35

# Project Frequency: Top 10 Workfront Project Requests by Project Sponsors



Project Sponsor	Total
#1 Catherine Devine – Policies & Guidelines - Patents	232
#2 Linda Webb – Conf. Papers, News & Notes, Newsletter/Digest, Tech. Articles	82
#3 Phil Massano – Discovery, Offer Landing, PPC Landing	64
#4 Sarah Steele – Student Competitions	59
#5 Melissa Berkov – TAH Portals	54
#6 Alan Poon – User Story	49
#7 Steve Miller – Product Release, New Video: Demo, Product	44
#8 Jack Erickson – HS, New Videos: Demo, Prod., Prod. Overview, Discovery	33
#9 Doreen Gifford – Consulting, Spotlight	32
#10 Shwetha Mallikarju – HS, New Video: Demo, Product	32

# Potential Future Self-Serve Areas

Priority	In Process Self-Serve Areas	AEM Page Template	Targeted Start	Level 1 Contributor	Level 2 Self-Serve Author	Status
#1	TAH Portals	July	Aug.	Yes	No	<i>Template Design - In Process</i>
#2	Seminars and Webinars	July	Aug.	Yes	Yes	<i>Moving to AEM - In Process</i>
#3	PPC and Discovery Pages	July	Aug.	Yes	Yes, later	<i>Template Design Needed – July 22</i>
#4	Student Competitions	TBD	TBD	Yes	No	<i>Training - July 14</i>
Priority	Candidates for Future Self-Serve – Requires further research	AEM Page Template	Targeted Start	Level 1 Contributor	Level 2 Self-Serve Author	Criteria Considerations
#1	Legal Patents Page	NA	TBD	Yes	No	
#2	Hardware Detailed Pages	Templated	TBD	Yes	No	<i>Business Interest TBD</i>
#3	Media Coverage	TBD	TBD	Yes	No	<i>Business Interest TBD</i>
#4	Consulting	Aug.	TBD	Yes	No	
#5	User Stories	Templated	TBD	Yes	No	<i>No Business Interest</i>
#6	Product Main, Features, What's New	TBD	TBD	Yes	No	<i>Less Frequency, Many Authors, Inefficient, Maybe Complex</i>
#7	Product Video Pages, Webinar Page, Code Examples	TBD	TBD	Yes	No	<i>Less Frequency, Many Authors, Inefficient, Maybe Complex</i>
#8	Solution Pages	TBD	TBD	Yes	No	<i>Less Frequency, Many Authors, Inefficient, Maybe Complex, No Business Interest</i>

# Next Steps

- Continue with 'In Process' site-sections.
- Gather feedback from MMT:
  - Evaluate proposed candidate site-sections
  - Research additional site-sections based on feedback
  - Meet with Business Owners

# Feedback & Questions

1. *Criteria*
2. *Future Self-serve areas*
3. *Next Steps*