

Making the Transition to DITA as Painless as Possible: DITA Change Management Tips

Keith Schengili-Roberts, Market Researcher IXIASOFT



Agenda

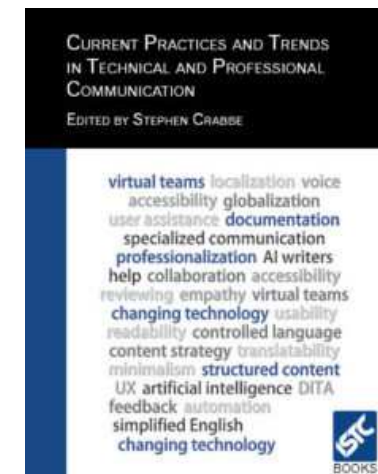
- Introduction / Audience
- Typical Reasons for Choosing DITA
- Change Management and Managing Change
- Easing the Transition
- Q/A



Who's This Guy?

Keith Schengili-Roberts

- Working in Tech Comm since early 1990s
- Working with DITA since 2004
- Write an industry blog:
DITAWriter.com
- Market Researcher and DITA Evangelist for IXIASOFT
- Author of four technical titles, contributor to recently-released *Current Practices and Trends in Technical Communication*





OASIS DITA Adoption TC

- Am also the Chair of OASIS DITA Adoption Committee
- Goal: to educate the global marketplace on the value of DITA for document creation and management
- We have an extensive series of whitepapers on DITA Best Practices: www.oasis-open.org/committees/tc_home.php?wg_abbrev=dita-adoption#expository (or goo.gl/F86xLX)
- This presentation borrows some ideas from “Roles and Responsibilities of a DITA Adoption” DITA Adoption whitepaper by Deb Bissantz and Jacquie Samuels

An OASIS DITA Adoption Technical Committee Publication

DITA 1.2 Feature Article:
Roles and Responsibilities of a DITA Adoption

Author: Deb Bissantz and Jacquie Samuels
On behalf of the DITA Adoption Technical Committee

Date: 4 September 2013



Audience for this Presentation

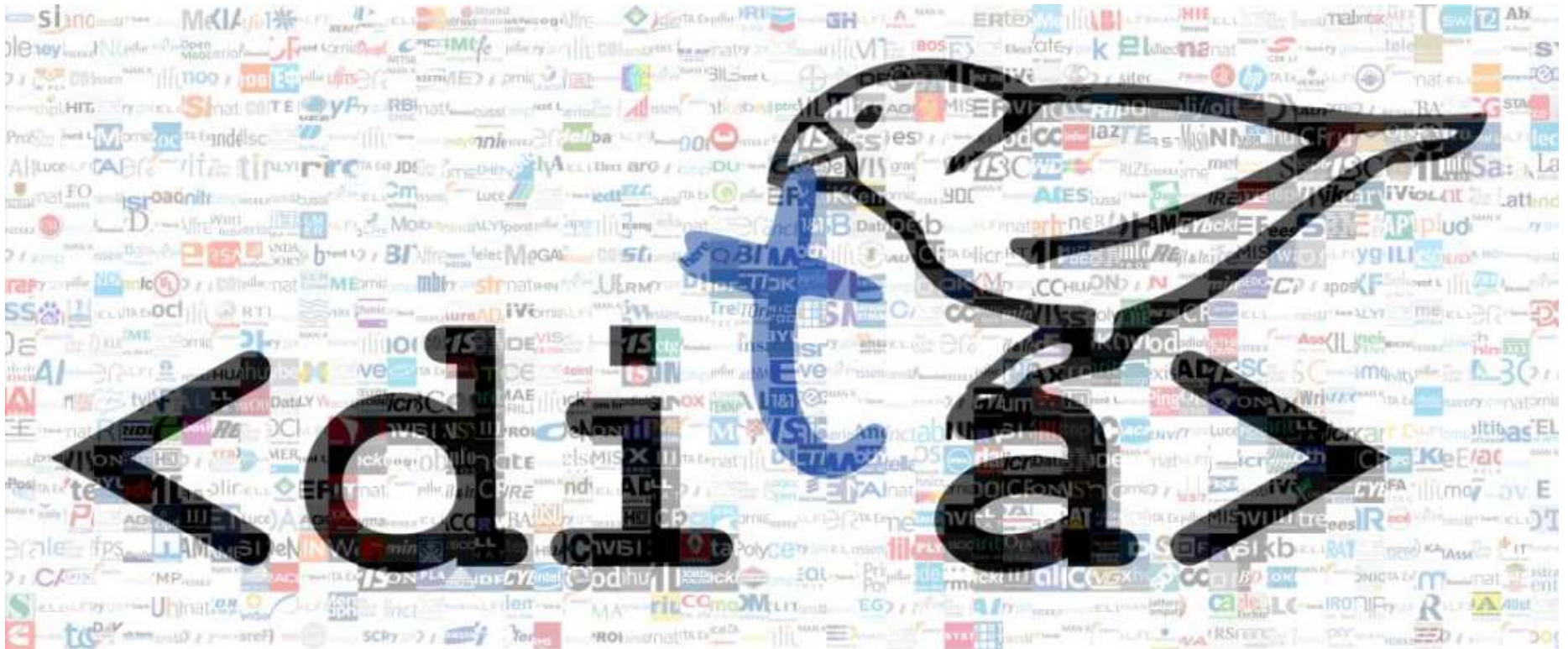
You are:

- Already familiar with DITA (i.e. you know what it is)
- A technical documentation manager, information architect, content strategist or basically the person who is/will be put in charge of moving to DITA
- Interested in knowing what to expect, and how to prep for the change





Typical Reasons for Choosing DITA

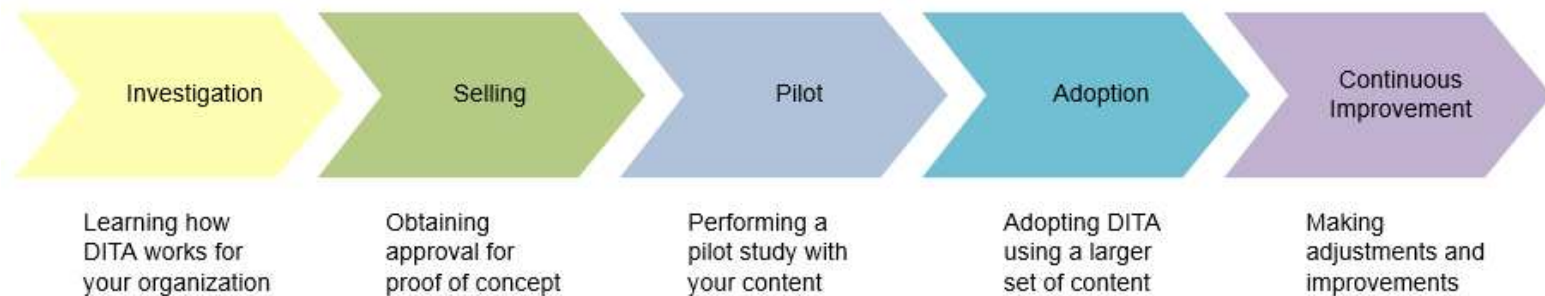


...by the way, you are in good company
Most recent count: 691 firms worldwide.



The DITA Adoption Process from Beginning to End

1. **Investigation:** Learning about how DITA adoption would work for your content, users, and company.
2. **Selling:** Requesting and obtaining approval to perform a pilot or proof of concept.
3. **Pilot:** Performing the pilot with a sub-set of content.
4. **Adoption:** Adopting the process using a larger set of content.
5. **Continuous Improvement:** Making adjustments and improvements on an ongoing basis.





Why Move to DITA?

These are the pain points I have most often seen in doc teams motivating their move to DITA:

1. The need to reduce operational costs
2. A requirement to decrease localization costs
3. A need to improve content quality
4. The company has moved to Agile (and the doc team needs too as well), and DITA enables Agile processes for documentation



Some Non-budgetary Reasons for Moving to DITA

- Any of the previous scenarios make for a good *budgetary* argument to move to DITA
- Some teams are also swayed by how best practices are incorporated into DITA
 - Content reuse = consistent messaging
 - DITA metadata promotes findability = better SEO (slideshare.net/IXIASOFT/dita-and-seo)
 - Topic-based content easier for users to digest
 - Multi-channel publishing built-in





Requirement to Verify Content Before Publication

- In regulated environments such as in the medical device sector, content must first be vetted by medical professionals
- Similar requirements in other sectors, such as legal publishing, heavy manufacturing, etc.





Separation of Form from Content

- In a study I did prior to moving to DITA at AMD, found that fully half of the time spent using DTP software was on formatting content
- Suggests considerable time savings, making content creators more nimble and able to concentrate on making additional content
 - From a localization perspective, also removes DTP charges from Localization Service Providers

Less
Time
Spent
Formatting



Have Outgrown Current Toolset

- Traditional Desktop Publishing tools cannot cope with growing need to produce content
- Hard for writers to find existing material for reuse in file folders or existing repositories
- Pressing need to automate existing processes
- Seeking a more mature process
- Organizationally-siloed content needs to end: bring outside writers over to a common toolset based on DITA
- Waterfall processes need to migrate to Agile methodologies; DITA is proven here





This is an Opportunity to Improve Your Processes

- You can make your technical writing team more efficient, more cost-effective and robust; remove the barnacles from your existing processes
- Examine how you are doing things now, and look at what needs improving:
 - Is your content edited/verified before it goes out the door?
 - Do you have a single unifying look-and-feel for your publications?
 - Are you matching the cadence of product releases, or are you a release behind?
 - Have you automated the processes that can be?
 - Are there new ways you would like to work with your users?





Upfront Costs vs. Opportunity Costs

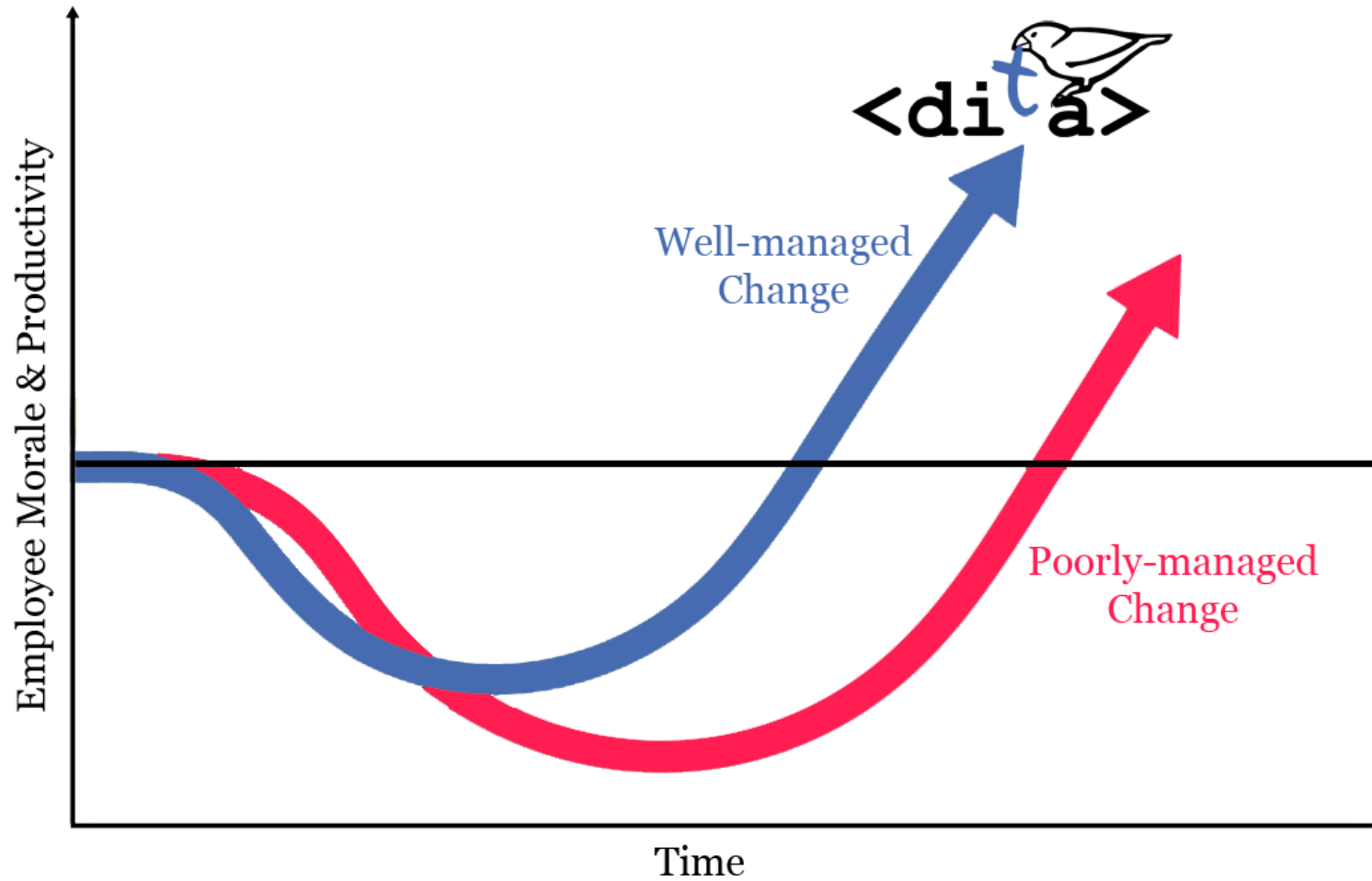
- Yes, there are often significant costs associated with moving to DITA and possibly purchasing a DITA CCMS:
 - Conversion costs of legacy content
 - Change management
 - Cost of XML editors + CCMS software
 - Consultation fees
- Ask yourself: can your organization support the ongoing costs of current toolchain?
 - This is an opportunity for change and improvement...



**OPPORTUNITY
COST**



Change Management and Managing Change





Change Management is a Well-known Issue

- Change management is a long-studied issue
 - Some of what I will talk about is generally applicable regardless of circumstance
 - Yes, there is even a professional organization of management professionals dedicated to this issue: www.acmpglobal.org
- There are aspects of this that are specific to technical communications groups, and more specifically to those moving to DITA:
 - Fundamental shift from unstructured to structured content
 - An opportunity to improve existing processes
 - Reduce costs, and genuinely do more with less





Managing Change: The Basics and Your Role in It

- Any significant change in the way people do their work requires a fundamental shift in the ways that people think, interact, and work
- As the likely co-ordinator/champion of the process change, getting through this paradigm shift effectively requires understanding what to expect and how to come through it intact





Identify the Pain, Issues, and Consequences

- People are unwilling to change unless there is a very good reason for that change and they can see the benefits
- Understanding possible benefits means first identifying the existing pains, issues, and consequences
- What are the real issues facing your organization? What is the impact/cost of *not* addressing these issues?
- Create a compelling vision and get your team excited about moving away from current pain to future gain



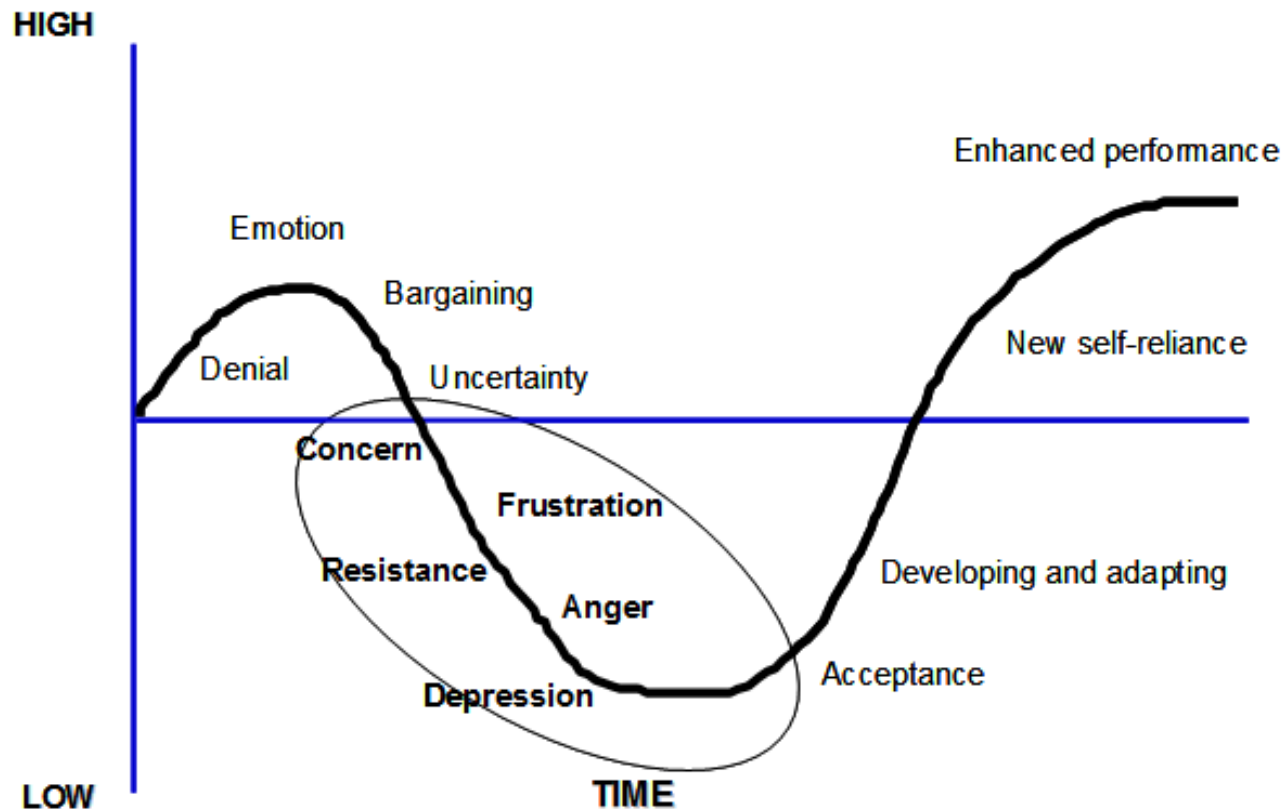
Understand existing pains first!



It is important to set a vision for change



Expect an Initial Productivity Dip



Adapted from Hopson & Adams

- Anticipate the emotions you will encounter ahead of time and develop strategies to adapt
- Your challenge is to make this inevitable dip as small and short as possible



Reach Out and Listen

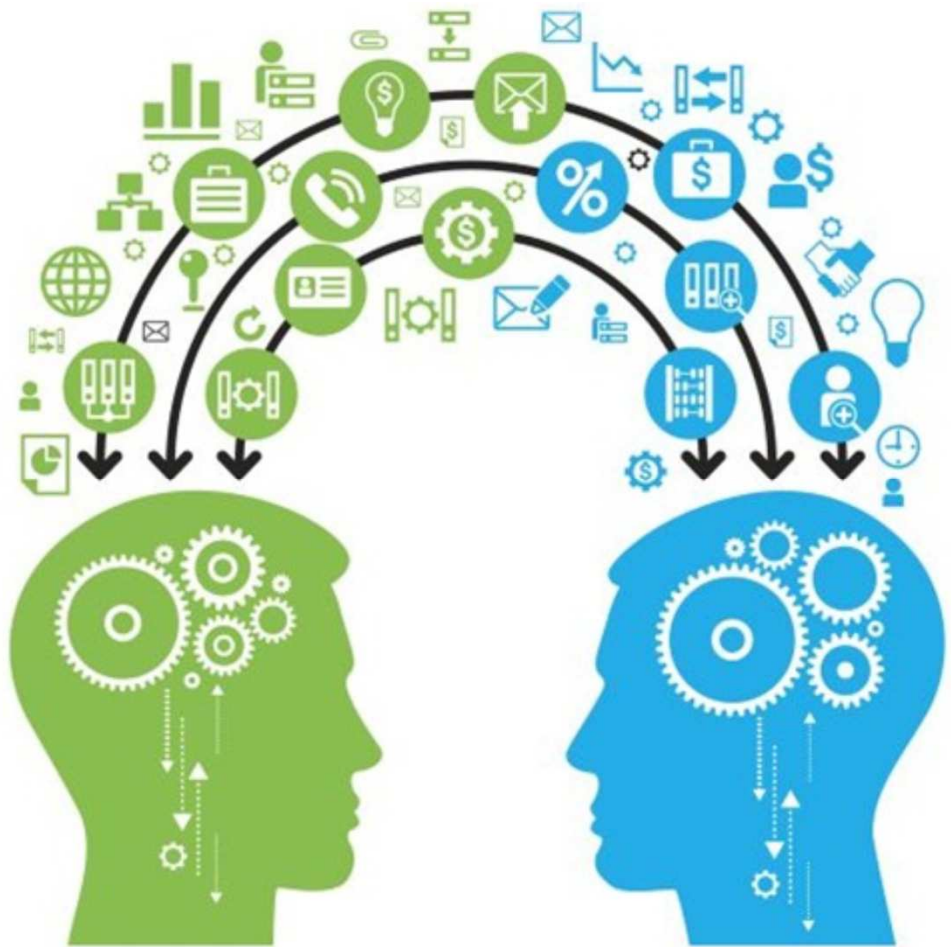
- Listen to what people have to say about the issues and the solutions.
- If you involve people early on, really listen to what they have to say, and then demonstrate that you are addressing their concerns/requirements. These people may end up becoming your strongest supporters.





Communicate!

- Explain why the change is happening
- Describe the plan
- Provide ongoing status updates
- Celebrate successes
- Do not downplay problems
- But in the end: communicate, communicate, communicate!





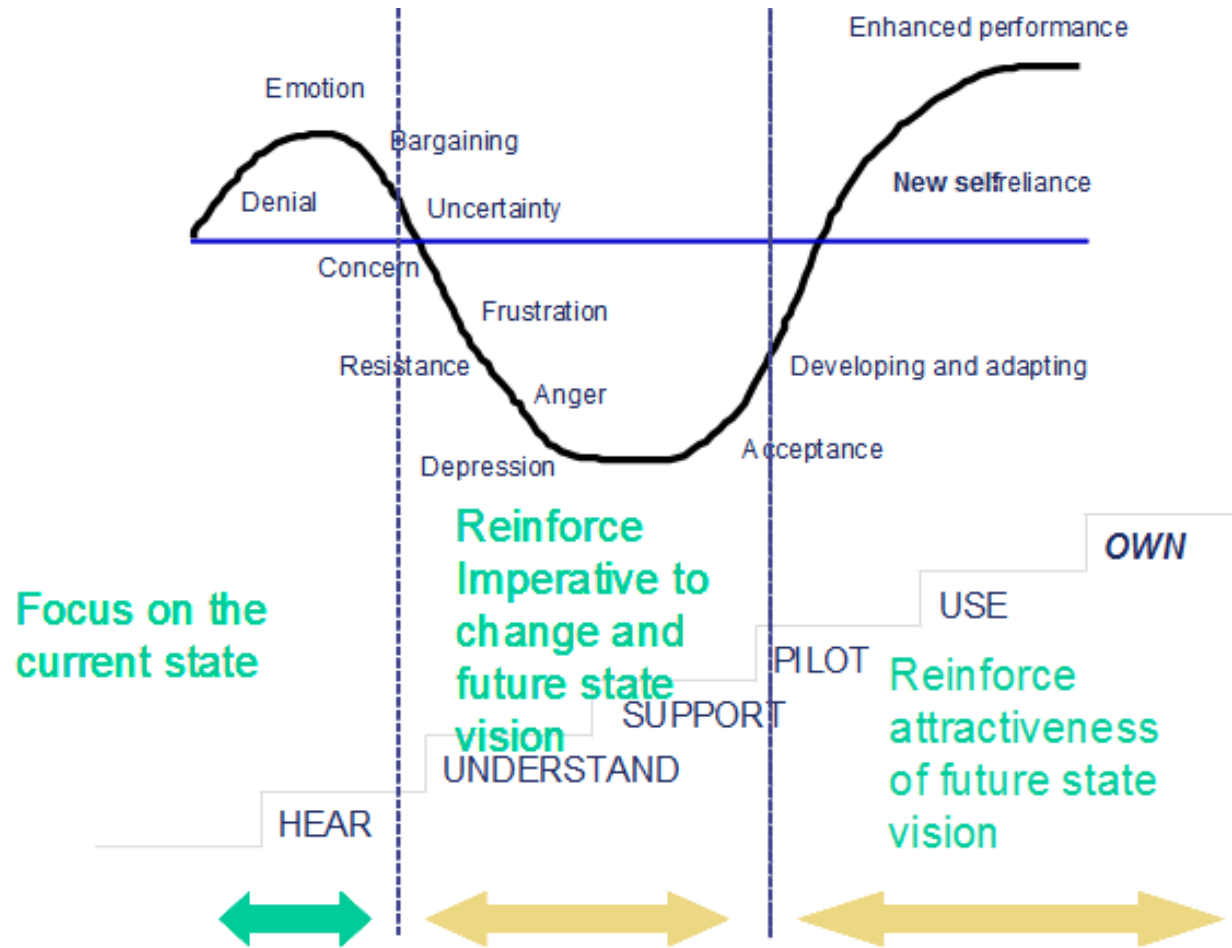
Overcoming Resistance

Typical criticisms/comments:

- “We’ve always done things the old way and it worked fine.”
- Loss of creativity
- “There are benefits to doing things the new way, but this is too much work.”
- “If fewer people can do more work, I may lose my job.”
- You need to meet these types of criticisms head on, always emphasizing the reason and eventual goals for making the change



Intervention Stages in Change Management



Adapted from PKF presentation on Change Management



Why Some Projects Fail

- Unrealistic expectations are set
- Resistance to change
- Failure to address both technical and non-technical issues
- Failure to recognize that analysis and design take time
- Lack of a champion
- Biting off more than you can chew
- Economic issues
- Organizations lack core competencies
- Lack of communication
- Failure to involve others
- Relying on only one type of reuse
- Project-by-project reuse
- Selecting the wrong first project
- Reuse everything you can
- No facility for change
- Project is not resourced properly



Changing Roles / New Hires

- Expect to find new supporting roles for members of your team, such as:
 - DITA Information Architect/Content Strategist
 - XSL Stylesheet/Publishing Expert
 - Conversion Specialist
 - Trainer
 - Technical Editor
 - Content Management Specialist
- You might want to considering hiring someone with previous DITA expertise to help your team go through the change



Should You Hire a DITA Consultant?

- If your move to DITA involves areas in which you do not have expertise (XSL, localization processes, legacy content conversion) this is a good rationale for hiring a consultant
- Try not to do ombudsman consulting for *everything*, instead aim for tactical consulting services on specific issues
- A DITA consultant can do the following:
 - Help with ROI analysis and content audits
 - Provide insight on effective reuse/best practices
 - Help you decide on the right tools for your job
 - Avoid extra costs by guiding you down the correct path
 - Develop a content strategy
 - Aid in the conversion of legacy content





Return on Investment Considerations

- One of the most common mistakes I have seen are people who want to do an ROI analysis *having already moved to DITA* but have not established a baseline using the old toolchain
- Solution: establish a baseline for content production before you move to DITA
- Things you can consider measuring:
 - # of publications per quarter / year
 - # of localized publications per quarter / year
 - # of types of publications (i.e. User Manuals, Engineering Manuals, etc.)
 - Word count of existing publications



Easing the Transition

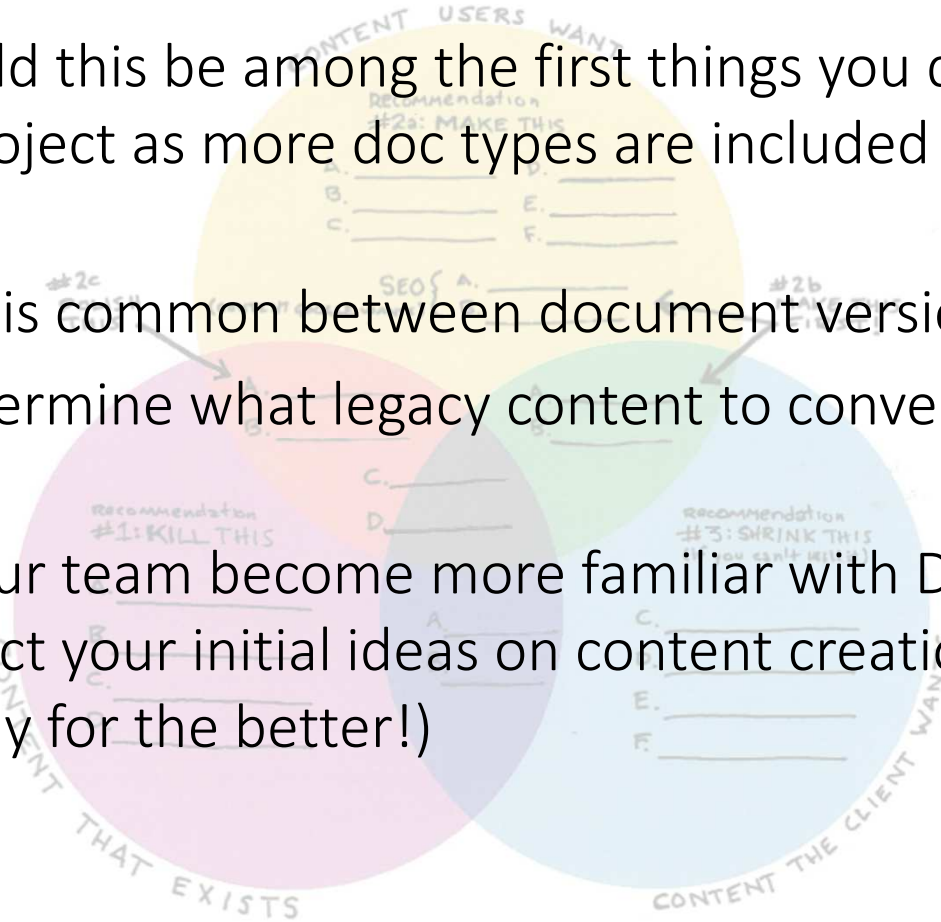




Easing the Transition: Do a Content Audit

CONTENT AUDIT TEMPLATE

- Not only should this be among the first things you do, but think of it as an ongoing project as more doc types are included in your migration efforts
- Look for what is common between document versions and types
- It helps to determine what legacy content to convert, and what to leave behind
- As you and your team become more familiar with DITA and its features, expect your initial ideas on content creation and migration to change (usually for the better!)



johnmccrory.com



Easing the Transition: Do a Content Audit (cont.)

- For the long-term assessment of your existing content, determine:
 - How much can be excised
 - How much can stay/be maintained in pre-DITA format with little effort
 - What content should be targeted as pilot, first-wave conversion, second-wave conversion, etc.



Easing the Transition: Do a Pilot Project!

- A preliminary check on whether a move to DITA is feasible for your team
 - A chance to see how your team (or select members) work within a new system
 - Any problems that turn up during the pilot can be anticipated and fixed prior to a full roll-out to the rest of the team
- Also a chance to put new tools (XML editor + CMS) through its paces, to see if they live up to their billing
 - A 30-day free trial is typical for this type of software, which is usually enough time for a pilot project



Easing the Transition: Assessing Your Team

- What you need to ask yourself:
 - What are the skill sets and character of the members of your team?
 - Do you have a critical mass of qualified people for the roles you need to fill?
 - Is anyone likely to leave? If so, how critical are their skills?
 - Can initiative survive without current executive backing (i.e. VP swap)?
- Depending on your answers, plan accordingly and begin to lay the groundwork to make a move to DITA possible
 - Flipside of this is: can you keep using the old toolchain and expense indefinitely?



Easing the Transition: Training!

- This may seem like an obvious thing (and it is) but I am continually surprised to find people who have had to learn it on their own
- Moving from unstructured to DITA is not simply a matter of changing tools, but the way your writers work with content
- Train your tech doc group on:
 - DITA fundamentals
 - Minimalism
 - CCMS and/or other new tools you will be using





Easing the Transition: Training! (cont.)

- Best solution: hire a firm to do on-site training of DITA
 - This does cost \$\$\$, but money is well-spent, as it improves adoption rates/shortens productivity dip, so is cost-effective
- Online training: check out learningDITA.com, or consider taking the “DITA Basics” course from CIDM



Learn DITA at your own pace. At no cost!



REGISTER 

DITA Basics – Online Course

Tuesdays October 3 – November 7, 2017: 9:00 am – 11:00 am PDT | 12:00 pm – 2:00 pm EDT | 5:00 pm – 7:00 pm BST

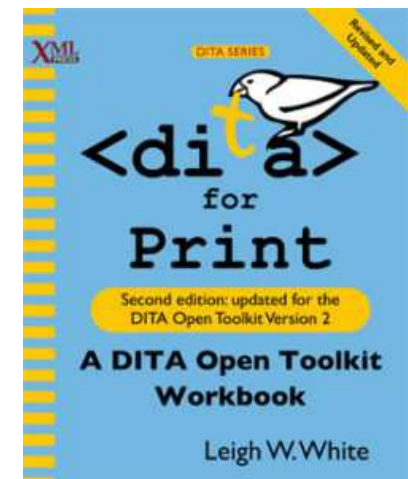
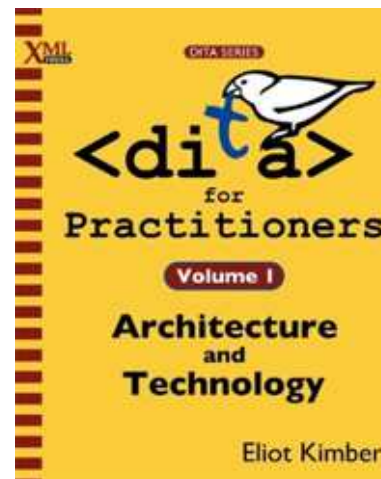
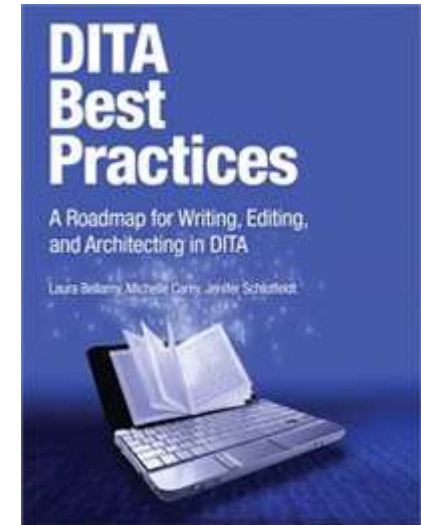
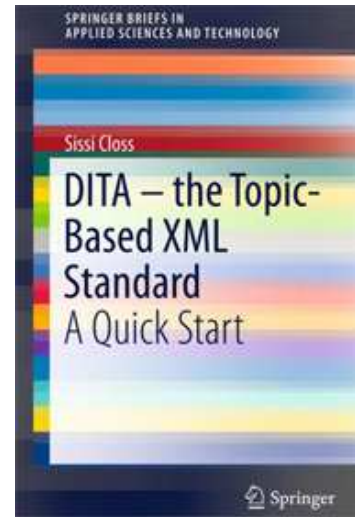
This 6 week online course provides a comprehensive overview of the DITA 1.3 standard, introducing the common information types and elements used to create technical documentation.



Easing the Transition: Add to Your Bookshelf

Recommend the following:

- *DITA: The Topic-Based XML Standard: A Quick Start*, by Sissi Closs
- *DITA Best Practices: A Roadmap for Writing, Editing, and Architecting in DITA* by Laura Bellamy, Michelle Carey, Jenifer Schlotfeldt
- *DITA for Practitioners Volume 1: Architecture and Technology*, by Eliot Kimber
- *DITA for Print: A DITA Open Toolkit Workbook, Second Edition*, by Leigh W. White





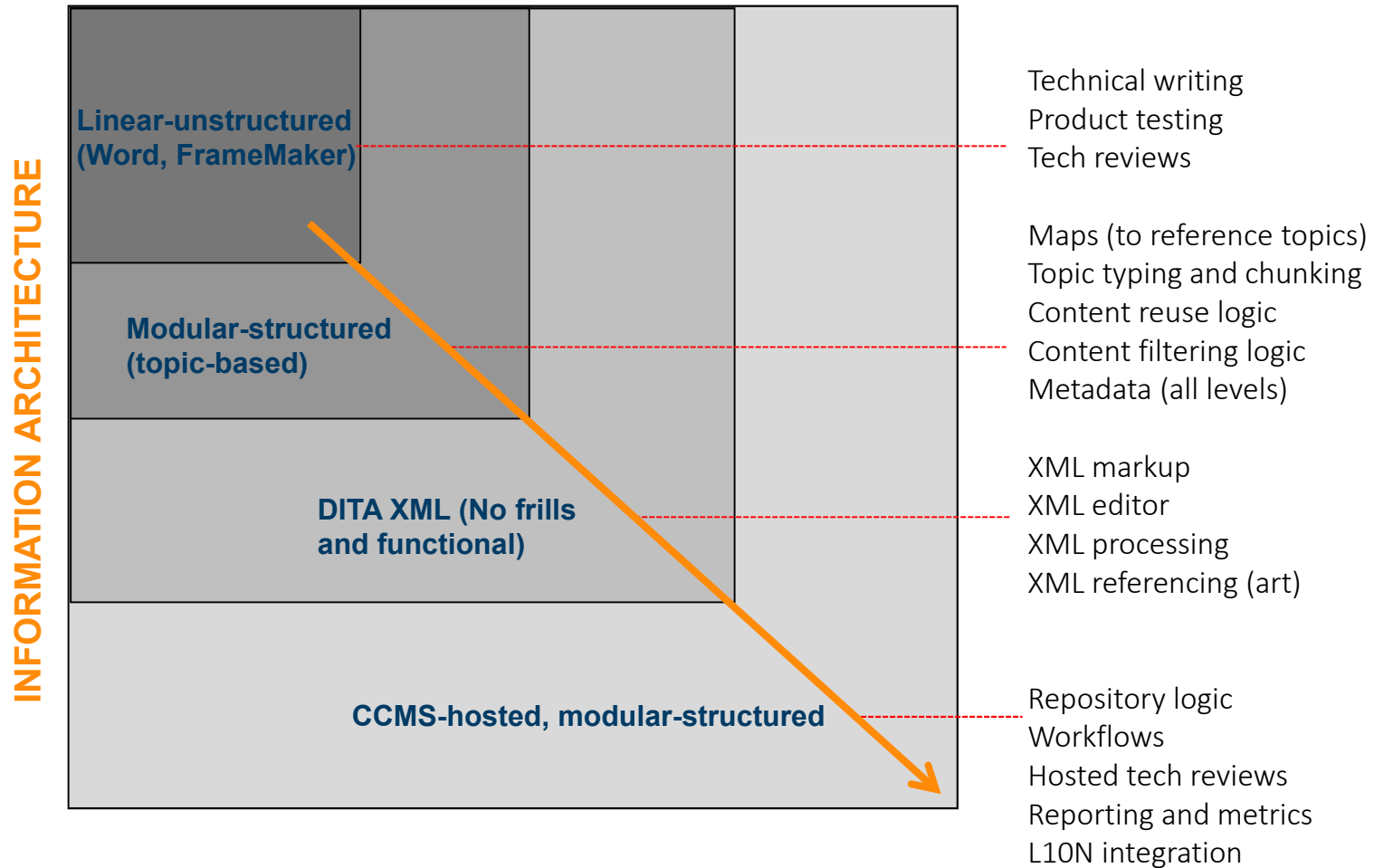
Easing the Transition: Choosing a Cut Over Time

- Plan the shift to DITA when you are least busy
 - For teams that do not have this luxury, consider moving to DITA on a per-publication basis, staggering the cut-over until the final publication to be converted is out the door
- Learn the lessons that came from your pilot project and apply them here
- Proven strategy: use old toolchain in parallel with DITA development for a set amount of time; 3-6 months
 - Expect an initial productivity drop as people use both toolchains, offset by a shallower productivity dip when you move to full DITA later



Information Architecture Migration Levels

SKILLS





Information Architecture Migration: Example

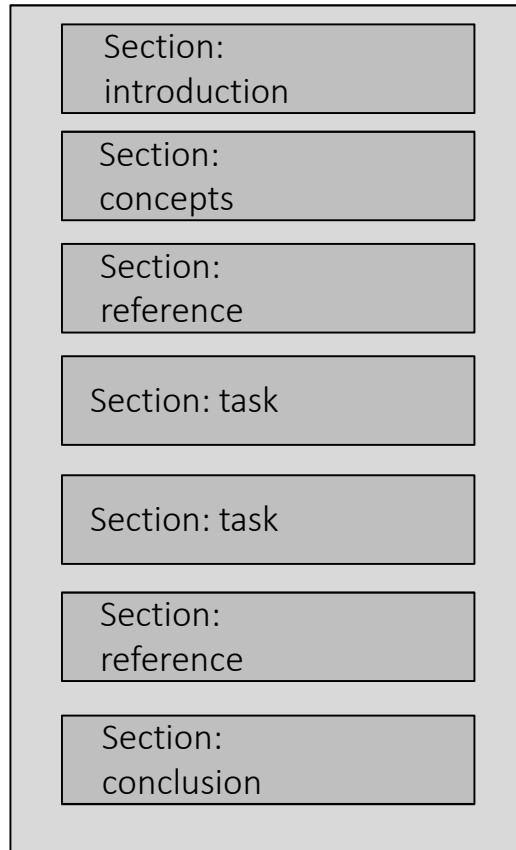
FrameMaker



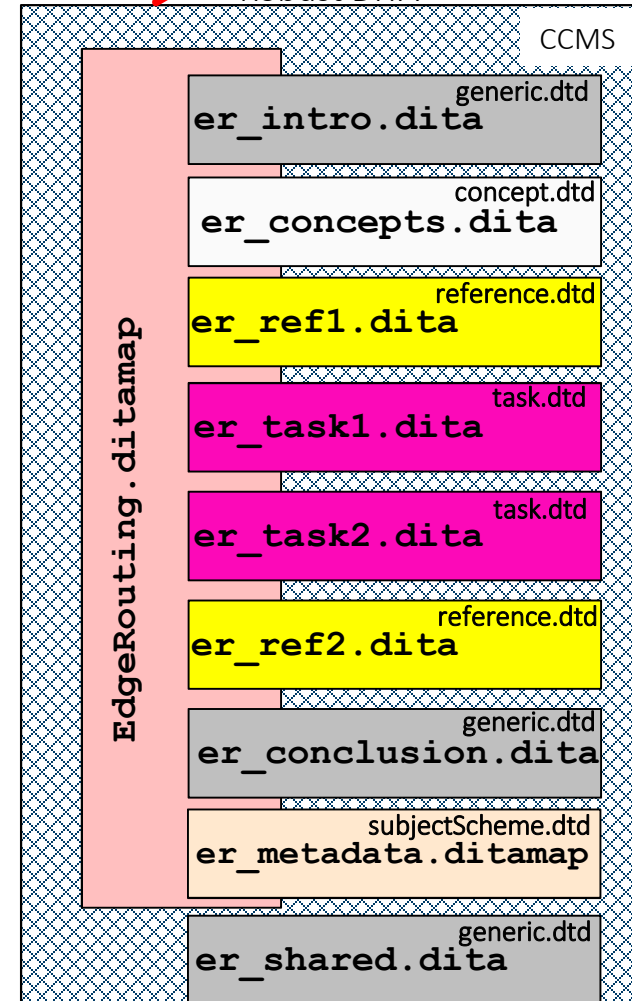
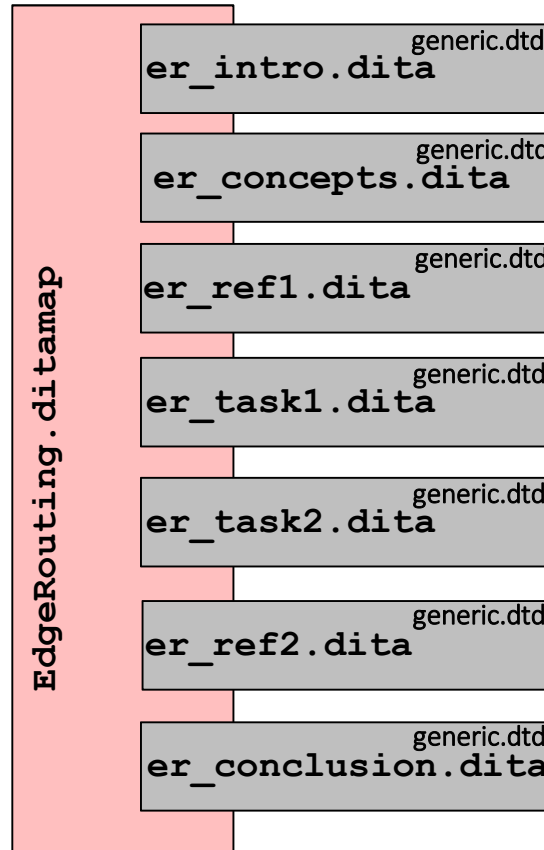
No-frills DITA



Robust DITA



EdgeRouting.fm





Easing the Transition: Find “Change Agents”

- The best way to convince people that a change is good is to have “one of their own” communicate the excitement and possibilities
- A “change agent” is someone who is not necessarily part of the assigned implementation team, but who will be a user of the new system and its methodologies
- If you have multiple teams, have at least one change agent per team
- Make sure that you help the change agents to prepare a consistent message to take back to their team. A consistent message reduces possible misinterpretations.



Easing the Transition: Find “Change Agents” (cont.)

- Prior to launching into full DITA, task your change agent with a relevant project:
 - Devise a DITA style guide (which tags/attributes to use, with examples)
 - Convert some sample content over to DITA
 - Ask them to train or mentor other members of the team on DITA / using XML editor or CCMS, etc.





DITA-based Documentation and The Road Ahead



- A move to DITA should be thought of as an opportunity to improve the quality of your content and your documentation processes
- Think of where you need to take your documentation team and what your users will expect of you five years from now



QA



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Blog: ixiasoft.com/en/news-and-events/blog

Twitter: @IXIASOFT (and @KeithIXIASOFT)

IXIASOFT DITA CMS Users LinkedIn group:

[linkedin.com/groups?gid=3820030](https://www.linkedin.com/groups?gid=3820030)

Member of OASIS DITA Technical Committee