

Content Production Vision

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Agenda



- Discovery phase explanation and process.
- Critical issues identified.
- Solutions and action-items outlined.
- Measuring success.

Discovery

Critical issues



- What is the current workflow of each media type?
- Which tools are used to create, review, publish and assess content?
- Has explicit, repeatable process been designed and implemented?
- What is being done manually versus what can be automated?

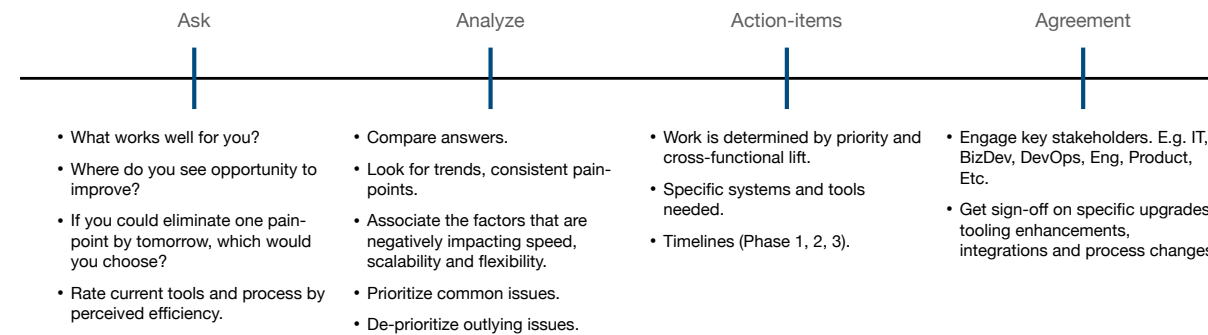
-The first thing to understand is how each contributor crafts their content and assets. Based on the specific deliverable each person creates, how does it currently get from conception, to distribution and who is doing “what” at each step?

-Next is to outline of all the current software tools, both internal and third-party, that are utilized to create content and assets.

-Next, what does process look like for each team? Is collaboration being supported in a way that aligns with the company’s goals for employee experience? Is there consistency in the current process for content production or not, and why is process not easily repeated, if so?

-Finally, it’s always important to understand where current process is stuck with inefficient, manual tasks, and whether scalable automations can be used instead.

Discovery Process



-Here's how I would go about diving into answering our critical, high-level questions about workflow, tooling, and process from our previous slide. I would spend 30-minutes with every member of the Content Production Organization to understand their specific, individual areas of concern.

-Their answers would then need to be analyzed with the trends and consistent critical issues being aggregated together. It might be beneficial to tag issues based on whether they affect speed, scaling and flexibility. Priority is then assigned to each critical-issue while one-off and outlying issues are De-prioritized... Not forgotten though :-)

-Specific action-items can then be determined, this could become very specific such as new software features for the CMS tool, API integrations with commonly used third-parties, or asset management functions for better oversight of the production process. The main thing here is to create real, actionable work, specify the needs and create a 3-phase roadmap to implement them.

-Finally, the action-items are presented to the key stakeholders across the relevant teams. It will be important to get sign-off on new work and process change from IT, DevOps, Engineering, Content leads and PMO, at a minimum.

Analyze → Action-items

- Let's now assume Vital has provided all the inputs for our "Ask" phase, we've analyzed the data and aggregated the common critical issues into 3 buckets that can be addressed with action-items.
- The 3 buckets our issues fall into are **Collaboration**, **Integration** and **Process**.
- I'll outline each of these and include my proposed solutions.

Critical issues

Collaboration



- Content creators have unique tools and needs.
- The review of content deliverables is clunky and siloed.
- Assets from other teams are not always easy to find.

-Video teams use Premiere, Audio teams use Pro Tools, Instructional Designers use Storyline, Image teams use Photoshop, Copywriters use Upwork(Just kidding...). In seriousness though, each piece of media requires unique tools which creates individual workflows, file-format constraints and inhibits cross-functional collaboration.

-Some teams have adopted using JIRA to organize work while others are using Quip docs and still others rely mainly on Email threads. This can make it very tough for senior leadership to see statuses of specific media as they progress towards a final, multi-media deliverable. Reviewing and providing feedback on assets as they develop is clunky for most teams and done in silos.

-The Instructional Designers needed some original graphics from the Image team for a new employee training module. The Image team emailed instructions on how to locate the files in the Box folders. The ID Lead follows the instructions but halfway through gets stuck with a “You’re not authorized to access this folder” message. The ID Lead reaches out to the Image team again who says they cannot change the permissions and that they should ask the IT team for access. What should’ve taken minutes is now taking until the end of the day.

Critical issues

Integration



- Many third-party products do not play well with the current CMS.
- User roles and permissions are not centralized.
- No analytics, insights or metrics.

-When different media files are being worked on in their respective software tools, the CMS has little to no understanding of what's going on. Only when something is ready for publishing does it get uploaded into the CMS.

-Managers are determining individual contributor access and permission levels across all tools and systems on the fly. This means access failures occur frequently which slows everything down.

-Since our solutions are for the Learning & Development group, the content is often supporting educational, informational, and engagement goals related to the employees. There's a real need to understand whether the produced content is having the intended impact on end-users.

Critical issues

Process



- Each team follows their own process for getting work done.
- Communication streams are discretionary.
- No knowledge base for content production.

-Some teams host daily stand-up meetings to align on current tasks while others have weekly meetings, some Leads and Managers review work being done daily while others only want to review near-final versions before adding feedback. Senior leadership must go to Team Leads and Managers for simple pulse-checks of various content deliverables.

-Content production requires a lot of communication between many individuals and each team uses their own preferred tool for communication. This causes other teams to have to maintain a general understanding of how best they should get in touch with a particular team member when they need status updates or have questions. Sometimes these questions are left unanswered for hours or days because they were sent in an Email, and the recipient doesn't commonly look at emails, they prefer Slack.

-There's currently no established process for documentation between content teams and the content production organization. Some individuals have created cheatsheets and instruction guides for various tasks but these are not centralized. Style guides exist in Manager's heads and information sharing is reactive not proactive.

Action-items

-Now the fun part. Let's solve all these critical issues related to **Collaboration**, **Integrations** and **Process**.

Action-items

Solutions for collaboration



Content creators have unique tools and needs.

Most creative softwares offer APIs to make your specific workflow and tools more collaborative. We can more tightly couple the existing Digital Asset Manager (DAM) with each piece of software, create flags based on user behavior which notify other users and ensure everyone is made aware of the deliverables as they progress to completion.



Phase 1

Align with IT, DevOps, Engineering teams on specific API viability, InfoSec compliance, etc. Confirm with Content teams how each API will function.

Phase 2

Begin integration of API functionality with DAM/CMS tool. How-to documentation, testing with QA team possible but not mandatory.

Phase 3

Training team members on new flagging functionality, new DAM features. Complete rollout to content teams. Continuous testing of functionality.

Action-items

Solutions for collaboration



The review of content deliverables is clunky and siloed.

Every team should use JIRA going forward for task management and tracking. It is a very customizable and user-friendly product that will allow everyone to see statuses, blockers and future work.



Phase 1

Ensure JIRA is accessible by all content team members. Create team environments in the tool, design "sprints", ticket workflows.

Phase 2

Build-out required form-fields for each team's content ticket type. Confirm that cross-functional leads are able to view every other team's JIRA board. Finish user testing and training.

Phase 3

All content team members using JIRA for task management exclusively. Ongoing testing and ticket customization.

Action-items

Solutions for collaboration



Assets from other teams are not always easy to find.

Along with specific updates to process and integrations, every team's Individual Contributors will have read-only access to every other team's asset files. Team Leads will have read-only and download privileges for everything in the DAM. The DAM is the source of truth for every asset across every team.



Phase 1

Align with Engineering on crafting a robust asset hierarchy structure within the DAM, IT to provide appropriate access to Team Leads and ICs. Begin eliminating Box as the source of truth for asset file structure and organization.

Phase 2

Box no longer used beyond local file management. The DAM should allow for navigating all file format types in the proposed manner, beta tests with team leads. Begin documenting instructions for asset management best practices.

Phase 3

All relevant access for teams should be granted (read-only, read-only+download). Beta tests concluded. Additional tweaks proposed for future work. Documentation and best practices reviewed and accessible by all teams.

Action-items

Solutions for integration



Many third-party products do not play well with the current CMS.

Some aspects of this will be covered by previously mentioned DAM improvements. The CMS is the main point of publishing finished work and the overall vision of a particular finished deliverable should be integrated and present there. I propose building templates which include placeholders of each media type that link directly to the DAM and allow for real-time linking/tracking of work in the context of the final deliverable. This could also be a link between the CMS and JIRA.



Phase 1

Explore the customization possibilities of linking events between the DAM, its assets, and the CMS where finished deliverables are organized and published. Possible Engineering lift at this point.

Phase 2

With technical lift understood, build-out content templates where asset-types (video, imagery, eLearning modules, etc.) are represented as a placeholder and status info propagates from the DAM/JIRA into the template. Testing.

Phase 3

Testing of template and event handling functionality is completed in the CMS. Documentation of building content with templates and publishing. Ensure team members understand the functionality.

Action-items

Solutions for integration



User roles and permissions are not centralized.

I believe we can execute a “set it and forget it” approach to this issue. While responding to access requests and user permission changes on the fly is not unreasonable, it can become a headache when many third-party applications and outside softwares are being used. Waiting a few hours for IT to provide access adds up to a lot of wasted productivity across dozens of employees.



Phase 1

Work with IT and DevOps to structure an XML or JSON user permissions file. Scope the feasibility of implementation, can all third-party apps understand this script? Is a gateway needed?

Phase 2

Working with Content Leads or Managers, create individual user profiles for the Phase 1 script. E.g. Copywriter = {tool: Microsoft word, access-level: administrator}{tool: JIRA, access-level: create, read, update, delete}.

Phase 3

Test functionality of script confirming each key-value item executes as expected and access to specific tools occurs. Ensure all Managers understand how to build permission files for each team member and new members, documentation creation.

Action-items

Solutions for integration



No analytics, insights or metrics.

JIRA will provide a lot of insight into the work being done and its efficiency.



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Action-items

Solutions for Process



Each team follows their own process for getting work done.

Content sprints can help simplify and structure the production process. Daily standup meetings should be encouraged and using JIRA, we can begin to implement weekly content sprint planning and alternating sprint backlog meetings.



Phase 1

With a coherent JIRA setup for each team. Begin to introduce Agile methodologies for content production. Get feedback, questions and buy-in.

Phase 2

Align each team on a weekly or bi-weekly sprint schedule. Include a 30-minute to 1-hour sprint planning meeting each week with an alternating backlog meeting for bi-weekly formats. If a weekly sprint is more conducive to the team, sprint planning and backlog grooming should take place weekly.

Phase 3

All content teams should be following their respective content sprint formats. Team Leads or project managers should run sprint planning and backlog grooming meetings. Tickets are prioritized and distributed to team members for execution.

Action-items

Solutions for Process



Communication streams are discretionary.

Consistent communication is very important for everyone. When comms are spread across different mediums, it creates factors in the process. I propose a comprehensive rollout of Slack for all content production communications. It's user-friendly but includes one of the most robust interfaces for streamlining process and integrating with other tools.



Phase 1

Scope all relevant third-party integrations with Slack. Align with IT and DevOps on implementation. Create relevant onboarding process for new users.

Phase 2

Deploy priority integrations to Slack. Encourage Managers to build team channels for various categories.

Phase 3

All production work is being aligned on and discussed in Slack. Integrations are tested and functioning as expected. Team channels are visible to relevant members. Leadership is able to pulse-check production processes as well.

Action-items

Solutions for Process



No knowledge base for content production.

Documentation is an important part of developing an effective and scalable Content Production team. While some things are more important to document than others, encouraging teams to craft relevant instructions, style guides, how-tos, etc. will help onboarding of future team members, and also ensure we are recalling where we've been. All of this is best accomplished using Confluence, which tightly integrates with Slack and JIRA too.



Phase 1

Ensure we can implement Confluence across the organization. IT and DevOps to consult. Begin crafting environments and relevant user roles within the Confluence program.

Phase 2

Each team Lead should determine a documentation hierarchy that suits their specific group. Documentation existing in outside software or other tools should begin to be migrated into Confluence. Templates should be created for new documents.

Phase 3

All users are able to access, share, and create documentation successfully. Templates are thorough and cohesive. New users are more easily onboarded being able to navigate a centralized repository of resources.

Measuring success

Measuring success



- Ask the users.
- JIRA Metrics.
- Testim projects.

-With all solutions implemented, it will be important to routinely followup with key users and team Leads to confirm what's working better or what may still need to be tweaked. Since our users are internal, this can be accomplished with some simple interview questions or a survey.

-Reviewing the effectiveness of content sprints and time taken to complete tasks can be done easily with JIRA. When certain fields of each ticket are configured appropriately, JIRA will analyze the “lift” of a specific task, verify how long it took within each phase and provide a nice dashboard displaying overall efficiency of the various content teams.

-Testim is a great tool for automation tasks and software testing. I can't say it's the perfect tool and it could not replace solid QA team members, but it can quickly identify issues with repeatable tasks when updates or changes are made to code or other components of a system. Testim would help to keep our CMS tool operating correctly and ensure any unique integrations are maintained when other updates or changes are made that connect to them.