

# Enterprise Procedures Practice: Recommendations and Roadmap

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For the Xenia Corporation

Prepared by PRECISION CONTENT AUTHORIZING SOLUTIONS INC.



**DEMO**

This report has been redacted and is for  
demonstration purposes only.

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## Current state report on Xenia's DITA solution

### What does success look like?

*Building out the program through iterative process improvement.*

Several complementary objectives of the health check project were examined to gauge the progress and build a roadmap to extend the reach of the Enterprise Procedures practice within Xenia. These include

- scalability
- sustainability, and
- effectiveness of the solution.

### Comparison to industry

Understanding how the Xenia program compares to industry will help Xenia pace improvements and develop a firmer picture of success.

### Holding its ground

As the program rolls out to other areas of Xenia, the Knowledge Management group needs to assess and validate its approach with the Enterprise Procedures practice. Knowledge Management is not seeking to be on the bleeding edge of technology except where it is justified to meet strategic objectives.

### Report methodology

Precision Content Authoring Solutions Inc. (PCAS) has been tasked with

- conducting interviews
- reviewing policies and project documentation
- researching industry practices, and
- formulating recommendations.

## Stakeholder interview summary

### Introduction

Through a series of meetings with stakeholders, PCAS has reached several key conclusions on the current state of the Enterprise Procedures practice at Xenia.

### Stakeholder interviews

PCAS has spent roughly one-third of the project timeline interviewing and summarizing discussions with 21 Xenia stakeholders, both onsite and offsite.

### Xenia stakeholders included

*REMOVED*

### Overall health

The general consensus of stakeholders is that the Enterprise Procedures practice is a success and meets with expectations. There are issues with production that are to be expected with a complex content management solution that are being addressed. The key area hampering the ongoing success of the program appears to be with the Component Content Management System (CCMS), DITA Exchange.

### Future health

Stakeholders have expressed concerns about the future health of the program if certain issues are not addressed before new teams are brought into production with the Enterprise Procedures practice. The main areas of concern for future health include

- Data governance
- Content standards
- Content management technology, and
- Portal publishing.

### Summary of risk factors

The following risk factors and impact are summarized by area below. Future risk describes the impact of the status quo if nothing is done to mitigate the risk.

Area	Factors	Current Risk	Future Risk
Process	Enterprise Procedures	Managed	Moderate
	Data Governance	Moderate	High
	Knowledge Management	Low	Low
	Content standards	Moderate	High
Technology	Content management system	High	Very High
	Technology support	Managed	Moderate
	GuideWire integration	Low	Low
Publishing	Metadata	Managed	Moderate
	Portal publishing	Moderate	High
Migration	AutoGuide		Moderate

## Process risk factors and recommendations

Process risk factors are summarized from interviews with internal stakeholders and observations. These factors include

- Enterprise Procedures
- Data Governance
- Knowledge Management, and
- Content standards.

### Risk factors for Enterprise Procedures practice

The following elements should be addressed to reduce program risk:

- A considerable amount of unique knowledge and responsibility is concentrated with the Enterprise Procedures practice lead.
- Tool workarounds are very time consuming.
- Lack of up to date process, training, and standards documentation.
- Lack of time and resources to conduct user acceptance testing on updates to the EP software.

### Current Risk – Managed

Claims procedure analysts are relatively self-sufficient that they could work around a short-term absence of the practice lead.

### Future Risk – Moderate

Expanding the amount of content and number of users will place a considerable strain on the program without additional resources.

### Risk factors for Data Governance

The following elements should be addressed to reduce program risk:

- While Data Governance has a clear mandate to oversee EP, there are no policies or standards currently under its control.
- There is no clear escalation path to establish or transfer ownership content to the rightful owners.
- There are no records management practices in place to govern the lifecycle of Enterprise Procedures. There is confusion around archival processes and policies for Enterprise Procedures.
- Change request process is cumbersome, discouraging voluntary participation in the cleanup and corrections to Enterprise Procedures.
- There is a remarkable amount of duplication of content both within the EP source repository and across other content repositories.
- There is an acknowledged lack of content strategy to help guide future growth of the EP solution.

### Current Risk Moderate

Lack of consensus on content standards will lead to significant deviations in the writing which will have an impact on the effectiveness of the architecture.

### Future Risk High

Duplicate content must be removed and managed. Bringing on new teams into the Enterprise Procedures practice will be difficult without established standards.

### Risk factors for Knowledge Management

While there are no identified risks, there are missed opportunities including

- Better communication and change management strategy is needed to effectively communicate knowledge management initiatives and goals.
- Lack of baseline usability data for claims users makes it difficult to sell the investment in the changes for Enterprise procedures. Need baseline data for brokers to develop the powerful story once the new AutoGuide is rolled out.
- Create and promote a brand for Enterprise Procedures that is independent of the tools or technology so that issues or perceptions with the technology do not drag down the program.
- Better access to Precision Content® training for others that are contributing content, or reviewing content, should make collaboration easier for the procedure analysts.

### Opportunity

Promoting/marketing a compelling vision of the future of Enterprise Procedures will help to facilitate change.

### Risk factors for content standards

The following elements should be addressed to reduce program risk:

- No defined competency model for authors. There needs to be initial and recurrent training with evaluation for all roles involved in content creation.
- Lack of enforced content or coding standards for authors.
- No means of audit or “compliance to baseline” for content.

### Current Risk – Moderate

Over time, content standards will start to drift if they are not enforced. Manager is currently mitigating the risk by providing an editorial check of content.

### Future Risk – High

As other teams come online, they will be forced to follow conventions that have drifted from the standards making it difficult to recover. These teams will be forced to accept compromises that affect the intended architecture.

### Recommended process improvements

The following elements are a summary of recommendations to mitigate risks:

1. Expand the Enterprise Procedures practice to include roles for
  - DITA architect
  - Precision Content® expert, and
  - content management specialist.
2. Develop a comprehensive content strategy under the custody of Knowledge Management to guide development of
  - policies
  - standards, and
  - technology requirements.
3. Develop policies and standards documents for Enterprise Procedures under the custody of Data Governance including
  - Enterprise Procedure policies
  - content standards, and
  - coding standards.
4. Institute controlled documentation processes for Enterprise Procedures
  - Register all topics and controlled documents prior to authoring.
  - Institute automated workflow for change requests and approvals.
  - Maintain an active inventory of all controlled content.
  - Isolate all controlled content from uncontrolled content on the Hub.



5. Develop alternative channels for publishing content to reduce the need for other business units to rely on their own content such as
  - “need to know” bulletins
  - tutorials
  - job aids, and
  - work tools.
6. Create publishing prototypes that can illustrate the value of XML publishing.
7. Certify an internal Precision Content® instructor to run training and workshops for procedure analysts, subject matter experts, and others.
8. Develop usability testing for users and authors to measure improvements to performance at various program milestones.
9. Continue to develop and foster the community of practice for authors to share successes and discuss challenges. Select and enter work into the STC Publication Competition or insurance trade associations every year.
10. Consider committing Information Services to migrating to the Enterprise Procedure platform for its key policy, procedure, and strategy documents.
11. Investigate integration opportunities for Enterprise Procedures with Policy Center.

## Enterprise Procedures roadmap

This roadmap is an ever-evolving document that will form the basis for a comprehensive content strategy. In its current state, it provides key activities and prioritization based upon observations, analysis of stakeholder interviews, and recommendations from Precision Content Authoring Solutions Inc..

### Vision

If the goal of content strategy is to “get the right information into the hands of the right people at the right time”, then the vision for the Enterprise Procedures practice should be to deliver quality, context-sensitive content to Claims and Insurance personnel directly from Xenia’s custom GuideWire products. This level of integration would permit the elimination of other sources of information that conflict with EP content.

By the time that Driver Licensing Services is ready to deploy on the EP platform, the practice should have effective content collaboration with Communications and HR to be able to deploy up to date, usable, quality content directly to Xenia clients on Xenia.com, mobile platforms, and print products.

### Roadmap

The following stages describe the journey to fully evolve the maturity and return on investment for the Enterprise Procedures Practice at Xenia.

Stage	Description	Activities
1	Fix review workflow	<ul style="list-style-type: none"> <li>Evaluate options for review (build/buy)</li> <li>Develop review workflow solution</li> <li>Train users in workflow and deploy</li> </ul>
2	Foundational planning	<ul style="list-style-type: none"> <li>Develop content strategy</li> <li>Fill EP writer/trainer/editor role</li> <li>Migrate EP documentation to EP platform and deploy on the Hub               <ul style="list-style-type: none"> <li>Develop enterprise policies</li> <li>Update content standards</li> <li>Develop coding standards</li> <li>Develop competency model</li> <li>Develop editorial checklists</li> <li>Develop communications strategy</li> </ul> </li> <li>Integrate DITA OT into publishing chain</li> <li>Re-evaluate CCMS requirements</li> </ul>
3	Rebuild on new platform	<ul style="list-style-type: none"> <li>Tender for new CCMS</li> <li>Revisit DITA architecture and refactor</li> <li>Develop workflows and metadata</li> <li>Conduct content inventory analysis</li> <li>Migrate AutoGuide content to new platform</li> </ul>
4	Evolve practice	<ul style="list-style-type: none"> <li>Implement document control measures</li> <li>Migrate key EIM documentation to EP platform</li> <li>Develop controlled document look and feel for the Hub</li> <li>Explore Policy Center integration</li> <li>Fill content management specialist role</li> <li>Certify trainer to deliver Precision Content® training</li> </ul>

Enterprise Procedures Practice: Recommendations and Roadmap

Stage	Description	Activities
5	Develop core technical capabilities	<ul style="list-style-type: none"> <li>• Fill DITA specialist role                             <ul style="list-style-type: none"> <li>• Develop publishing prototypes</li> <li>• Develop history of change solution</li> <li>• Develop bulletins solution</li> <li>• Develop HTML5 solution</li> </ul> </li> <li>• Explore integration with training documentation</li> <li>• Migrate Claims content to new platform</li> <li>• Explore BGA integration</li> </ul>
6	Deploy AutoGuide content	<ul style="list-style-type: none"> <li>• Develop Context-Sensitive Online Help for Policy Center</li> <li>• Develop Context-Sensitive Online Help for Claims Center</li> </ul>
7	Deploy Driver Licensing content	<ul style="list-style-type: none"> <li>• Onboard Driver Licensing Services</li> <li>• Explore integration with Communications</li> <li>• Publish to Xenia.com</li> </ul>