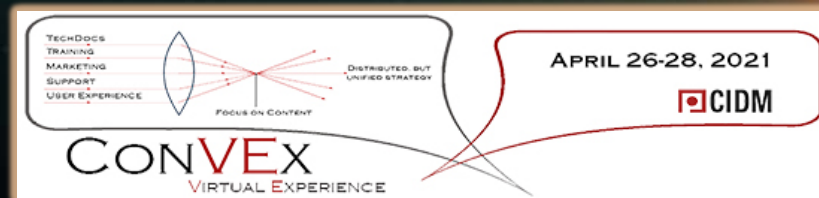


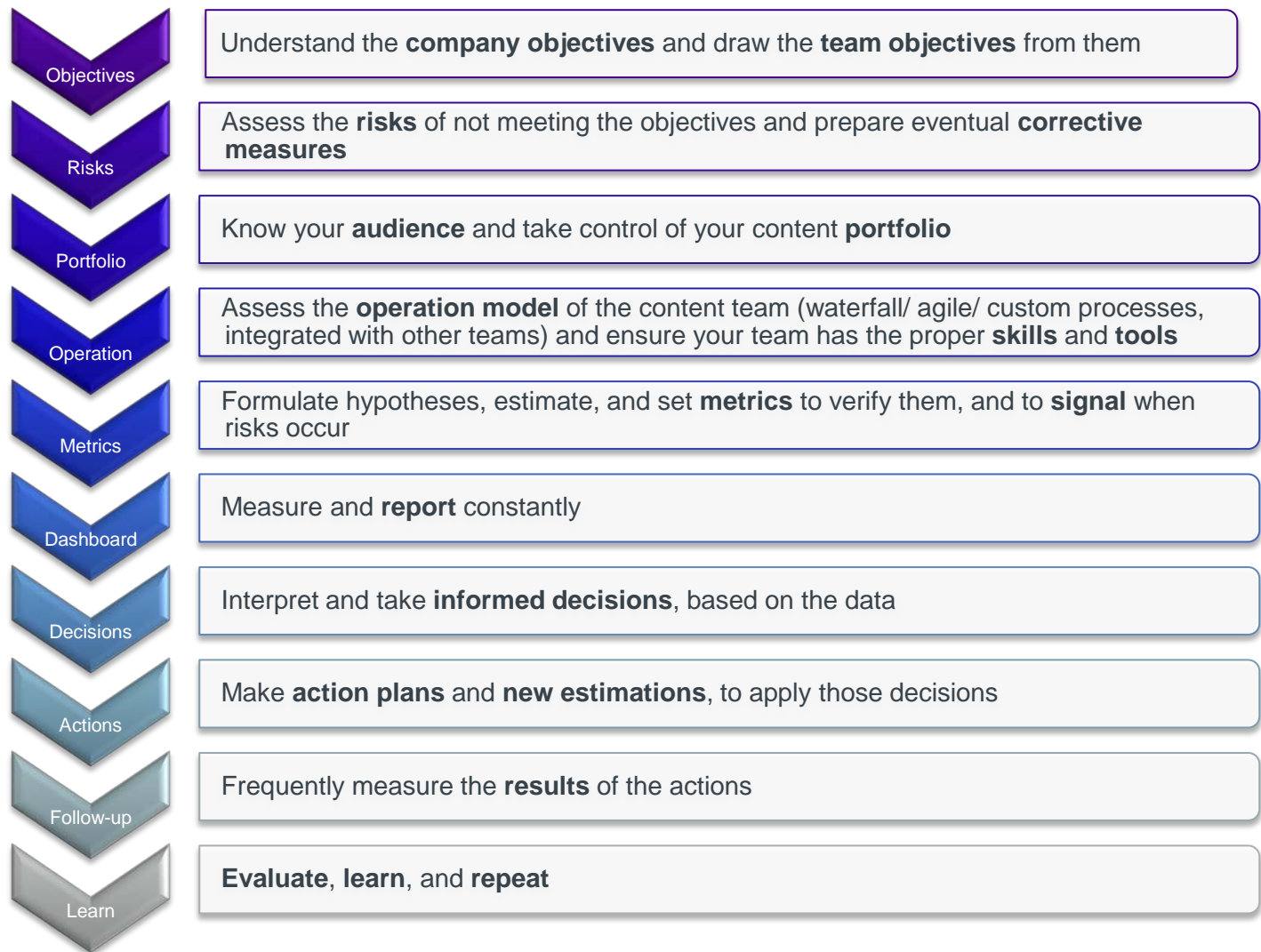
Content metrics in context

Magda Caloian
Vestas Wind Systems



Why metrics

Suggested process for content teams to stay on track and provide data



Metrics and context

What we can learn from web analysts

Numbers are only part of the story: **context**, comparison, segmentation, dashboards, reports.

- **Business Objectives:**
Why does your website exist? – *Sell more stuff.*
DUMB: Doable. Understandable. Manageable. Beneficial.
- **Goals:**
Strategies to accomplish the business objectives - *do x, improve y, reduce z*
- **Metrics:**
A metric is a number that determines progress performance in terms of monetary, schedule, or quality results.
- **KPIs:**
Key performance indicator: a metric that helps you understand how you are doing against your objectives. - *Average Order Size.*
- **Targets:**
Numerical values you have pre-determined as indicators of success or failure.
- **Dimensions:**
An attribute of the Visitor to your website, used for custom reports and advanced segmentation – *referral site, browser version, visits*
- **Segments:**
A group of entries from one or more dimensions. - *People who come from images.google.com and smartphones*

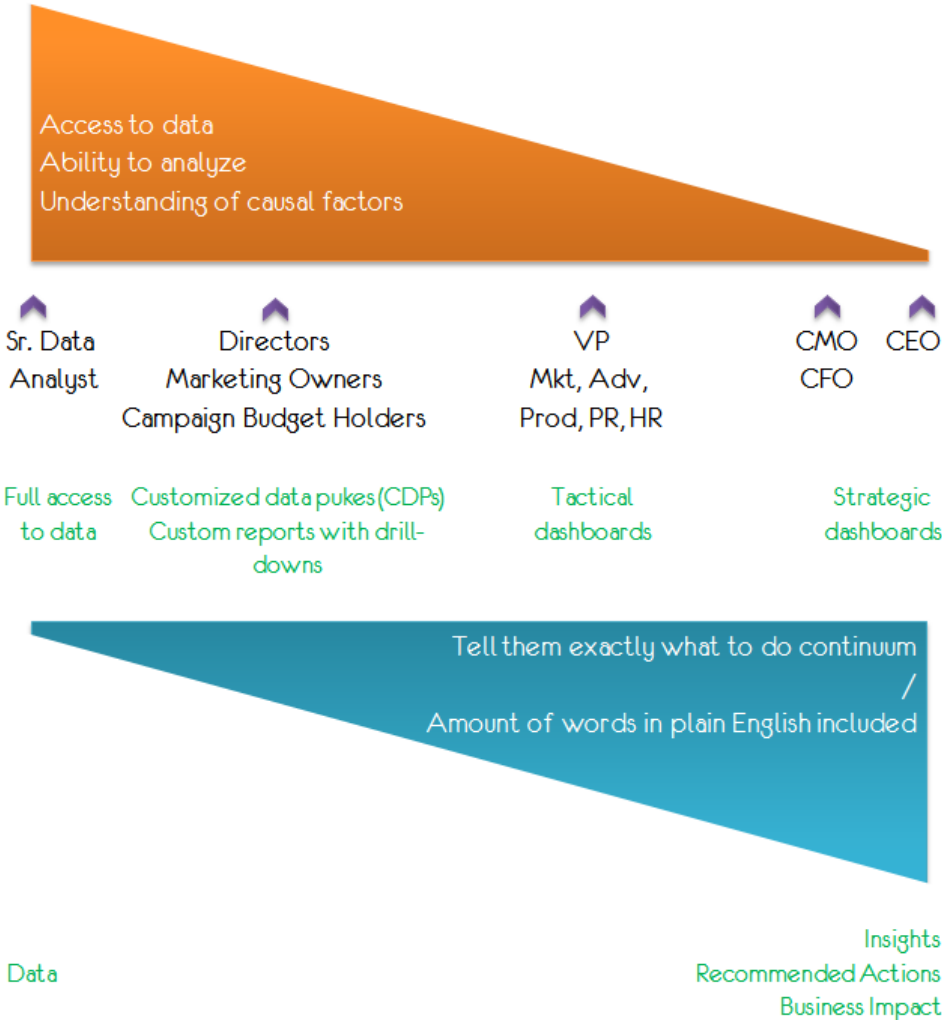
Avinash Kaushik, Digital Marketing Evangelist

Metrics and context

What we can learn from web analysts

Dashboards per role:

- Tactical dashboard
- Strategic dashboard
- Executive dashboard



Avinash Kaushik, Digital Marketing Evangelist

Content and metrics

What we can learn from web analysts

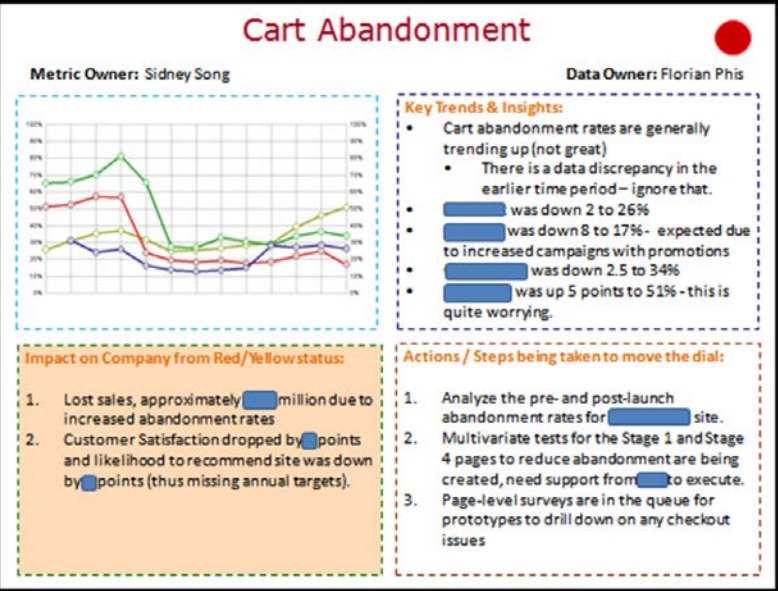
Tactical dashboard



Strategic dashboard



Executive dashboard



Content and metrics

Calculation example - Customer KPI

monthly cost of calls =

(monthly unique visits x *calls to customer service ratio*) x (customer service hourly rate x handle time)

where

calls to customer service ratio = number of unique visitors of a website who made a call ÷ total unique visitors of that website

To improve: run survey/ interviews to investigate the causes; improve usability by adding FAQs, glossary, how-to sections.

Source: "When search meets web usability"
Shari Thurow, Nick Musica

Content and metrics

101 metrics for technical communication (tekomp)

- Metric
- Description

Definition

Calculation

Relevance

Worth mentioning



Example: New and updated projects rate

$$\text{New projects rate} = \frac{\sum \text{New projects}}{\sum \text{Documentation projects}} \times 100$$

$$\text{Updated projects rate} = \frac{\sum \text{Updated projects}}{\sum \text{Documentation projects}} \times 100$$

$$\text{Ratio} = \frac{\sum \text{New projects}}{\sum \text{Updated projects}}$$

7.4.5 Neuerstellungs- und Aktualisierungsquote

BESCHREIBUNG	Die relationalen Kennzahlen Neuerstellungs- und Aktualisierungsquote ermitteln den Anteil an Dokumentationsprojekten, die eine Neuerstellung bzw. eine Aktualisierung von Informationsprodukten zum Ziel haben im Verhältnis zur Gesamtzahl an Dokumentationsprojekten.
DEFINITION	Für eine exakte Ermittlung des Anteils an Neuerstellungsprojekten bzw. von Aktualisierungs- und Pflegeaufträgen an den Dokumentationsprojekten muss eindeutig definiert sein, ab wann ein Dokumentationsprojekt als Neuerstellung gilt. Beispielsweise kann als Neuerstellung gewertet werden, wenn mehr als 75 % der Informationseinheiten neu zu erstellen sind. Die Kennzahl gibt die Relation der Anzahl von Neuerstellungsprojekten bzw. von Aktualisierungen zur Gesamtzahl der Projekte wieder. Berechnet werden kann ferner das Verhältnis Anzahl von Aktualisierungen geteilt durch Anzahl von Neuerstellungen. Diese Kennzahl wird am sinnvollsten als „1:x“ angegeben, d.h. pro Neuerstellung werden x Aktualisierungen bearbeitet.
BERECHNUNG	$\text{Neuerstellungsquote} = \frac{\sum \text{Neuerstellung}}{\sum \text{Dokumentationsprojekte}} \times 100$ $\text{Aktualisierungsquote} = \frac{\sum \text{Aktualisierung}}{\sum \text{Dokumentationsprojekte}} \times 100$ $\text{Verhältnisquote} = \frac{\sum \text{Neuerstellung}}{\sum \text{Aktualisierung}}$
RELEVANZ	<div> </div> <p>Was ist unser Hauptgeschäft? Das Ausmaß an Neuerstellungen und Aktualisierungen ist weitgehend von der Produktstruktur des Unternehmens bestimmt – davon, wie viele Produktneuentwicklungen und wie viele Produktänderungen auftreten. Daher ist diese Kennzahl in erster Linie ein Indikator für die grundsätzliche Struktur der Leistungserstellung des Bereichs. Sie gibt Auskunft über die Art der Tätigkeit einer Abteilung für Technische Kommunikation und ist daher besonders für den Vergleich von Unternehmen relevant. In Verbindung mit Kennzahlen wie die → Auftragszahl, die → Medienvielfalt und der → Informationsproduktquote rundet diese Kennzahl das Bild vom Leistungsportfolio in der Technischen Kommunikation ab.</p>
ERWÄHNENS- WERTE PUNKTE	Oft sind hier durch die Möglichkeit der Wiederverwendung von Informationseinheiten die Übergänge von Neuerstellung zu Aktualisierung fließend.

Source: 101 Kennzahlen für die Technische Kommunikation, tekomp

Content and metrics

Metrics for technical content

Content Strategy experts are sharing:

- quality checklists
- maturity models
- yearly industry benchmarking
- tools surveys
- satisfaction surveys
- other reports and publications

Easy to use

Task orientation (page 17)

12345

The information is appropriate for the intended audience.

12345

The information is presented from the user's point of view.

12345

A practical reason for the information is evident.

12345

The focus is on real tasks.

12345

The headings reveal the tasks.

12345

The tasks are divided into discrete subtasks.

12345

The step-by-step instructions are clear.

12345

Accuracy (page 47)

12345

The information has

The information reflects product.

The information about

Corrections have been from accuracy-check

The references to related

Completeness (page 48)

All topics that support and only those topics

Each topic has just the

Patterns of information

Information is repeated

Page 2 of 2

Savings through reuse

In this section, specify the percentage of reuse you anticipate in a new workflow. We recommend conservative estimates for business cases—it's generally better to underestimate a bit, especially if you're presenting information to management.

Estimated reuse percentage with new workflow

40

Annual cost savings from reuse

\$3,750,000.00

Automated formatting

This section calculates the cost savings you get by eliminating manual desktop publishing/formatting and replacing it with automated formatting.

Annual cost savings from automated formatting

\$212,500.00

This calculation assumes that your formatting time drops to zero after you set up automated formatting.

Localization

Number of target languages (not including the source language in which content is first written)

24

Annual localization spending

\$22,680,000.00

Annual cost savings from eliminating formatting from localization

\$5,670,000.00

Business case summary

Your total estimated cost savings from reuse, automated formatting, and localization.

TOTAL annual estimated cost savings

\$9,632,500.00

DITA Maturity Model reference

The following table provides an overview of the maturity levels and key adoption points.

Table 1: DITA Maturity Model reference

Level	Scope	Key DITA Features	Reuse Strategy	People	Process	Tools
1 DITA topics	Individual	<ul style="list-style-type: none">Nested DITA topicsCross-reference elements	<ul style="list-style-type: none">Conditional processing across single structure for all outputs/variants	<ul style="list-style-type: none">Basic editing skills	<ul style="list-style-type: none">Preserve existing processes	<ul style="list-style-type: none">WYSIWYG editorFile or source control systemEditor-based publishing
2 DITA maps	Team	<ul style="list-style-type: none">DITA mapsconrefconditions	<ul style="list-style-type: none">Reuse of topics through maps for managing multiple deliverables/product variants	<ul style="list-style-type: none">Team-level coordinationMap editing skillsReuse planning skills	<ul style="list-style-type: none">Reuse processConfiguration managementComponent content management	<ul style="list-style-type: none">Map editorVersion control systemScriptable toolkit
				<ul style="list-style-type: none">Content analysis skillsDITA specialization skillsXSL/XSL-FO skillsContent authoring skillsInformation architecture skills	<ul style="list-style-type: none">Content model guidelinesContent type authoring guidelinesMap authoring guidelinesStyle guidelinesCoding guidelinesSpecialization policiesQuality initiatives (structural consistency, task analysis...)	<ul style="list-style-type: none">Specialization-aware or specific editorsDifferentiated editing environments for different authoring needsComponent content management systemExtensible toolkitCustomized processing
				<ul style="list-style-type: none">Cross-product and cross-discipline coordination/councilsAwareness of related discipline's contentContent strategy skillsGlobalization skills	<ul style="list-style-type: none">Cross-discipline content strategyTopic-based translation processCross-discipline reuse planning and coordinationMetadata management/controlled metadata valuesAutomated review and approval workflowsGlobalization policiesRequirements management	<ul style="list-style-type: none">Diversified editor solutionsTranslation servicesEnterprise content management system with automated workflowAutomated metadata-driven buildsRequirements traceability

Developing Quality Technical Information, IBM Press
DITA Maturity Model, Michael Priestley and Amber Swope
<https://www.scriptorium.com/xml-business-case-calculator/>

8 | Content metrics in context, ConVeX 2021

Classification: Restricted

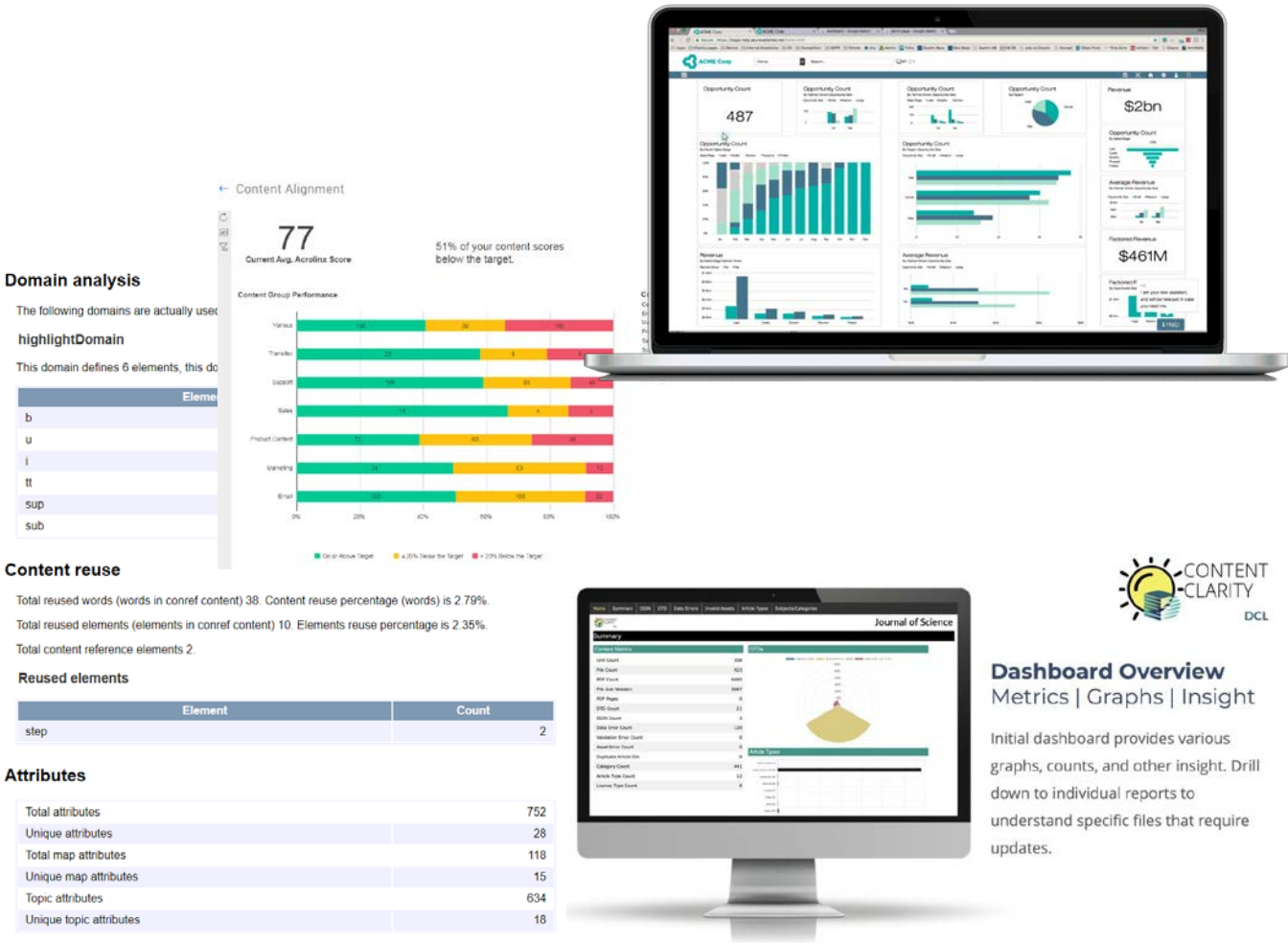
Vestas

Content and metrics

Metrics for technical content

Some DITA tools come with a few helpful reports and dashboards:

- oXygen DITA Map report
- DCL Content Clarity
- Zoomin analytics
- Acrolinx dashboard
- REx (Report Exchange format)
- ...



Content and metrics

DITA Metrics 101 (Mark Lewis)

What you should know about your process (baseline)

- cost to create new content w/o reuse
- cost to review new content w/o reuse
- cost to edit new content w/o reuse
- reuse percentage (e.g. 10-50%)
- cost to find and reuse content (factor)
- time for contextual review of reused content by tech reviewer
- time for contextual review of reused content by editor
- cost of formatting (e.g. 30-35%)
- average number of words per topic (e.g. task:125, concept:75, reference:100)
- translation speed (e.g. 185 words/hr)
- translation cost per word (e.g. \$0.24)

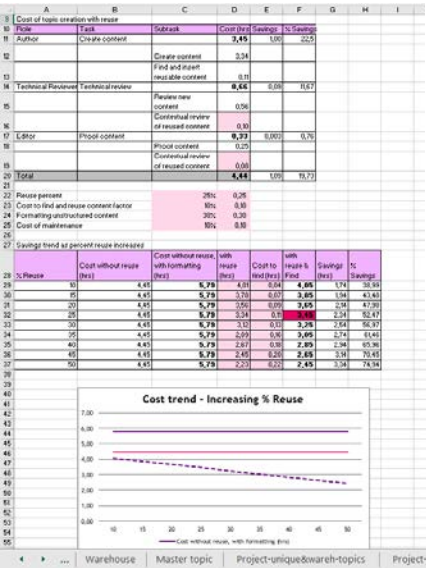


Figure 78: Savings trend as percent reuse increases

% Reuse	Cost without Reuse (hrs.)	Cost with Reuse (hrs.)	Cost to Find (hrs.)	Cost with Reuse plus Find (hrs.)	Savings (hrs.)	% Savings
10.00	4.45	4.01	0.04	4.05	0.40	9.0
15.00	4.45	3.78	0.07	3.85	0.60	13.5
20.00	4.45	3.56	0.09	3.65	0.80	18.0
25.00	4.45					
30.00	4.45					
35.00	4.45					
40.00	4.45					
45.00	4.45					
50.00	4.45					

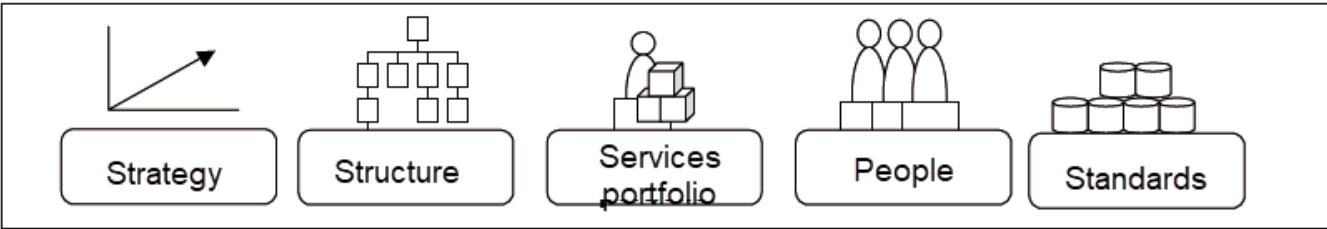
Figure 86: Translation savings as the percent reuse increases

% Reuse	Cost without Reuse (hrs.)	Cost with Reuse (hrs.)	Savings (hrs.)	% Savings
10.00	0.65	0.50	0.16	23.85
15.00	0.65	0.47	0.18	28.08
20.00	0.65	0.44	0.21	32.31
25.00	0.65	0.41	0.24	36.54
30.00	0.65	0.39	0.27	40.77
35.00	0.65	0.36	0.29	45.00
40.00	0.65	0.33	0.32	49.23
45.00	0.65	0.30	0.35	53.46
50.00	0.65	0.28	0.38	57.69

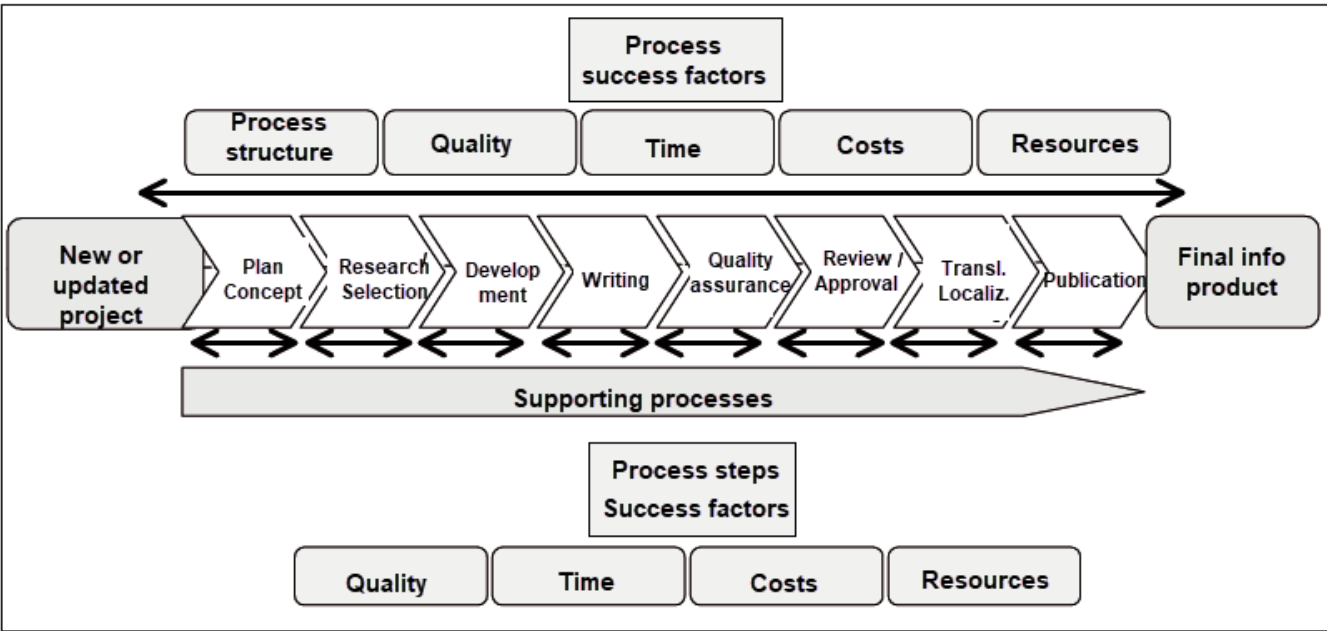
Content and metrics

101 metrics for technical communication (tekomp)

Organization metrics



Process metrics



Original: 101 Kennzahlen für die Technische Kommunikation, tekomp

Content and metrics

Quality checklists - Content auditing

Auditing goals:

- ☐ Content is targeting at least one clear audience
- ☐ Content reflecting the persona interests and goals
- ☐ A call to action on each web page
- ☐ Content mapped to a step in the customer task flow

Content audit checklist

- ✓ Ownership
- ✓ Accuracy
- ✓ Relevance
- ✓ Uniqueness
- ✓ Brand
- ✓ Call to action
- ✓ Purpose
- ✓ Format
- ✓ Performance
- ✓ Readability
- ✓ Discoverability

Content audit report

- ❖ Executive summary
- ❖ What we assessed
- ❖ Business goals
- ❖ User needs
- ❖ Audit criteria
- ❖ Current state assessment
 - ❖ Qualitative audit
 - ❖ Content effectiveness/ performance
 - ❖ Competitive audit
- ❖ Recommendations
- ❖ Appendices

Source: *Content audits and inventories*, Paula Land

Content and metrics

Qualitative audit factors and scale

Factor	Scale or category
Usability	Rating scale (1-5)
Knowledge level	Rating scale
Findability	Rating scale
Actionability	Rating scale
Audience	Predefined list of audience
Accuracy	Rating scale
Business value	Predefined list of goals
Message	Predefined list of key messages
Brand/ Voice	Rating scale

Source: *Content Strategy for the Web*, K. Halvorson, M. Rach

Conclusion

Context matters

Not necessarily...



☐ High bounce rate

☐ Long time on site

☐ Short time on site

☐ Top search results

☐ Downloads

Conclusion

Take-aways

- Make the business goals measurable & realistic
- Decide what to measure, why it's important, how to measure it, and how often.
- Measurement is useless if you don't act on what you learn.
- Combine quantitative and qualitative KPIs
- Segment and compare across dimensions and time periods
- Track both lagging (revenue, profit, cost of past actions) and leading indicators (estimates)
- Look for context beyond financial and customer indicators. Check products, processes, people indicators for important warnings. Ask for customer feedback and for retrospective meetings results
- Be more than the deliverer of data. Don't look at overloaded metrics reports like a Tarot reader. Be knowledgeable about what to do with the data, and what actions to take.

Content metrics in context

Resources

- The Technical Communication Body of Knowledge (TCBOK) <https://www.tcbok.org/producing-information/tools-and-technologies/metrics/>
- Avinash Kaushik <https://www.kaushik.net/avinash/digital-marketing-and-measurement-model/>
- Agile transformation and the elephant in the room - why traditional budgeting is the antithesis of Agile and what to do about it , Bjarte Bogsnes, Jan. 2021 <https://www.linkedin.com/pulse/agile-transformation-elephant-room-why-traditional-what-bogsnes>
- How to incorporate Product Goals in SAFe, Luxshan Ratnaravi, Jan. 2021 <https://www.linkedin.com/pulse/how-use-product-goals-safe-luxshan-ratnaravi>
- *Strategize*, Roman Pichler
- *When search meets web usability*, Shari Thurow and Nick Musica
- *The Content Strategy Toolkit*, Meghan Casey
- *Content Strategy for the Web*, K. Halvorson, M. Rach
- *DITA Metrics 101*, Mark Lewis
- *Einführung eines Redaktionssystems für die Technische Dokumentation*, VDMA Verlag, 2010 (The Mechanical Engineering Industry Association)
- *101 Kennzahlen für die Technische Kommunikation*, Straub D., Grau M., Fritz M. (tekom, 2008)
- *Metrische Untersuchung der Wiederverwendung im Content Management*, W. Ziegler
- <https://www.styrz.de/projektaufwaende-anhand-von-kennzahlen-und-einer-entscheidungsmatrix-richtig-abschaetzen-tekom-summercon-2020/>
- *Content audits and inventories*, Paula Land

Thank you for attending.

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