CASE STUDY

Content Lifecycle Management

Background

The subject of this case study is an internal-facing designer working for a large financial and insurance provider. That company responsibility is creating online learning content for employees, and managing the lifecycle of that content. The company uses a Learning Management System (LMS) with an attached authoring software and online collaboration solutions such as Customer Relationship Management (CRM) and Human Resource Management (HRM) tools.

Problem

Large and distributed enterprises face significant challenges in managing the content lifecycle effectively. The existing content creation, review, training, and management processes are fragmented, leading to inefficiencies and errors in content delivery. The need to streamline these processes and ensure compliance with regulations is critical for maintaining competitiveness in the industry. Key issues include:

Fragmented Content Creation
Different teams use various tools and processes across different stages (SME, Review, Published). The current system requires manual updates, increasing the risk of inconsistencies.

Inefficient Review and Approval Processes
Multiple stakeholders involved in content creation making it difficult to consolidate input and track progress.

Limited Training and Development Environments
The organization lacks the dedicated development and PreProduct environments, preventing smooth parallel testing (UAT) and extensive content deployments.

Visibility and Status Identification Issues
Difficulty in quickly identifying the current status of content (i.e., in review, or pending approval, leading to confusion and inefficiencies.

Manual and Error-Prone Tasks
The lagging system requires manual updates, increasing the risk of checkbox/form and routing errors, delayed synchronization.

Lack of Centralized Data Management
The absence of a centralized system for managing content data results in scattered information, making it difficult to track and manage content effectively. There is an urgent need for automated, rules-backing mechanisms, and an improved review workflow to enhance the efficiency of content management.

Process

Persona

Lee is an instructional designer for a large financial and insurance provider. Most of his day is spent creating online learning content for employees, and managing the lifecycle of that content using the company's LMS platform.

Motivation
His motivation is to help our employees be more productive and successful in their day-to-day job.

Goals
My main goal when using digital adoption platform is to improve the user experience of our employees when using their day-to-day work and learning.

Behavior and Knowledge
- Lee is experienced in using Articulate 360 in creating, deploying and maintaining content.
- Lee accumulated his knowledge in the tools through years of practice.

Needs
- Expanding the lifecycle process is not an option for me. But there are no easy ways to do it. Maintaining spreadsheets and manual updates are time-consuming and prone to human error, making it challenging.
- I want to make sure the right people are in the right place.

User Journey

Stage
Discovery
Onboarding
Daily Use
Content Creation
Review & Approval
Deployment
Ongoing Maintenance
Touchpoints
Email notifications
Slack channel
LMS platform
Articulate 360
Review tools
Slack channel
Email notifications
Dashboard
Emotion
Curious but cautious
Confident
Frustrated
Focused
Relieved
Satisfied
Pain Points
Time-consuming manual updates
Lack of visibility into content status
Delayed synchronization
Manual routing errors
Lack of visibility into content status
Time-consuming manual updates
Lack of visibility into content status
Time-consuming manual updates
Lack of visibility into content status
Time-consuming manual updates
Lack of visibility into content status
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Opportunities
Automated reminders and guided onboarding
Centralized dashboard for content status
Automated synchronization
Automated routing and notifications