

Is it time you changed your CCMS?



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WHITE PAPER

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As business needs, technological advancements, and strategic goals evolve, companies must review their major IT systems to ensure they remain fit for purpose.

This is particularly true of your DITA CCMS, considering recent changes in the CCMS landscape, including multiple mergers and acquisitions.

Introduction

DITA stands for Darwin Information Typing Architecture. It is an XML-based open standard for designing, writing, managing, and publishing information. DITA is commonly used in technical communication and is particularly well-suited for creating and organizing complex product and system documentation.

DITA first appeared outside IBM in June 2005, with its approval as an OASIS (Organization for the Advancement of Structured Information Standards) Standard. In 2005, co-founder Jawed Karim uploaded the first-ever video to YouTube about his visit to a zoo. It would be another two years before Steve Jobs stood on stage and showed the first-generation iPhone.

And so, DITA has been with us for a very long time, as have some of the systems used for DITA management. Early adopters of DITA bought early technology. And, just as YouTube and the iPhone have transformed the world as they have undergone constant innovation, Component Content Management Systems have also evolved.

Few people can claim they were aware of a system's faults and shortcomings before purchasing it to address complex challenges such as DITA. Since your system was first deployed, your needs have almost certainly evolved, and so now is an excellent time to review your CCMS.

Despite how much work went into the original selection process, over a period of time, things change:

- > The way you work changes,
- > you need to support new products,
- > in more languages,
- > deliver content in new ways,
- > with fewer resources.
- > You may also find that your vendor stops supporting your particular solutions.

At the same time, the CCMS vendor is developing new modules and features, driven to do so by higher-value customers and new opportunities that could be in a completely different industry.

The system you originally selected, and your needs will rarely evolve along the same path (unless you happen to be a CCMS vendor's biggest customer and you're doing the influencing).



Why did you choose DITA?

One of the early arguments for DITA was portability – if you didn't like one system or it couldn't do what you wanted to do, you could take your data to another.

Not many companies have changed their CCMS, but they have changed many other core applications.

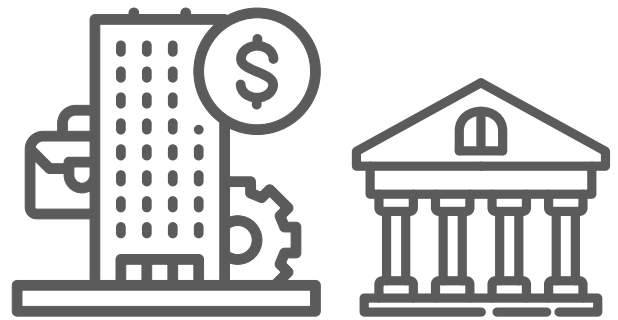
- > CRMs are changed regularly; a Forbes report stated that 1 in 4 small businesses changed their

CRM in 2022. Larger enterprises may be marginally more faithful to their systems, but not by much.

- > ERP systems were much rarer in 2005; but common twenty years later. Again, these are often replaced.
- > Website and marketing platforms are also changed every few years.

As individuals, we are forever replacing things: phones, computers, cars, houses, etc.

While some companies recognize the need for change, why are so many companies still trying to make do with a CCMS that has failed to deliver? Is it fear of change or cost or any of a hundred other small reasons?



Financial Institutions

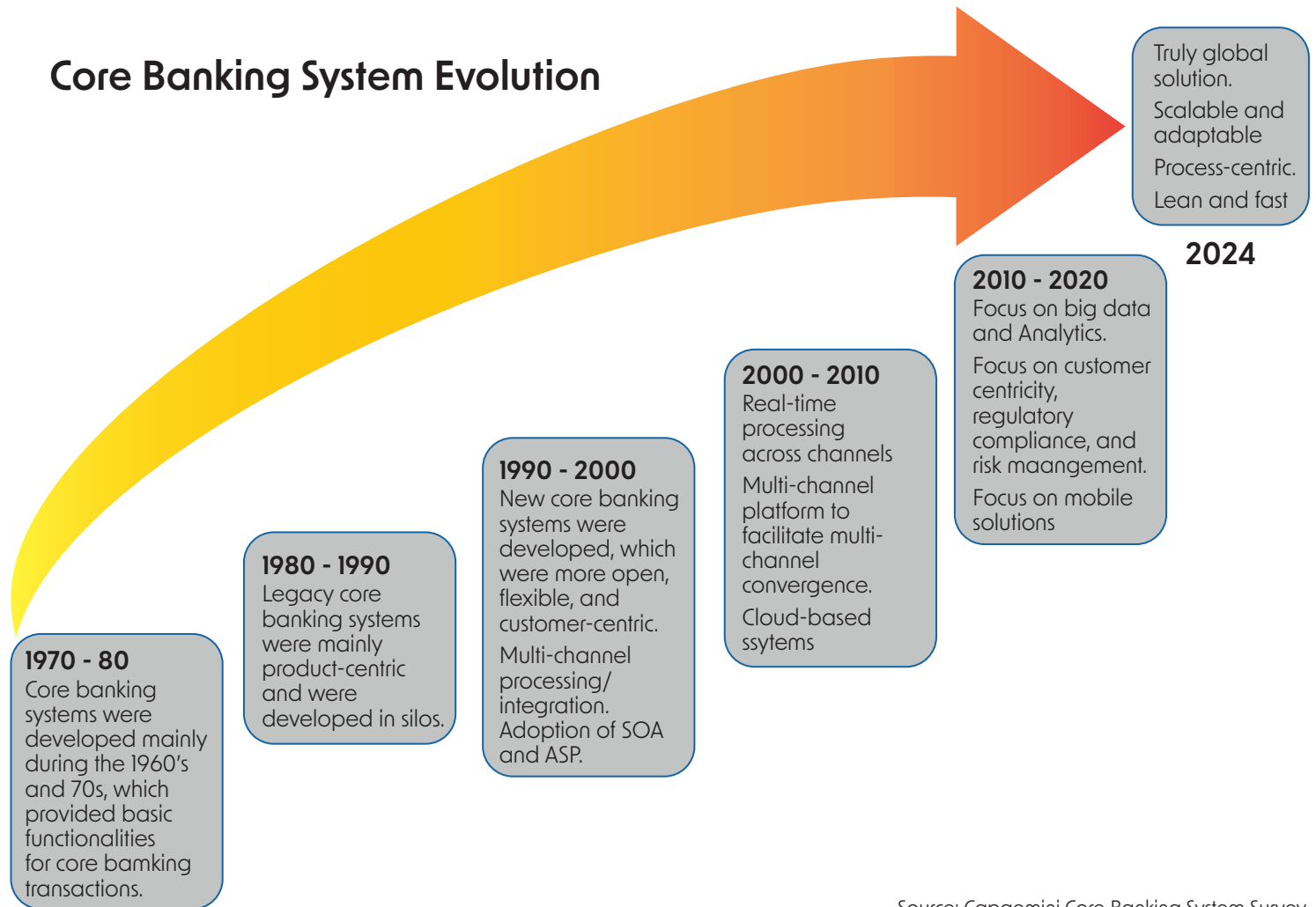
There was a time in the author's career when they spent 90% of their days talking to banks and other financial institutions.

Many direct comparisons that can be made between the systems that underpin a bank and DITA component content management systems that underpin documentation departments. But there is a real difference in Banks and other financial institutions approach changing software.

To move goods around the world, you need banks around the world to send and receive the funds. Within global financial centers, alongside the regular high street banks, Building Societies, and Credit Unions, you will find 'local branches' of foreign banks. For example London has over 250 of these banks.

What can we learn from how banks view their core systems?

Underlying a Bank's infrastructure is the Core Banking System – these applications perform all mission-critical operations related to accounts, loans, mortgages, etc. And they've evolved over time.



Source: Capgemini Core Banking System Survey

- > The first systems came along in the 70s and ran on mainframe systems.
- > In the 80s, package-based solutions began to appear, but these were limited by size.
- > The 90s saw new players entering the market offering more flexible systems.
- > Most recently, the systems developed have focused on mobile banking and flexibility.

The average lifespan of a core banking system is less than ten years and banks will typically switch supplier when changing system.

So, every ten years, they throw out millions of dollars of technology and replace it with a new system.

Why do they change?

Capgemini's report on the Bank's drivers for change when moving from one core banking system to another broke them down into internal and external drivers:

Internal drivers

- > Product and channel growth.
- > Legacy System Management.

External drivers

- > Regulatory Compliance.
- > Customers.
- > Competition.

Objectives are broken down into Business, Technology, and Operations:

Business

- > Reduce time to market

The drivers are fairly universal and can easily be applied to the Component Content Management System market.

The CCMS Evolution

There has been a similar evolution of Component Content Management Systems since 2005.

- > The early adopters relied on in-house database systems, or even file management systems, to manage their DITA content, but these were not always up to the task.
- > There was soon a move to source code systems such as SourceSafe which support modular content and keep track of versions very well.
- > Early on-premise Component Content Management Systems followed, and while these provided better and specific DITA support, they did so using different approaches.
- > The CCMS vendors picked up on a more general move towards SaaS, and a number of cloud-based systems began to appear.
- > We are now seeing much more flexible and powerful solutions that can be integrated with other 3rd party systems to build complex solutions.

- > Improve compliance
- > Generate sales opportunities
- > Enhance flexibility
- > Consistent multi-channel experience

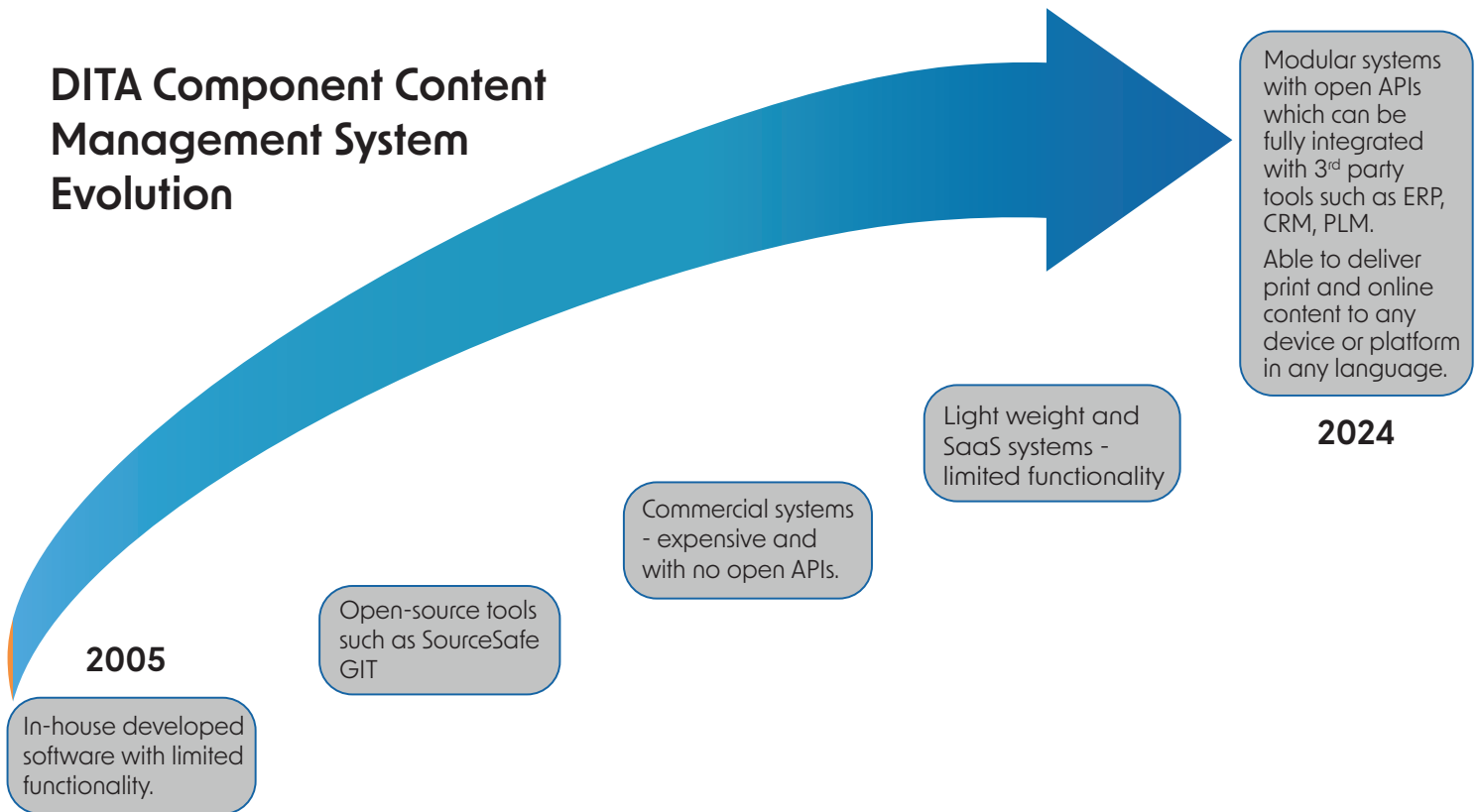
Technology

- > Optimize costs
- > Reduce maintenance costs with legacy systems
- > SOA
- > Build multi-channel capability

Operations

- > Streamline processes
- > Increase interoperability
- > Eliminate manual operations
- > Enable out-sourcing of non-core operations

DITA Component Content Management System Evolution



Why should you consider a new CCMS?

It may not be necessary to change your CCMS, but that doesn't prevent you from carrying out a sanity check. You should break this down into the following areas:

Current performance

- > It is very likely that your needs have changed since the original implementation. Can your current CCMS support the way you want to work, or are you finding that you have to work a certain way because of the CCMS? Is the CCMS directing how you work? Are you forced to use 'work-arounds'?

The future

- > Can it meet your known future needs? When it was deployed, your CCMS delivered what was required, but can it support your future needs? Are you aware of upcoming content/information demands that cannot be easily fulfilled? For example, can you easily push content directly into your Customer Portal?

Support

- > Are you receiving the desired level of support? Is the level of support satisfactory, or are you finding it harder to resolve problems?

Cost

- > Is it cost-effective? Component Content Management Systems' cost varies considerably, possibly by more than can be justified.

If you've answered No to any of the questions above, then you need to be sure you've got the right system now and aren't paying more than you should for a system that isn't fully delivering. It's time to dig a little deeper and follow the following steps.

Step 1 – Remember you've already done the hard work!

Changing a CCMS is a much simpler task than choosing one in the first place. One of the biggest obstacles to IT projects is getting buy-in from senior management. This is particularly true where you are working with soft return on investment figures. You know DITA and a CCMS is going to make life easier for you, but it can be hard to nail down solid financials to back this up.

But this has already been achieved; your company is already spending a certain amount of money, and the replacement system may be less expensive.

- > Also, now you fully understand DITA and your use cases.
- > You know where your current system fails to deliver and where your pain points are; therefore, you know exactly what you need.

However, before you start, measure your current system and record metrics that you can compare an alternative system against.

- > How long does it take to do the things that do work well in your current system?

Step 2 – Build your requirements and business case

If you are going to explore potential replacements for your current CCMS, first break your requirements down into areas, follow the banking example, for example:

Business

What are the business objectives and what can be achieved with change?

- > Reduce time to create content.
 - > Is time an issue with your current system?
- > Improve compliance.
 - > Are there concerns about compliance with your current system?
- > Generate sales opportunities.
 - > Can better content, delivered more intelligently increase sales. This will be linked to a customer/prospect portal; if you don't already have one, now is the time to add this technology to your toolset.

- > Better reporting.
 - > Could the reporting capabilities of your current system be improved? Are you able to build custom reports etc.?
- > Consistent multi-channel experience.
 - > Are you delivering a consistent content/document experience for your customers, prospects, partners, and internal staff?

Technology

What will/could be the technology impact derived from a change of system?

- > Optimize costs.
 - > Can ongoing costs be reduced?
- > Reduce maintenance costs with legacy systems.
 - > Can a new system remove the need for some legacy systems? This is particularly relevant if you are storing legacy files - can these be supported by the new tools?
- > SOA.
 - > Will a move to SOA create tangible benefits for your organization?
- > Build multi-channel capability.
 - > Does your current system fully support multi-channel delivery? Do you need more/better control in this area?
- > Integrate with other systems.
 - > Can you leverage advantages by integrating your replacement CCMS with your other systems? What will be the benefits of this?

Operations

What are the achievable operations gains from a CCMS change? What can your new system deliver that your existing one can't?

- > Streamline processes.
 - > Can you improve your processes? This may come from system integrations not possible with your current tool.
- > Better control of localization.
 - > Control over localization varies across the CCMS marketplace, is this a weakness in your system?
- > Improve collaboration.
 - > Collaboration with subject matter experts can be ineffective and time-consuming with some older CCMS. Are you relying on PDF markup? If so, this is a definite area for improvement.
- > Eliminate manual operations.
 - > Can you introduce more automation to your processes? This could be automatically creating simultaneous publishing outputs in multiple languages.

- > Enable SMEs to create structured content.
 - > Could your subject matter experts create usable content rather than sending written notes and MS Word documents? What would be the impact of this?
- > Publish to new platforms.

Step 3 – Set your strategic Goals

You should set some strategic goals or objectives, these may be related to:

- > Market Share.
 - > Can improved documentation and user experience increase your market share? Deploying modern portal technology can definitely make content easier to find and improve the user experience.
- > Product Portfolio.
 - > Is there a desire to increase the product portfolio or create new document types?
- > Customer Base.
 - > Can you show an increase in sales and attribute it to improvements in documentation? You will need to have metrics that fully detail the current use of your content by both internal and external users. This will include web analytics covering bounce rates, time on site, etc.
- > Operating Cost.
 - > Is it important that the new system has a lower cost?

Step 4 – Develop your Use Cases

The Use Cases you developed when you selected your current CCMS are still relevant, but now that you have a greater understanding of DITA, structured content, and your own specific needs, you must revisit them and add new ones.

You should also list 'desired' features, functions, and capabilities, not just for the authoring team but for anyone who will interact with your content.

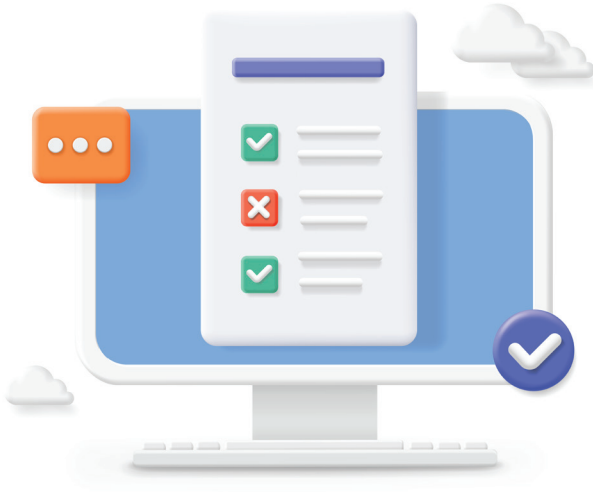
Step 5 – Measure your existing system

You should capture metrics from your current system, this will give you figures with which to evaluate a new system. These should cover things that work well within your current system and those that don't.

Step 6 – Talk to potential vendors

With a clear understanding of your needs it is now time to have open and honest conversations with other CCMS Vendors. Explain exactly what your issues are, what you want to achieve, and importantly share your budget. Many people are reluctant to talk openly about costs, but honesty in this area will save everybody involved a great deal of time.

Step 7 – Test an alternative



Having carried out your research, now is the time to test an alternative system/systems; it is also an excellent opportunity to see how portable your content is. Although DITA, in its purest form, is entirely portable, many CCMS add additional content to the DITA to support functionality within the system.

Share your Use Cases with the new Vendor. They should provide a sandbox environment and sufficient training on their system so that you can test it.

Use a MoSCoW scoring system and evaluate the results against your current system.

- > **M**ust have.
- > **S**hould have.
- > **C**ould have.
- > **W**ill not have.

The scoring will help if you are evaluating two alternative systems.

Conclusion

Now may be the ideal time to assess your Component Content Management System's suitability and to evaluate alternative solutions from other vendors. But before making any decision to change major IT systems, companies should conduct a thorough analysis, considering factors such as cost-benefit analysis, potential disruptions, and the impact on employees and customers. A well-planned transition strategy minimizes risks and ensures a smooth migration process.

About the author

As the EMEA Sales and Marketing Director for Bluestream Database Software Corp, Rik champions strategic initiatives to deliver effective results, and enjoys assisting with critical decision-making while working with cross-functional teams to manage change and produce service excellence. As a document/component content management expert, he regularly presents at events and conferences throughout Europe and North America, promoting new ideas and emerging technologies.

Away from the structured content world Rik has worked with banks and other financial institutions helping to develop data capture, archiving, and compliance solutions.