

# Document Delivery — The Glamour and Power of It All

Getting content to the right person at the right time in the right format is a key part of any ECM strategy.

By Carl Frappaolo

If a tree falls in the woods and nobody is there to hear it, does it make a sound? Let's start this examination of document delivery with a similar philosophical question, "If a document is created, but nobody reads it, does it exist?"

Within the ECM community, much attention is paid to the management of content; controlling its lifecycle, storage, and retention. Indeed the acronym is ECM (enterprise content *management*) not ECD (enterprise content delivery). Often too little attention is paid to how the consumer of content interacts with the content. This brings to mind one of my all time favorite Dilbert cartoons. We create documents for a very specific reason, and then file them away, perhaps never thinking of how the content will interact with the user.

In the best-case scenario, ECM solutions will incorporate approaches to tagging and search to aid findability. In this regard, we are better off than the grim picture painted by Dilbert, but that is only the tip of the proverbial content delivery iceberg. Whether accessed in a push mode (e.g., an email blast) or pull mode (e.g., accessing a library of contracts from an online library), little if any attention is paid to the delivery mechanics and effectiveness. The more fortunate ECMers may be teamed with a good marketing team that will influence some aspects of content delivery (e.g., colors, layout). But we in the ECM community should take a more proactive role.

## Have Some Fun

Content delivery provides the greatest ability for artistry, pay-back, and "the fun" for the ECMer. The delivery options available to the ECM practitioner are richer than ever before. They provide a palette from which a virtually endless array of "content objects" can be created. Content delivery is the pinnacle of our profession. This is where the rubber meets the road so to speak. Leveraging myriad forms of content in myriad formats and media can create compelling one-on-one communication. The content that we manage has an impact on the audience. We can deliver content to educate (a book), transact business (an invoice), to influence buying decisions (brochures), and to build communities (personal profiles). Content delivery can be very powerful. It can provide points of control over the audience. Additionally, manipulating content in various delivery mechanisms can be fun.



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## **It's Not All About Fun – This is Serious Business**

But it is not just about the fun. There is a very compelling business reason for paying attention to content delivery like “information overload,” or “rising above the noise and getting noticed.” Many popular business authors now speak to this issue. There is so much content out there today that the communicator is seriously vying for the attention of the consumer/reader. Strategies have to be put in place to position your content so that it will rise above the noise, be noticed, and, most importantly, drive the action or reaction desired. Authors such as Marty Neumeier (*The Brand Gap*, *Zag*) position this within the context of marketing and branding. However, the arena for getting content noticed and properly leveraged is much broader. It permeates virtually every aspect

of business content. A well-executed content delivery strategy can ensure not only that your ads get noticed, but that customers are more inclined to use and be satisfied with online help, that your invoices get paid, and that your customers buy the products you want them to.

Unfortunately, this fun and powerful aspect of ECM is not without cost.

## **Ah, There's the Rub**

Effective content delivery doesn't just happen. Users do not stumble upon content. Instead, they must be guided to content. Users should not just be blindly presented content, but rather, have it delivered in customized, effective ways. Effective content delivery takes planning—a strategy.

In fact, the ECMer who wishes to embark on a strategic content delivery system must realize that effective content delivery starts with good information architecture (IA) design. IA requires content/process governance and an infrastructure

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## Metadata can be as crucial to the success of a content delivery strategy as the content itself.

to manage clear, understandable communications through a managed structure, context, and presentation of content. IA takes a cradle- to-grave approach to ECM. It is concerned with the authoring and capturing of content as well as the management and findability of content. The delivery of content is part of the ultimate promise of sound IA design, intuitive personalized access, and clear communication. Thus, there is no escaping the development of at least a partial IA strategy if you wish to embark on a content delivery strategy.

It therefore follows that the model for developing an IA is also the starting point for developing a content delivery strategy. That model is the intersection of the “Three Cs of IA”: content, community, and context. A content delivery strategy starts with an assessment of each. However, as with IA strategy development, it is the intersection of the “Three Cs” that gives rise to the requirements of and approaches to content delivery. That said; each facet of the design needs to initially be looked at individually.

There are two basic approaches to determining the current state and future state of the “Three Cs of IA.” The descriptive approach to strategy development begins with defining and envisioning the desired end state of delivery and then defining the needs from the “Three Cs” by working backwards. The prescriptive approach begins with a definition of the current state of each of the “Three Cs” and using them to shape the ultimate result or delivery state. Either approach works. In reality, most design teams find themselves waffling between the two approaches. In fact, the defining of the “Three Cs” and manipulating them to shape a delivery strategy is typically an iterative process. You may start with a high level vision (descriptive), then execute some investigation into the current state of content inventory (prescriptive), and, based on what you learn, redefine your vision. The designer should remain flexible. Either way, there are certain properties and elements you should look for in each of the “Three Cs.”

*Content* – Start with conducting a content inventory. In this case, it is not necessarily a simple content inventory. The goal is not just to determine what is available (or in the case of a descriptive approach, but also what needs to be available). A listing of topics covered; the degree of detail; and versions, revisions, and formats available is just the beginning. All of

that needs to be uncovered, but the level of granularity within each content resource must also be determined. Is the content one unintelligent BLOB (binary large object) or a family of intelligent, definable, individually accessible, and managed components? For example, is a book just a book or a family of linked, individually accessible chapters? Is a contract just a single PDF file or a family of clauses, some standard, and some custom, linked to create a single document? Is a blog a single stream of text or individual pages of postings? Is a brochure a single file or a family of individual bodies of text, pictures, and data? The granularity of content is pivotal to delivery strategy. The more granular the content, the more flexible or custom the approach to delivery can be. Content repurposing, security, and access at sub-levels is only available to the degree that the content is accessible at these sub-levels.

The inventory must also determine (again both in a prescriptive and descriptive mode) the physical format of the content. To what degree are text, video, pictures, and audio available? Are digitized odors available? Should they be? (If these two questions seem far-fetched, see my blog entry at <http://www.takingaiim.com/2007/07/ecm-do-you-smel.html> for more detail on the use of olfactory content in an ECM.)

Content assessment is a good example of where the process is likely to become iterative, and move from prescriptive to descriptive. Current inventory may indicate that certain content is only handled in one media. For example, product descriptions may only be captured in text format. A descriptive assessment may conclude that there is great measurable advantage to be had if product descriptions were available in pictures as well. In addition, this would cause a need to change the practice of only detailing product via text descriptions to be augmented through the capture of product images.

In the pursuit of a content delivery strategy, there may be a need to create “new content” in the form of additional concepts/topics, translations into other languages, or additional physical media types. If the gap in content has a seriously negative impact on the content delivery strategy, then there is a need to fill that gap. An investigation into content puts the content delivery strategist close to the authoring process. Where content is missing, an author has to be identified.

Where content is available, but not at the level of granularity and/or in a non-preferred format, the delivery strategist must get an author to rethink their authoring process and/or tools used. Even in cases where content of a certain type exists, for example a contract, if it has not been captured at the desired level of granularity (i.e., an inability to separately and distinctly deliver individual clauses), then the content must be “re-authored” or reformatted.

The content inventory must look at not just the content per se, but the metadata used to track the content as well. Most information architects and records managers understand and appreciate the value of metadata. While metadata is relevant to many strategies, including records management and website design, it is most critical to a content delivery strategy. If content is to be individually manipulated, combined, and recombined within different communities and contexts, then there needs to be a means to identify each piece of content. That is the role of metadata. As will be discussed in the following paragraphs, the more pathways or combinations of content/community/context that are targeted by the delivery strategy, the greater the need for and number of meta tags necessary. Metadata can be used to influence relevancy ranking, establish relationships between content objects, match content to communities, provide navigational links to “related content,” and many other purposes. Metadata can be as crucial to the success of a content delivery strategy as the content itself.

Often the metadata captured prior to the development of a delivery strategy is not robust enough to support the delivery strategy. The delivery strategy therefore encroaches upon the metatags design and capture routines, placing new demands on each. Similar to the content itself, the level of granularity on the metadata is directly proportional to the degree of control and personalization capabilities of the content delivery system. This is especially true about the metadata used to track not the content, but the community (the second “C” of information architecture). It is typically within the definition of metadata that the overlap between content and community begins to emerge. That brings us to what to look for in a community audit.

*Community* – Similar to a content inventory, a thorough content delivery strategy should include a community inventory. Who are the consumers of the content? This can be a potentially easy decision. The delivery strategy may make no assumptions about community and lump all users into one large category—“them.” But the level of granularity with which you track the community holds the same, if not more potential power and flexibility, then the granularity imposed on content tracking. Is there (or should there be) metadata used to identify and categorize user types? What benefits can be derived from personalizing content to particular user types? The more compelling the business case, the more likely the content delivery strategy will demand tracking mechanisms/meta tags on the community.



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## Each intersection of content and community represents a different context that may require its own unique approach to authoring, structure, and delivery.

### BI Meets ECM

There are multiple potential ways to divide a community into sub-communities. The more business intelligence (BI) there is about a community, the greater the potential value derived from a content delivery system that specifically targets particular content and formats to a particular subgroup of users. Political campaign teams have been using these techniques for several years. Intelligence about identifiable different voter populations (e.g., different age groups, gender groups, socio-economic groups), is used to customize targeted brochures, websites, “personalized letters,” and speeches. Depending on the targeted community and their “profile,” different topics are stressed, different pictures are used, or different color schemes are deployed. One message/one approach for all voters is not the norm. (For more discussion on how political campaigns are using targeted delivery strategy, see my blog entry at <http://www.takingaim.com/2007/07/ecm-roi---detail.html>).

Sub-communities can be identified by relationship (e.g., customer versus prospect), age, geographic location, buying habits, reading habits, etc. Thanks to Amazon.com, we are all familiar with the use of BI to build profiles of sub-communities and using these to publish tailored, customized “marketing” collateral. Whether used in a relevancy ranking or a means to push “popular” content, you can be dynamically joined to communities (e.g., those that read this book also read that book.) This is social network analysis in a content delivery setting.

A most powerful form of community targeting is geographical location, especially when linked to other forms of intelligence within the delivery system. For example, a potential traveler to Egypt from Florida may receive a brochure that does not talk extensively about the wonderful climate of Egypt and its clear coastline and beaches, as intelligence shows most Floridians typically do not seek “warm sunny weather” as an escape. The “Floridian” version of the brochure may provide content stressing the historical and cultural sights of Egypt. However, a potential traveler to Egypt from Alaska may receive a brochure that has a balanced presentation of culture and history along with detail on the beauty of the coast, warm weather, and ability to snorkel in coral reefs.

Geographical trackers (a la GPS-like technology) are an emerging and powerful way to provide low granularity, real-time BI on a content user’s location. Content delivery in a push mode can be triggered based on a user’s proximity to particular locations. For example, coupons could be pushed to a consumer’s cell phone based on proximity to a store or even a particular aisle in a store. A stranded traveler who accesses the online yellow pages looking for a towing company is pushed a list of towing services automatically ranked by proximity to the individual.

Multiple content resources captured in flexible levels of granularity, coupled with the tracking of multiple sub-communities with identifiable preferences and content needs, leads to a multitude of content delivery models. Just how far should a content delivery strategy be pushed? How much content should be captured and at what level of granularity? A content delivery strategy must be targeted to specific approaches, those that provide the highest degree of payback. Determining the most attractive approaches requires investigation into the last of the “Three Cs,” context.

*Context* – Analysis of context looks at the intersection of community and content and asks the question, “Why?” Why has the individual been brought to this body of content at this point and time? Why is this content relevant to this person and what is the desired outcome of providing the content in this situation? Why is this content being provided at this point? Is it to increase membership in a club, to build brand awareness, to educate effectively, to decrease calls to customer support by providing effective online help, to drive sales overall, to drive sales of a single particular product, to expedite payment, or to increase the speed of decision-making? Each intersection of content and community represents a different context that may require its own unique approach to authoring, structure, and delivery. Consider the visitor to an online clothing store. Is the purpose of the website to simply educate the customer on what is available or to influence buying decisions like a good sales person? Is the content delivery system linked to a personal profile of the customer, which influences the colors articles of clothing are displayed in? Is the content delivery system linked to an inventory system and used to “push” sales items in order to move targeted stock?

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## From relevancy ranking to media selection, content delivery needs to be addressed, because it has a direct impact on the effectiveness of content, which can be directly tied to bottom line benefit.

When you have access to a family of content, insight to community, and the business rules or context, then content delivery can be a new level of communication, an art if you will. Art? Yes, and as an artist, you need to pick your medium.

### **Marshall McLuhan — *The Media is the Message***

Content can be delivered in many forms and media ranging from paper to Web pages, in formats from text to audio. A thorough content delivery strategy will not ignore the medium, but strategically select and leverage it. In some cases, the choice is not the content strategist's (e.g., the content consumer dictates the medium by accessing the content through a cell phone); in others, the strategist chooses to provide specific content in specific contexts in specific media (e.g., a decision to provide installation instructions on a DVD with embedded video).

In the case of the content consumer "dictating" the media type, media type may be another way to define sub-communities, where a community of "sales" and a community of "customers" may be further refined to "sales on a handheld PDA," "sales at their laptop," "customers on a cell phone," or "customers reading a paper brochure." In each instance, it behooves the content delivery strategist to determine if specific delivery strategies can be developed that leverage the strengths and weaknesses of each media, and tailor delivery to increase readability, comprehension, and drive the desired action/result.


In situations where the content strategist has control over media, then each available form of media should be evaluated for each intersection of content, community, and context. Does one medium lend itself to communication that is more effective or to a better business case? Recognize that each media type and content format has unique strengths and weaknesses. For each media type, investigate the options specific to that media and do a cost/benefit analysis.

Paper has great appeal to many from a legacy/comfort perspective. It is also highly portable, and can, in some cases, rise above the noise of the other forms of media. In some instances,

the strategic use of color ink can evoke rapid responses. (Those who want to learn more about effective use of paper-based print should visit the EDSF resource center—[www.edsf.org/research.cfm](http://www.edsf.org/research.cfm)).

Electronic media comes in many forms (i.e., DVDs, handhelds/cell phones, bendable computers/digital paper). Each of these has strengths and weaknesses. Collectively, they provide both static and dynamic content capabilities. Electronic media can be used in real-time, (e.g., the fact your favorite coffee store is today featuring a special on your favorite drink, coupled with the fact that you are now just two blocks from the store triggers the delivery of a customized coupon to you, in real-time.) Electronic media increases the type of content available (including text, image, audio, video, olfactory, and soon—taste). The use of each as the most effective way to communicate particular content to particular communities within particular contexts deserves an investigation and justification (e.g., that coffee drink coupon includes the smell of a fresh hot cup—and doing so increases sales by 50 percent).

### **Take AIIM on Delivery**

AIIM defines ECM as "...the technologies used to capture, manage, store, preserve, and *deliver* content..." (emphasis added). However, many ECMers pay little attention to the delivery aspect of ECM. ECM should not be focused only on capture, storage, and retention. Retrieval and access are critical components of an ECM strategy, and in that regard, content delivery or how the content is physically retrieved and presented is fundamentally important. From relevancy ranking to media selection, content delivery needs to be addressed, because it has a direct impact on the effectiveness of content, which can be directly tied to bottom line benefit. Besides, content delivery can be creative and fun. 

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