

Content Operations: Discovery and Planning for Wolters Kluwer ELM

April, 2019

Day 1

9:00 AM - 4:30 PM

Lunch at 12

Breaks at logical points

Topic

- Intros & Overview of methodology for the next 2 days
- Map Plan phase current state: teams, tools, outcomes
- Map Produce phase current state: teams, tools, outcomes
- Map Distribute phase current state: teams, tools, outcomes
- Map Analyze phase current state: teams, tools, outcomes
- Review assessment output - Review survey results, validate, and dig into areas of opportunity
- Define the vision & goals for content operations at Wolters Kluwer ELM
- Define roadmap efforts for:
 - Technology needs (integration, retirement, consolidation)
 - Use cases (i.e., new teams, new content types)
 - Maturity / change enablement
- Roadmap prioritization exercise: prioritize defined efforts by business value and ability to execute
- Review and finalize prioritized roadmap
- *Time allowing, we'll start the Business Readiness planning to enable change*

Agenda

Day 2	Topic
9:00 AM - 3:30 PM Lunch at 12 Breaks at logical points	<ul style="list-style-type: none">● Kapost demo & terminology overview● Define strategic taxonomy● Define content types and their workflows● Define initiative types and workflows ● Wrap up and next steps

Scope for This Phase

- 16 Planner/contributor licenses
- 55 Consumer licenses
- **Use cases:**
 - Establish processes for content production and collaboration via Studio
 - Sales enablement via Gallery app for Salesforce
- Professional Services
 - Content Operations Discovery and Planning workshop
 - Content Operations Workflow and Taxonomy workshop
 - Configure Kapost and test
 - Connect pre-built integrations
 - Migrate up to 500 assets into Kapost
 - Train users
 - Configure Gallery and train users

What you can expect after this week

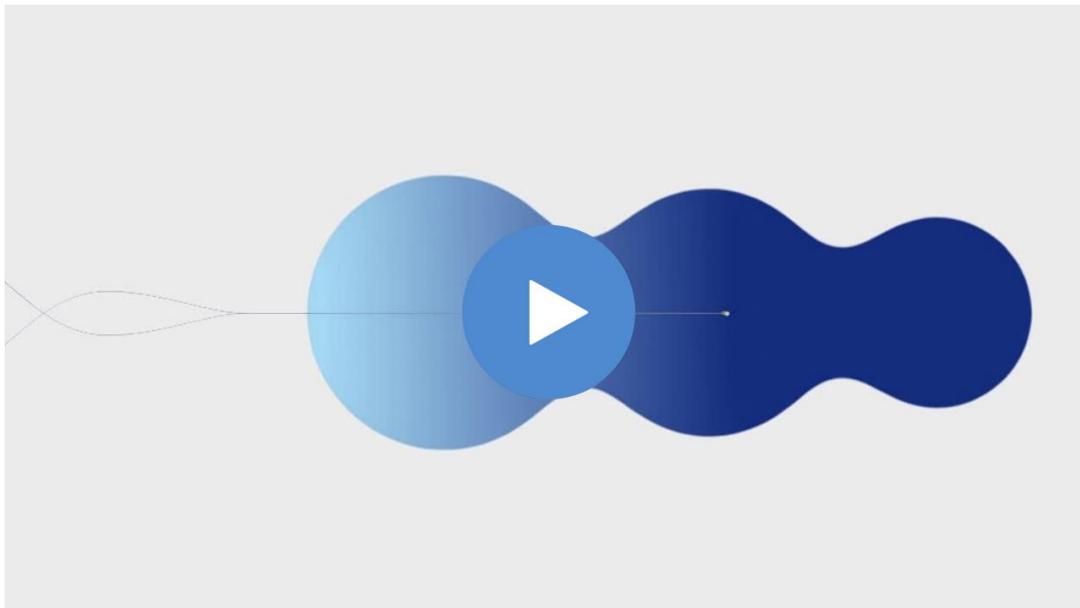
Outcomes

1. **Vision** for content operations at Wolters Kluwer ELM
2. **Program roadmap** with prioritized efforts around use cases, technical integrations, change management and maturity efforts
3. Documented **configuration settings**
4. **Configured** Kapost platform
5. User **training**

Our Approach to Your Content Operations Maturity



Content Operation Overview



Mapping teams, tools, and outcomes

To make sure we're all singing from the same sheet of music.

Four Phases of the Content Lifecycle



Different Levels of Activity Happening

	Plan	Produce	Distribute	Analyze
Governance				
Orchestration				
Execution				

A Look Inside the Content Operation

	Plan	Produce	Distribute	Analyze
Governance	Align themes and budget with strategy	Green-light execution & manage escalations	Ensure alignment to strategy and targets	Assess returns on strategy and tactics to inform planning
Orchestration	Orchestrate integrated planning	Provide visibility and coordination across teams	Compile and personalize journeys	Assess operational health
Execution	Build asset level plans	Create and contextualize content at scale	Publish and amplify	Analyze performance

Customer-Centric Strategy | Strategic Taxonomy | Integrated MarTech Stack

Jobs to Be Done - Plan

- **Decide on cross-functional campaigns:** synthesize inputs, weigh competing priorities, and choose the most effective campaigns
- **Allocate marketing budget:** allocate budget resources to campaigns/programs/initiatives for greatest business impact and ROI
- **Develop integrated campaign plans:** design cohesive campaigns/programs/initiatives that embody our marketing strategy and resonate with our audience
- **Visualize, cross-examine, and communicate:** see what we are planning, identify and fill gaps, and disseminate plans to all teams
- **Listen to the front lines:** compile meaningful insights into content's past performance to prioritize ideas and requests
- **Develop supporting asset plans:** lay out pieces of content that will best support campaigns



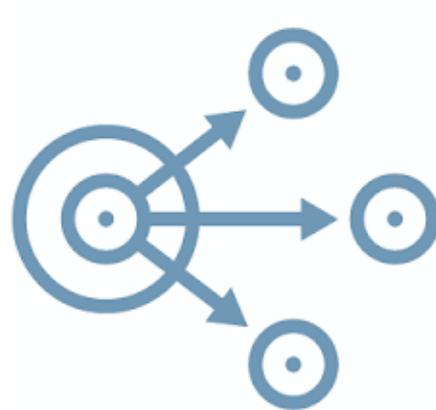
Jobs to Be Done - Produce

- **Coordinate limited production resources:** visualize the work we need to do, assign teams to activities, and coordinate dependencies across teams, regions, and skill sets
- **Avoid strategic drift with process governance:** manage approval processes for campaigns and content and address ad hoc requests/content changes to avoid strategic drift
- **Contextualize content at scale:** reuse, repurpose, localize, and contextualize content to create more tailored content at scale
- **Ensure visibility upstream and down:** communicate campaign and content status and launch dates to all teams and key stakeholders
- **Manage brand and message consistency:** operationalize a consistent brand identity, value position, and compliance with standards, key themes, and usage rights
- **Operate smoothly and predictably:** manage content creation tasks, approvals, digital assets, communication, status, and assign the appropriate creative resources



Jobs to Be Done - Distribute

- **Manage influencer, earned, and owned communication:** leverage aligned messaging to grow awareness via social influencers, the press, and corporate/investor communications
- **Use paid channels to target the right audience:** better target and amplify our message through paid social, advertising, and partner promotions
- **Enable person-to-person channels:** enable internal and external teams, like sales and channel partners, ensuring they have access to our most effective content
- **Personalize each experience:** leverage data and digital body language to build customer profiles and serve up personalized content
- **Deliver compelling and unique digital experiences:** create authentic, effective, and innovative digital experiences
- **Deliver effective in-person experiences:** make the most of investments in events and trade shows



Jobs to Be Done - Analyze

- **Demonstrate return on content:** understand and interpret performance, usage, and scoring data to quantify revenue impact
- **Develop and communicate recommendations:** synthesize and communicate recommendations to address gaps and opportunities in our content strategy and coverage
- **Evaluate message alignment and consistency:** understand the level of alignment and consistency across all of content
- **Evaluate operational effectiveness:** identify opportunities to improve the efficiency, reliability, and health of the content operation
- **Assess content performance:** understand the performance of our content and particular channels
- **Manage the lifecycle of content:** assess our content inventory (with a centralized repository) so that we know when to make timely updates or to archive dated content



Content Operations Maturity Assessment Results

Because who doesn't love more data.

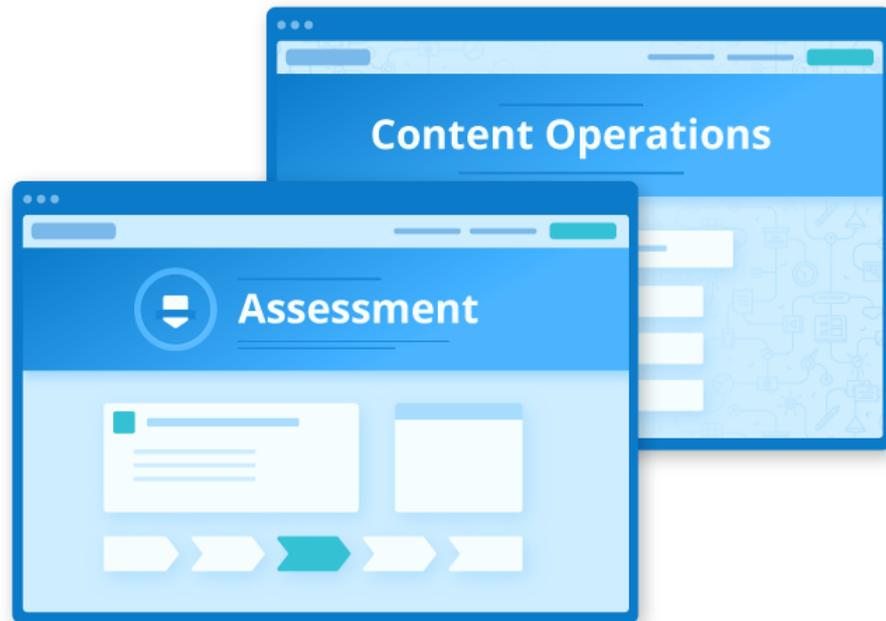
Overview

Survey Completed: February 27 - March 19, 2019

The 3 respondents represented these roles:

- Content creator / editor
- Content operations council
- Marketing communications and events

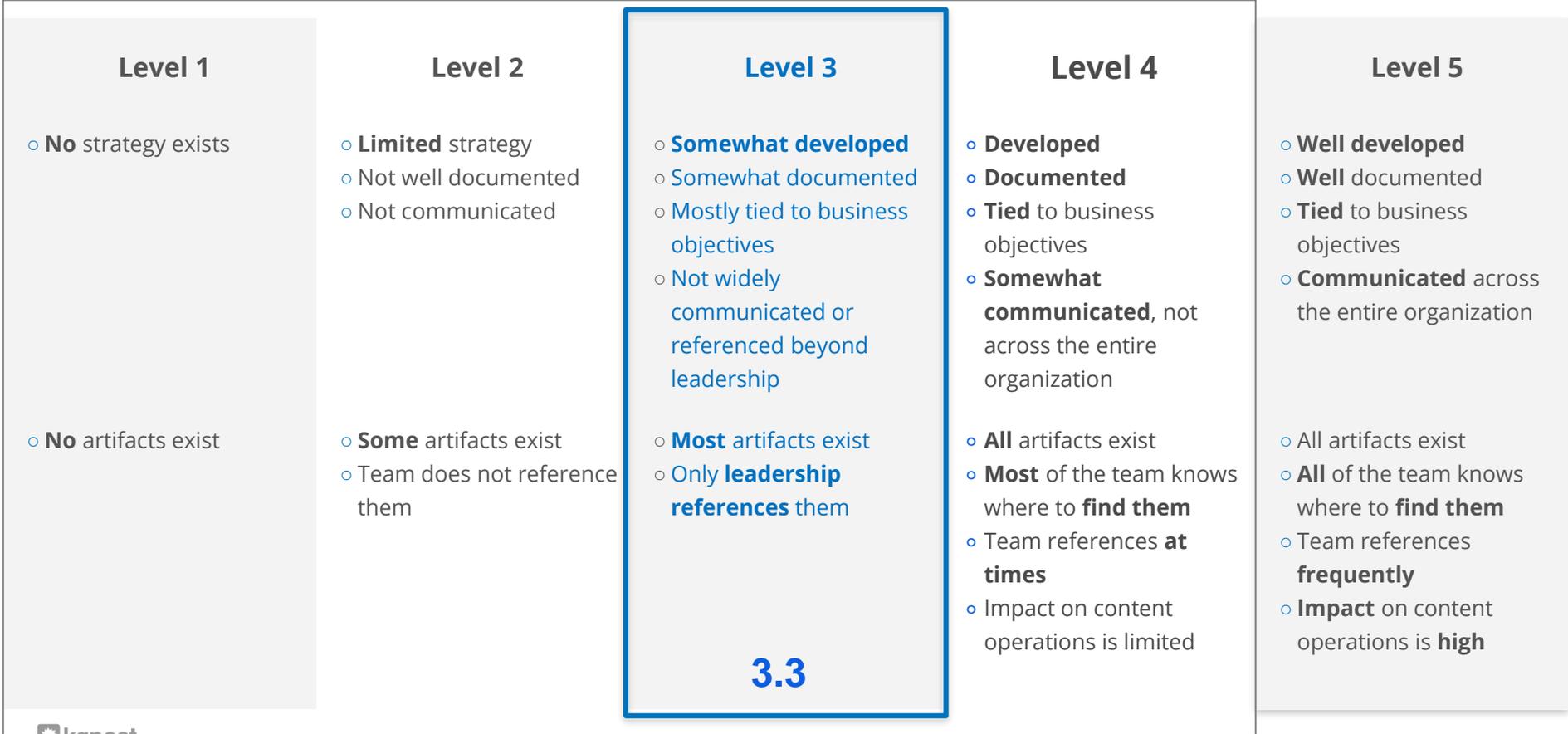
35 questions based on Jobs to Be Done in a content operation



Content Ops Maturity: Foundational Elements

The strategic direction, tools, functions and processes that inform and guide an effective Content Operation.

Customer Centric Strategy



Strategic Taxonomy

Level 1

- No strategic taxonomy

Level 2

- Strategic taxonomy **for my team**
- Not aligned to other teams

Level 3

- **Multiple strategic taxonomies across most teams and tools**
- No central governing body to manage it

2.7

Level 4

- **Unified strategic taxonomy** across most teams and tools
- **Central governing body** to manage it
- Data cleanup required prior to producing reports for leadership

Level 5

- Unified strategic taxonomy across most teams and tools
- **Central governing body** to manage it
- **Data across tools is consistent** so we can easily produce reports for leadership

Integrated Martech Stack

Level 1

- **No** key tools are integrated via pre-built integrations

Level 2

- **Some** key tools are integrated via pre-built integrations
- No one assigned to manage integrations

Level 3

- Some key tools are integrated via pre-built integrations
- At least **one system admin** to maintain integrations

3.0

Level 4

- Some of the key tools are integrated via **custom integrations**
- At least one system admin to maintain integrations
- No one assigned to manage cross-tool analytics

Level 5

- Some key tools are integrated via custom integrations
- At least one system admin to maintain integrations
- I **trust** our cross tool **analytics**
- Process to **prioritize new tool** integrations

Recommendations

- Align global taxonomy across teams and tools to support a content operation
 - Identify an owner for taxonomy across teams
 - Conduct a taxonomy audit across tools and teams
 - Implement global taxonomy across tools and teams
 - Train and enable teams to use new global taxonomy
 - Enforce taxonomy governance, including updates to taxonomy and utilization

Plan

Decide who we should target and how. Operationalize content strategy and ensure each asset is aligned to core themes, personas, and business objectives.

Align Themes With Budget & Strategy



Orchestrate Integrated Planning

Level 1

- **Don't** have a content roadmap
- Business objectives are defined
- **No visibility** into progress against objectives

Level 2

- **Short term plan** but no formal content roadmap
- Business objectives are defined
- Leadership **communicates progress** against objectives

Level 3

- Formal content roadmap (**3-6 months**)
- **Followed by some teams**
- Business objectives are defined and **visible to all**
- Leadership **communicates progress** against objectives

2.8

Level 4

- Formal content roadmap (**12 months**)
- **Followed by all teams** and **updated** as necessary
- Business objectives are defined and visible to all
- **All marketers see progress** against objectives in a **manually** updated tool

Level 5

- Formal content roadmap (**18 months**)
- Followed by all teams and updated as necessary
- Business objectives are defined and visible to all
- All marketers see progress against objectives in a **dynamically** updated tool

Build Asset Level Plans MOVE TO 2

Level 1

- Do not solicit feedback from stakeholders outside of marketing
- No content production plan when our organization makes decisions on programs

Level 2

- Informally solicit feedback from stakeholders outside of marketing
- Team managers make rough estimate of content production resource needs to inform our decisions on programs

Level 3

- Formally solicit feedback from stakeholders outside of marketing when planning major themes
- Team managers make detailed estimate of content production resource needs to inform our decisions on programs

2.9

Level 4

- Formally solicit feedback on the roadmap/past success from stakeholders outside of marketing
- Content production plans are standardized, incorporate cross-team and temporal resource dependencies
- Plans are manually updated

Level 5

- Formally solicit feedback on the roadmap/past success from stakeholders outside of marketing
- Process to solicit ongoing content ideas and give status feedback
- Content production plans are standardized, incorporate cross-team and temporal resource dependencies
- Plans are automatically updated

Recommendations

- Solicit content ideas from stakeholders outside of marketing (i.e. sales, partner management)
 - Utilize Kapost Ideas to capture content ideas from non-marketers
 - Establish process and governance gates for ideas
 - Communicate process and location to stakeholders

Produce

Collaboratively and efficiently create full-funnel marketing content that resonates deeply with targets.

Green-light Execution & Manage Escalations

Level 1

- **No clearly defined** content request **policies**
- Take all ad hoc requests as we get them
- No standardized workflows for content
- Approvals are often ad hoc by team

Level 2

- No clearly defined content request policies
- Take ad hoc **requests when we have extra time**
- **Documented requirements** for final and legal **approvals**
- No system of governance to track approvals

2.2

Level 3

- **Informal** content request **policy**
- All ad hoc **requests escalated** to management
- **Standardized workflows** for content production - don't always follow
- No system of governance to track workflows

Level 4

- **Formal** content request policy - usually adhere to the policy
- Standardized workflows for content production - **always followed**
- **System of governance** to track workflows

Level 5

- **Formal** content request policy - **always adhere** to the policy
- **Re-prioritize content plans** if request meets certain requirements
- Standardized workflows for content production - always followed
- System of governance to track workflows
- **Measure** compliance and cycle times to improve

Provide Visibility & Coordination Across Teams

Level 1

- **Duplicate content efforts** instead of repurposing existing content
- Don't have a consistent way to communicate content status to stakeholders
- Each team has different methods to manage content production

Level 2

- **Occasionally repurpose content within a program**
- Use periodic meetings and **manually updated tools to communicate content status**
- Stakeholders outside of marketing don't have access to the manual tool
- **Some teams use tools to manage content production**
- Often surprised by the teams that use different tools

2.0

Level 3

- **Usually create pillar content** then break out pieces to repurpose within that program
- Use periodic meetings and manually updated tools to communicate content status
- Stakeholders outside of marketing don't have access to the manual tool
- **Most teams use the same tool** to manage content production
- Ad hoc content production is not managed in the tool

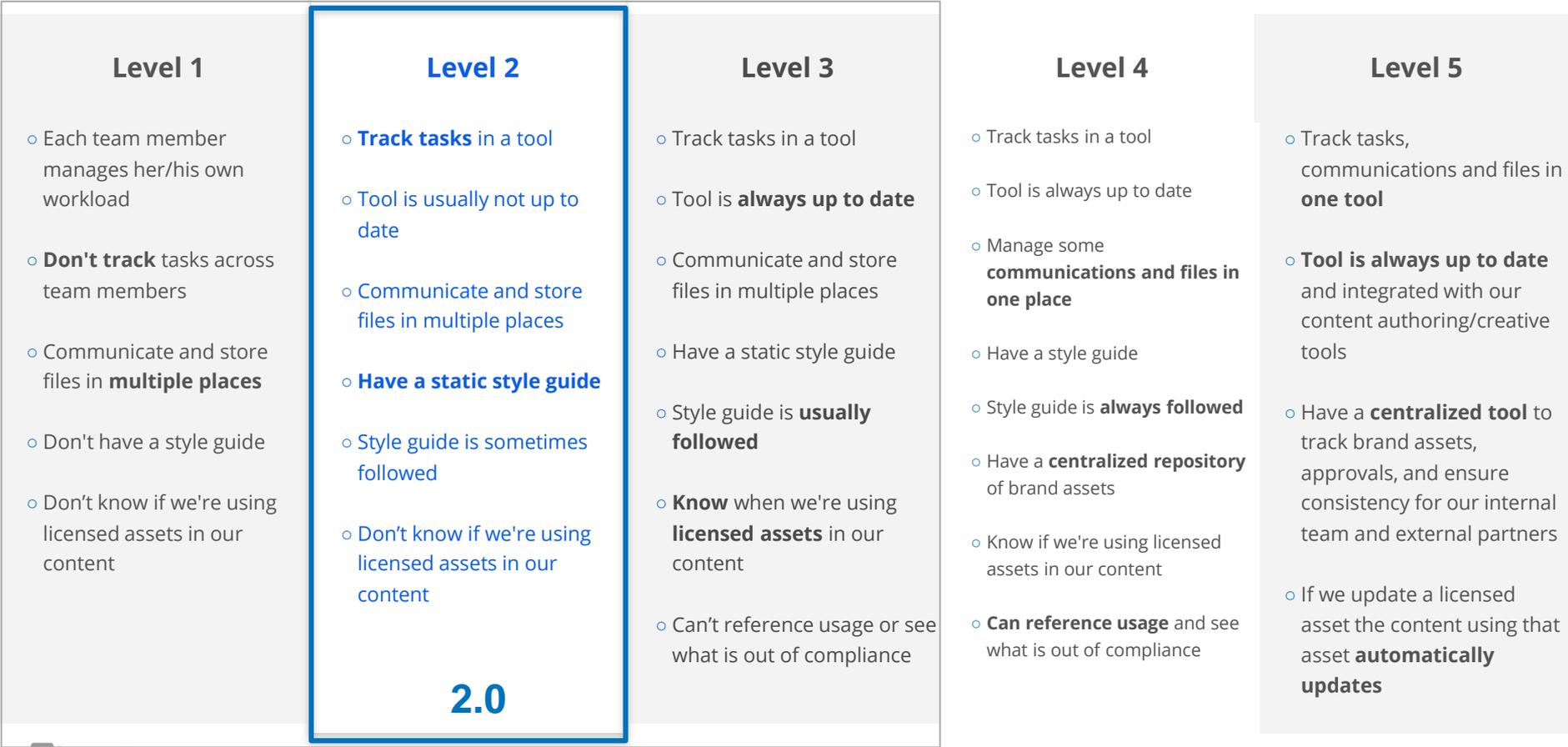
Level 4

- **Nearly always** create pillar content then break out pieces to repurpose within that program
- **Use a dynamic tool** to communicate content status
- Stakeholders outside of marketing don't have access to the dynamic tool
- Most teams use the same tool to manage content production
- **Tool is nearly always up to date**

Level 5

- **Always** create pillar content then break out pieces to repurpose across programs
- Use a dynamic tool to communicate content status
- All **stakeholders have access** to the dynamic tool
- **All teams use the same tool** to manage content production
- **Tool is always up to date** and illustrates cross-team dependencies

Create & Contextualize Content at Scale - MOVE TO 2.8



Recommendations

- Streamline content workflow and approvals
 - Establish SLAs by content type and task
 - Identify a system admin for Kapost to support content operations best practices and adoption
 - Monitor timelines, tagging and system administration
 - Review and optimize current content creation/approval process
 - Establish a governance process to manage ad hoc content requests
- Make content more scalable
 - Centralize content efforts in Kapost - "if it's not in Kapost, it doesn't exist"
 - Review content that is working well and target for reuse and promotion
 - Use derivative content model where useful and beneficial (pillar content with derivative assets)
 - Identify metrics for content re-use

Distribute

Deploying content that supports the customer journey, anticipates personalization, and amplifies your message, intelligently

Ensure Alignment to Strategy & Targets

Level 1

- Our people managing advertising, social, and partners **work in silos**
- Manage their own promotional spend

Level 2

- Our people managing advertising, social, and partners **work collaboratively to align messaging**
- Manage their own promotional spend

2.0

Level 3

- Our people managing advertising, social, and partners work collaboratively to align messaging **and target their audience**
- Manage their own promotional spend

Level 4

- Our people managing advertising, social, and partners work collaboratively to align messaging and target their audience
- **Manage promotional spend together**
- **Shared goals** tied to business objectives

Level 5

- Our people managing advertising, social, and partners work collaboratively to align messaging and target their audience
- Manage promotional spend together
- Shared goals tied to business objectives
- **Test content resonance** before allocating more resources

Compile & Personalize Journeys

Level 1

- **Multiple repositories** where customer-facing teams search for content
- Don't track who shares what content
- Earned, owned and influencer channel owners **work in silos**
- **Messaging differs** across digital channels
- Don't have tools in place to dynamically change which content a customer interacts with digitally

Level 2

- Multiple repositories where customer-facing teams search for content
- **CRM tracks what content is shared** and offers limited reporting
- **Messaging somewhat aligns** across digital channels
- Don't actively leverage influencers to promote content
- **Ability to A/B test** web pages
- **Manually use the results** to create self-selection flows in which customers see content that addresses their needs

2.3

Level 3

- **Key repositories** where customer-facing teams find and customize content
- **Specialized tool tracks what content is shared** but offers limited reporting
- Messaging somewhat aligns across digital channels
- **Encourage influencers to promote** content, but don't give tools to make it easy
- **A/B test messaging and correlate results** to customer profiles that incorporate publicly available data for robust segmentation

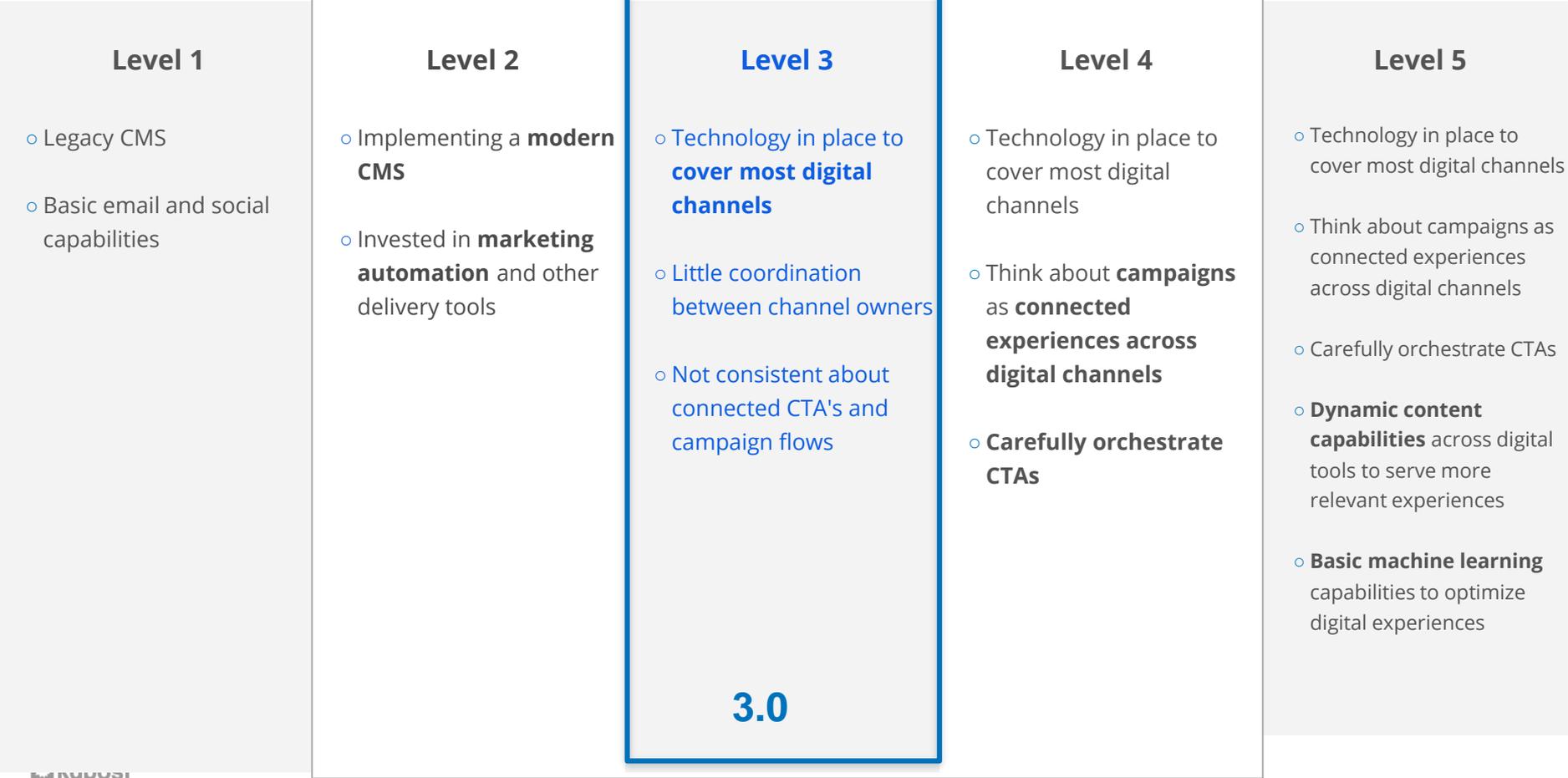
Level 4

- **Single repository** where customer-facing teams find content
- Specialized tool **tracks who shares what content**
- **Messaging well aligned** across digital channels
- **Tools enable influencers** to promote content
- A/B test messaging and correlate results to robust customer profiles created with multiple data sources
- **Change content assets** displayed on a webpage **based on that visitor's activity**

Level 5

- Single repository where customer-facing teams find content through **search and recommendations**
- Specialized tool tracks who shares what content **and engagement**
- **Messaging is always aligned** across digital channels
- Tools enable influencers to promote content **and get rewarded**
- A/B test messaging and correlate results to robust customer profiles created with multiple data sources
- **Dynamically compile digital content** that addresses individual's needs based on real-time data

Publish & Amplify (Digital)



Publish & Amplify (Events)

Level 1

- Events and content supporting events are handled by **separate teams**
- **Little integration** or visibility from the larger marketing organization

Level 2

- Event teams and creative teams **work together** to produce content specific to each event
- **Some input** from the marketing organization

Level 3

- Event teams and creative teams work together to produce content specific to each event
- Some input from the marketing organization
- Events team always **reaches out to attendees ahead of time**
- **Prioritize qualified leads** after the event

Level 4

- View **events** as an **integrated** part of buyer's journey
- Team **works closely with** marketing, sales, and channel partners
- Events team always reaches out to attendees ahead of time
- Prioritize qualified leads after the event

Level 5

- View **events** as a **critical channel** to deliver larger marketing message
- Run **persona based content campaigns**
- Produce **comprehensive digital experiences**
- Events team always reaches out to attendees ahead of time
- Prioritize qualified leads after the event

4.7

Recommendations

- Centralize content access
 - Identify owner for identifying and managing content to migrate to Kapost
 - Perform a R.O.T audit
 - Identify content for migration
 - Migrate assets into Kapost to centralize content for internal use
- Sales enablement
 - Work with sales / sales ops to understand how sales people look for content to share
 - Curate Gallery Collections with the kind of content and filters sales would find useful
 - Embed Gallery in a place where sales people spend the bulk of their time
 - Communicate and educate sales teams on how to find and share content

Analyze

Understand how my content strategy translates to outcomes and improve strategy and operations going forward.

Assess Returns on Strategy & Tactics to Inform Planning



Assess Operational Health

Level 1

- Don't have a content operation
- Different teams manage their own performance

Level 2

- Have a **content operation**
- **Only measure content performance** and not the content operation

2.3

Level 3

- **Measure content production SLAs, deadline compliance, and cost per asset**

Level 4

- Measure content production SLAs, deadline compliance, and cost per asset
- **Tools partially support data-driven improvements** to the content operation

Level 5

- Measure content production SLAs, deadline compliance, and cost per asset
- **Integrated tools support real-time dashboards** that allow data-driven improvements to the content operation

Analyze Performance

Level 1

- Don't have a way to assess content performance across teams
- There is a lot of **outdated, unused content**
- Don't have a way to look at message consistency
- Customers tell us our **messages are inconsistent**

Level 2

- **Most teams look at metrics** like views and time on page in aggregate
- **Manual process** to review content repositories and **archive/remove outdated content**
- Don't have a way to look at message consistency
- Across teams we **sometimes do retrospective meetings** when things go wrong

2.3

Level 3

- **All teams have a standard set of metrics** to assess content performance by key attributes of our audience
- **Standardized process** to periodically **audit** content inventory
- Based on the performance of an asset, we archive or flag it for an update
- **Manual process** to look at **message consistency**

Level 4

- All of level 3
- Use **A/B tests** to optimize content
- **Tools provide visibility** into majority of the content inventory
- **Regular process to audit,** archive, or update content inventory
- **Standardized process** to look at **message consistency**
- **Identify inconsistencies** and address them moving forward

Level 5

- All of level 4
- Use **near real-time content performance** to inform promotional budgets to amplify and promote high-performing content
- Tools provide visibility into **all** of the content inventory
- Standardized process to look at message consistency
- **Standard way to identify inconsistencies** and address them moving forward

Recommendations

Key opportunities that surfaced in the discussion:

- Define and analyze content operation health metrics
 - Define what's important to monitor for the operation (i.e. SLA compliance, average time to market, content visibility, strategic vs. non-strategic content)
 - Create dashboard views of reports
 - Review regularly to dig into areas of opportunity and repeat successes
- Analyze performance in real-time to make data-driven decisions
 - Define standard, meaningful performance metrics (including audience segmentation)
 - Identify sources for the metrics
 - Pull metrics into a BI dashboard to get 360 view
 - Review regularly and adjust placement/promotional spend

Maturity Assessment Results - 2.6 out of 5

	Plan	Produce	Distribute	Analyze
Governance Making decisions, allocating resources, and ensuring accountability to optimize content impact. 2.5	●●●○○ Align themes and budget with strategy	●●○○○○ Green-light execution and manage escalations	●●○○○○ Ensure alignment to strategy and targets	●●○○○○ Assess returns on strategy and tactics to inform planning
Orchestration Coordinating activities across teams, regions, product lines, etc... to ensure a cohesive experience. 2.3	●●●○○ Orchestrate integrated planning	●●○○○○ Provide visibility and coordination across teams	●●○○○○ Compile and personalize journeys	●●○○○○ Assess operational health
Execution Enable marketers to work effectively, efficiently, and adapt to constantly changing demands 2.7	●●●○○ Build asset level plans	●●●○○ Create and contextualize content at scale	●●●●○ Publish and amplify	●●○○○○ Analyze performance

Customer-Centric Strategy **3.3** | Strategic Taxonomy **2.7** | Integrated MarTech Stack **3.0**

Roadmap Effort Prioritization

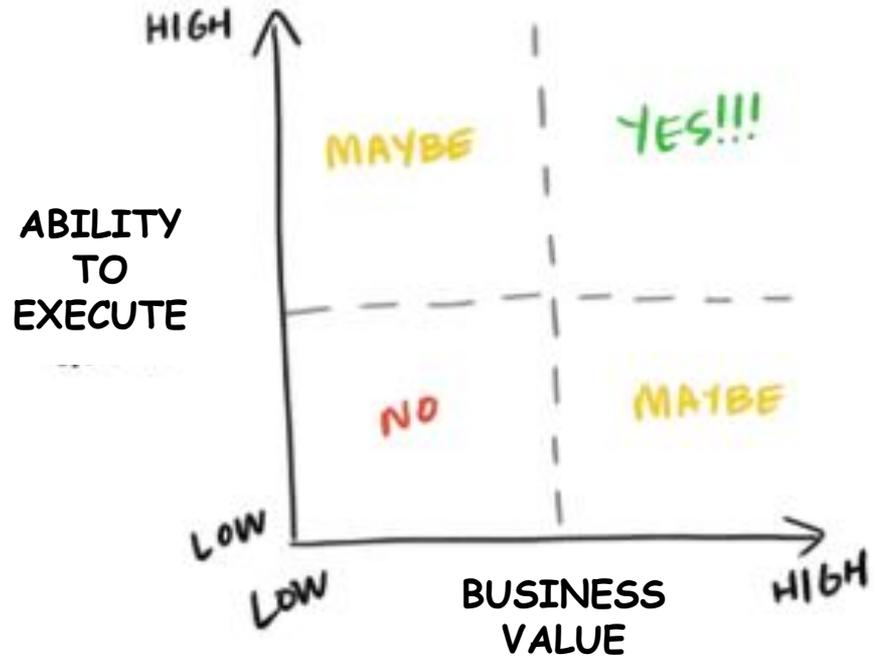
There's a lot of work to do. We have to start somewhere.

Prioritization Exercise

Prioritization based on two factors

Rank each one on a scale of 0-10, with 10 being the highest

- **Business Value**
 - Strategic alignment
 - Operational efficiency
 - Employee satisfaction
- **Ability To Execute**
 - Executive sponsorship
 - Level of team pain
 - Easy tech



Program Roadmap - SAMPLE

Phase 1: Establish the Foundation (current scope)		Phase 2: Establish Critical Mass		Phase 3: Transform the Business	
Deployment Groups / Use Cases					
Content Team		Marketing Team (remainder)		Communications Team	
		Export Help		Knowledge business	
		Onboard external stakeholders			
Technical Readiness					
SharePoint asset migration and replace		Outlook folder replace for Export Help		Data Platform*	
VSTS workflow replace		Eloqua - create content		MultiTrans / Localization*	
Sheets and Excel replace (calendar and inventory)		YouTube syndication			
Email attachment/notification replace		AEM* syndication			
Maturity / Change Efforts					
Ad hoc request intake					
Onboard new users per communications/education plan		Onboard new users per communications/education plan		Onboard new users per communications/education plan	
Measurement					
75% Adoption 90% Assets tagged w/target context 100% Editorial calendars in Kapost Content inventory in Kapost		75% Adoption 50% assets tied to an initiative		75% Adoption Relative target context coverage Decreased % of non-strategic, unplanned assets created Increased user satisfaction	

Let's prioritize

Per effort, rank each criteria on a scale of 0 - 10, with 10 being highest.

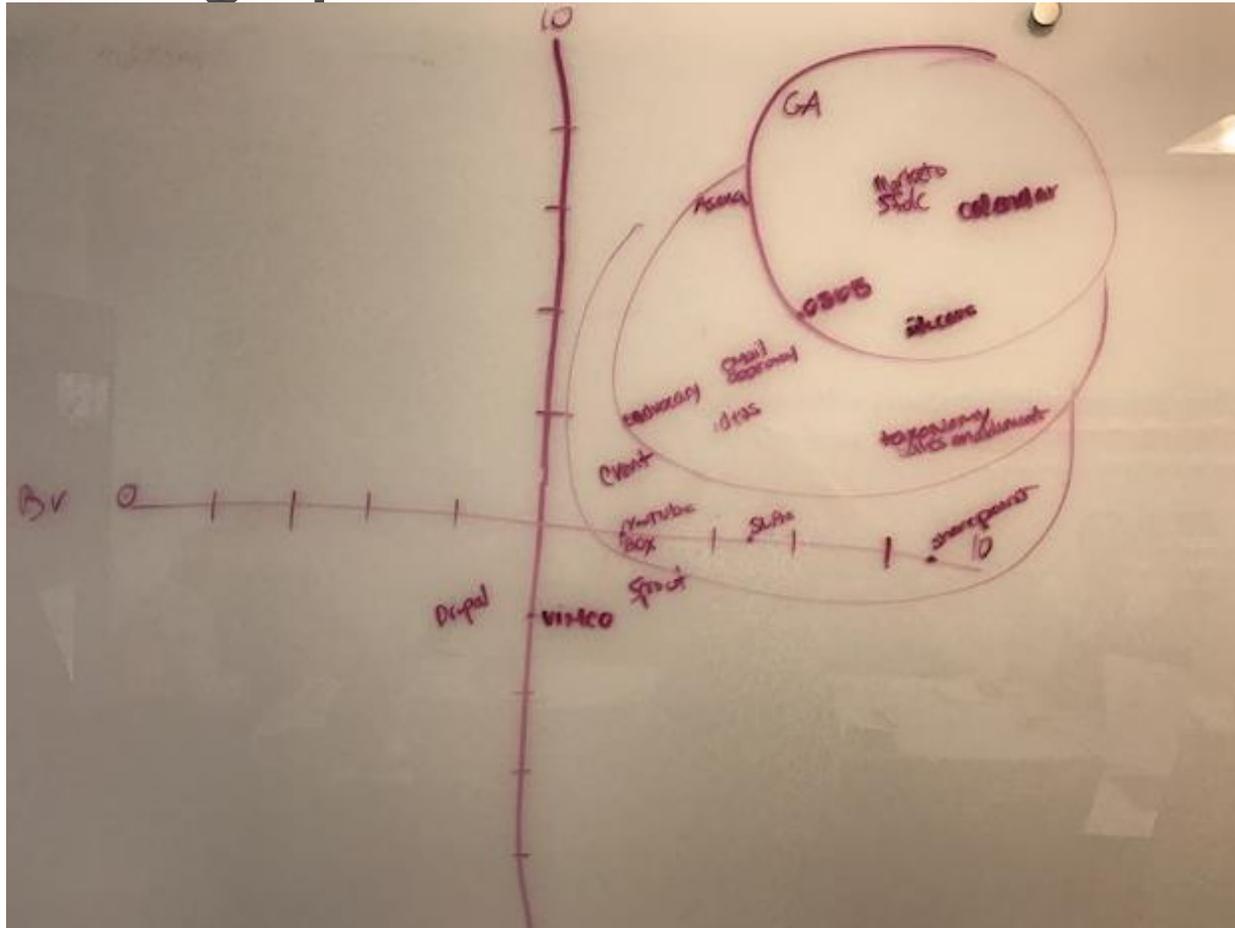
- Business Value
 - Strategic alignment
 - Operational efficiency
 - Employee satisfaction

- Ability To Execute
 - Executive sponsorship
 - Level of team pain
 - Easy tech

Prioritized Roadmap

And then there was a list.

Prioritization graph



Program Roadmap

Phase 1: Establish the Foundation (current scope)		Phase 2: Establish Critical Mass	Phase 3: Transform the Business
Deployment Groups / Use Cases			
Marketing team		Start sales enablement discovery	Sales Enablement
			Employee advocacy (?)
Technical Readiness			
Pull GA stats into Kapost		Migrate marketing assets from SharePoint	Publish event materials in Cvent* from Kapost
Co-create in Marketo / Kapost		Solicit content Ideas in Kapost	Publish from Kapost to Sitecore
O365 integration for content production / collaboration		Start discovery for Sitecore integration	Display content and reccos from Kapost to Salesforce.com
Replace Asana for content workflow		Publish to YouTube from Kapost	Define task level SLAs to enable smart deadlines in Kapost
Replace and migrate assets from Box to Kapost			Replace and migrate assets from SharePoint sales tool kit
Maturity / Change Efforts			
Onboard new users per communications/education plan		Standardize on a global taxonomy	Onboard new sales users
Replace Excel for calendars		Replace manual emails for content approvals	
Measurement			
75% Adoption	90% Assets tagged w/target context	75% Adoption User perception increases	50% assets tied to an initiative User perception increases
			75% Adoption User perception increases