The Path to Global Customer Experience:
DITA with Quality Built In

DITA & The Global Customer Experience
Webinar Series
Our Presenters

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SVP Content Technologies
SDL

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Localization Manager
FICO

Tom Smith
Product Marketing Manager
SDL
Agenda

- A Recap: Tech Docs As a Platform for Customer Experience
- Content is King: Focusing on the Content as well as its Delivery
- Quality and Global Content: Why It’s Important
- The Power of DITA with Quality Built In
- FICO’s Story: The Path to Global Customer Experience
- The Vision: “Living” Documentation for Global Customer Experience
- Q&A
What we covered in last webinar

Paradigm Shift: Technical Documentation is being transformed from a backend delivery organization into an organization that impacts customer experience and customer engagement.

What we’ll discuss today

The best customer experience is not only about the delivery, it’s also about the content. The quality of the content combined with the delivery methods heightens global customer experience.
Recap: The Integrated Customer Experience

**BUYING CYCLE**
- Looking at other buyers' experiences online
- Download documents before buying
- Research
- Comparative shopping

**POST SALES CYCLE**
- Run into a problem; Do a Google search
  - Find YouTube or community answers
  - Search your Website
  - Upsell

*SDL*
The Reality of Customer Experience

PRE-SALE

COMPARATIVE SHOPPING
REVIEWS
TECHNICAL DOCUMENTS
ACCESSORIES

POST-SALE

FAQ'S (KNOWLEDGE BASE)
SUPPLIES
REPORTING ISSUES
TROUBLE SHOOTING

DEAD ENDS
90% of HP’s customers buy based on content, not on touching the product

* Gilbane Globalization blog – Mary LaPlante, 2008
“New products need to be launched simultaneously across all markets... Our quality and consistency were suffering, leading to poor communications with customers and potentially damaging the Philips brand.”

Luuk de Jager, Global Content Management Senior Manager, Philips
Charging the Battery

Before connecting the travel adapter to the phone you must first install the battery.

1. With the arrow facing you as shown in the diagram push the plug on the battery adapter into the socket on the left side of the phone until it clicks into place.
WARNING: Switch power off only when the fan has stopped
WARNING: Switch power off once the fan has stopped
WARNING: Disconnect power only when the fan has stopped
WARNING: Never switch the power off until the fan has stopped
WARNING: Do not power down until the fan has stopped
WARNING: Do not power down before the fan has stopped
WARNING: You must wait until the fan has stopped before switching off the power
WARNING: Wait until the fan has stopped running before switching off the power
WARNING: Do not disconnect power if fan is running
WARNING: Fan must be stopped before disconnecting power
Why is Quality Important?

<table>
<thead>
<tr>
<th>Definition of Maturity Class</th>
<th>Mean Class Performance</th>
</tr>
</thead>
</table>
| **Best-in-Class:** Top 20% of aggregate performance scorers | - 91% of publications meet authoring deadlines  
- 88% of publications meet source language quality targets  
- 20% reduction in time required to develop source language content in the past 12 months  
- 23% increase in customer satisfaction scores over past 12 months |
| **Industry Average:** Middle 50% of aggregate performance scorers | - 84% of publications meet authoring deadlines  
- 84% of publications meet source language quality targets  
- 6% reduction in time required to develop source language content in the past 12 months  
- 10% increase in customer satisfaction scores in the past 12 months |
| **Laggard:** Bottom 30% of aggregate performance scorers | - 52% of publications meet authoring deadlines  
- 45% of publications meet source language quality targets  
- 5% increase in time required to develop source language content in the past 12 months  
- 7% increase in customer satisfaction scores in the past 12 months |

Source: Aberdeen Group, September 2010

- ‘Source language quality’ is a key deliverable for best-in-class documentation
‘Quality and Clarity of Content’ was rated as the number one concern from a survey of 469 technical communicators...

...more important than ‘achieving time-to-market deadlines’ and the ‘levels of content reuse’

*Global Authoring Survey, SDL, 2010*
Why is Quality Important?

**Improving customer experience** was a leading driver for improving the quality of information, cited by over 90% of respondents.

*Source: Content Optimization, Common Sense Advisory, May 2010*
What Pressures and Trends Impact Quality?

Added Pressures On Content Developers

- Faster Product Lifecycle Changes
- Agile - Iterative Development
- Solutions Oriented
- More Sensitivity to Customer Profiles
- Distributed Teams
- Outsourcing
- Headcount Constraints
- SimShip (Simultaneous Launch)

Changing Expectations From Content Consumers

- Want Information via the Web, Search
- Growing Expectation of Bite-Size Topics
- What I Need When I Need It
- Increased Language Expectations
- Community Feedback
- Targeted and Tailored Information
- Solutions Oriented
- Impatient
- Consistency Expectation in Support & Documentation
Responses to These Changes

Added Pressures On Content Developers

Move to XML structured content / DITA

Improve quality and consistency of content

Changing Expectations From Content Consumers

Move to dynamic publishing for Technical Publications

Localization Strategy for Global Customer Experience

Global Authoring
How do Organizations Address Quality and Global Authoring?

An initiative usually starts with the style guide...

Style Guide

- 78% of technical communicators have some form of a style guide and 49% combine industry guidelines with their own bespoke style guidelines*
  
  - Style guide is a static document, often left untouched
  
  - Automating your style and language guidelines ensures adherence to quality across the organization

*Global Authoring Survey, SDL, 2010
Branding and quality are addressed with terminology management

- 65% of tech docs manage terminology in some form*
- Spreadsheets, glossaries, style guides are most common form, but not efficient
- Managing terminology centrally and sharing between groups achieves consistency

* Global Authoring Survey, SDL, 2010
Combining DITA with content quality and the localization process

- Makes content easier to find
- Improves branding for docs that are key to the sales cycle
- Ensures consistency globally
- Streamlines publishing time

To deliver a consistent GLOBAL customer experience
Household name in **Credit Scoring**

**FICO® Score Summary**

Your Equifax FICO® score: **799**

On July 9, 2007

Your Equifax FICO® score is great

Your score is well above the average score of U.S. consumers and clearly demonstrates to lenders that you are an exceptional borrower.

Your Equifax FICO® score is based on the information in your Equifax credit report. Below are factors in your credit report that are hurting or helping your score:

<table>
<thead>
<tr>
<th>FICO® score ingredients</th>
<th>How you rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment history</td>
<td>Great</td>
</tr>
<tr>
<td>Your history of paying bills on time.</td>
<td></td>
</tr>
<tr>
<td>Amount of debt</td>
<td>Very Good</td>
</tr>
<tr>
<td>Your total amount of outstanding debt.</td>
<td></td>
</tr>
<tr>
<td>Length of credit history</td>
<td>Very Good</td>
</tr>
<tr>
<td>How long you've had credit.</td>
<td></td>
</tr>
<tr>
<td>Amount of new credit</td>
<td>Great</td>
</tr>
<tr>
<td>Amount of credit you've recently</td>
<td></td>
</tr>
<tr>
<td>obtained or applied for.</td>
<td></td>
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**World’s #1 credit bureau score:**

the FICO® score
### Leader in Decision Management
transforming business by making every decision count

| Profile | The leader in decision management  
|   | Founded: 1956  
|   | NYSE: FICO  
|   | Annual Revenue (approximately): $600 million |
| Products & Services | Analytics: scores and models  
|   | Decision management applications  
|   | Decision management tools |
| Clients & Market | 5,000+ clients in 80 countries  
|   | Primary Industries: Financial services, insurance, retail, healthcare |
| Offices | 20+ offices worldwide  
|   | HQ in Minneapolis, Minnesota  
|   | Regional Hubs: London, Birmingham (UK), Madrid, Sao Paulo, Bangalore, Beijing, Singapore |
We would need to make **big** changes to enable this

The new paradigm

The old paradigm

- CUSTOMER MGMT
- Blaze Advisor
- FRAUD
- Collections & Recovery
- Model Builder
- ORIGINATIONS

Customer Mgmt.
Fraud
C&R
Originations
Old Process: Write FrameMaker Books

- Independent Product teams
- No sharing or reuse
- Multiple reviews of similar or identical content
- Large content “chunks,” cumbersome review/update process
- Inefficient and costly localization

<table>
<thead>
<tr>
<th>Originations</th>
<th>Author</th>
<th>Review (PDF, chapter or book)</th>
<th>Edit</th>
<th>Finalize</th>
<th>Desktop publish / Webworks Help</th>
<th>To Dev. / build</th>
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Thousands of Topics, Even More Versions!

- EDM Tools
- Originations
- Fraud
- Collections and Recoveries
- Customer Management

Common Component Layer

- Case Management
- Strategy Management
- Data Access Model Descriptions
- System Admin
- Reporting
- Release Notes

revisions
Trickle-Down Nightmare for Localization

**Translated Topic Management**

» Each of these topics may be translated to many languages.

» Not all of them will be translated in all languages.
Streamlining Documentation Processes

To help make a clean move to DITA and ensure quality content in all language, we needed to:

1. Define English terminology
2. Define standards
3. Figure out how to enforce the standards
Global Terminology – Creation and Maintenance

» Before we could start sharing content, we had to consolidate our terminology.

» Better user experience, help with branding, better quality.

**Same idea, different terminology:**

Concept: The business process by which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules, which can be partially or completely automated.

Term: “Workflow” (in Originations) and “Process Flow” (in C&R)

**Same terminology, different idea:**

Term: Statistical Report

Concept (in Fraud): A report that pulls from historical data. Usually this is summary data that is generated by a report service and persisted in non-production tables designed for this purpose, in order to enable reporting on large amounts of data without the need to query the production tables.

Concept (in TRIAD): A report that lists values based on processed and/or analyzed data.

» DM Glossary project was born
Multiple Divergent Glossaries – No Real “Master”

Emailed suggestions
Product glossaries
Industry glossaries
Product family glossaries
Misc. glossaries on the CIC
### Getting Buy-in Across the Company

**Product Documentation:**
- Elizabeth Gschwind
- Tom Goering
- Jane Randolph
- Carroll Rotkel

**Global Architecture**

**Product Management:**
- Originations
- Customer Management
- Fraud
- Collections & Recovery
- Common Components

**Analytics**

**Security and Sys Admin**

**Marketing**

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<table>
<thead>
<tr>
<th>Glossary Term</th>
<th>Definition</th>
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<tr>
<td>adaptive anal</td>
<td>Predictive model or decision that automatically leverages business strategies and data dependencies</td>
</tr>
<tr>
<td>adaptive contr</td>
<td>Decision that automatically leverages business strategies and data dependencies</td>
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Product Documentation has final say on the phrasing of the definition. Product Management has final say on the technical content.
Terminology Now

» Everything in one place, one definitive source.

Employee Resource Center
- Corporate Glossary
- Fair Isaac Company Store
- Insights White Paper Series
- Benefits Portal
- Fair Isaac University
- Product Information Center
- Corporate PowerPoint Template
- Postini
- CIC Support

News & Events
- News Releases
- Events

Glossary
Welcome to the new Corporate Glossary. If this is your first time here, check out our FAQs at the bottom right hand corner of the page. Otherwise, you can search for a term by either selecting the letter the term begins with or by searching the glossary.

Find a term alphabetically...
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All Terms

Search the Glossary

Recent Updates
- scorecard
  A type of predictive model in which points are given to different data variables, and the points are added to generate a score. This score can be used to rank-order the relative likelihood of a given outcome, such as payment, fraud, or expected collection amount.

- extended support
  Extended support entitles the client to continue support on Releases outside the General Policy Guidelines.
Standardizing and Enforcing Localized Terminology

Moved away from standalone product/language glossaries to one glossary for all products and languages

SDL MultiTerm
Defining Standards

FICO’s Style Guide was completely rewritten for DITA.

» Standardized phrasing
» Identified approved and forbidden terms
» Included information on minimalism
» Defined graphics and diagramming standards
» Defined capitalization & punctuation standards
» Etc.

Recommendations -> Requirements
Tying it all together: SDL Global AMS

» WRITERS

» SDL AuthorAssistant interfaces with Translation Memory, MultiTerm, and Style Rules

» Improves quality and cost to localize

» Authors work in familiar tools

» TRANSLATORS

» MultiTerm (DNTs, acronyms, approved vs. unapproved terms)

» Terminology sequencing makes it possible to keep old information without jeopardizing quality.

» Ties into TMS

» Linguists don’t have to search for terms
The Future of DITA at FICO

» On-demand publishing?

» Live commenting from Professional Services, Sales, or Support?

» Client-customized deliveries?

» Crowdsourcing translation?

» Machine translation?
The Vision
The Vision

‘Living Documentation’ for Global Customer Engagement

- Use DITA as the foundation
- Collaborate on content development
- Built quality into the process
- Localize for global expansion
- Publish on the fly to customers
- Track analytics and action them
- Collaborate with customers to create content
“Living” Documentation for Global Customer Engagement

Live Collaborative Docs | Print

Quality & Global Authoring

Extensibility (Authoring / SME)

Structured Content Foundation

DITA
Adoption of XML Expanding In Enterprise
Adoption of XML Expanding In Enterprise

SDL Translation Management System

SDL Trisoft

Next-Gen Web Content Architecture
Next Generation Web Architecture

SDL Tridion
SDL LiveContent
SDL Trisoft
WEB CMS
LIVECONTENT
CCM
DITA

CRM
USER PROFILING

USER DOCUMENTS
SUPPLIES
TROUBLE SHOOTING
PURCHASING DATA
UPSELL OP
COMMUNITY
Thank You for Joining Us

Next DITA webinar...
- The Vision of Global Structured Authoring at Hach
- Tuesday, March 22, 2011
  

Hear about DITA in person...
- 2 day conference - Santa Clara, CA
- Focus on Engaged Global Customer
- No cost – Registration is required

[www.sdl.com/innovate](http://www.sdl.com/innovate)
Questions?