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

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The OASIS DITA Adoption Technical Committee members collaborate to provide expertise and resources to educate the marketplace on the value of the DITA OASIS standard. By raising awareness of the benefits offered by DITA, the DITA Adoption Technical Committee expects the demand for, and availability of, DITA conforming products and services to increase, resulting in a greater choice of tools and platforms and an expanded DITA community of users, suppliers, and consultants.

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### Document History

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<th>Revision</th>
<th>Date</th>
<th>Author</th>
<th>Summary</th>
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<tr>
<td>0.5</td>
<td>July 22, 2013</td>
<td>Deb Bissantz and Jacquie Samuels</td>
<td>First draft reviewed by OASIS members.</td>
</tr>
<tr>
<td>0.6</td>
<td>August 22, 2013</td>
<td>Deb Bissantz and Jacquie Samuels</td>
<td>Second draft reviewed by OASIS members.</td>
</tr>
<tr>
<td>1.0</td>
<td>September 4, 2013</td>
<td>Deb Bissantz and Jacquie Samuels</td>
<td>Ready to publish.</td>
</tr>
</tbody>
</table>

Last revision 4 September 2013

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Overview

*Filling key roles with qualified individuals helps ensure a successful DITA adoption.*

DITA (Darwin Information Typing Architecture) adoption is more than a simple change of tools. Implementing DITA can increase the quality of your documentation, streamline your authoring, reviewing, publishing, and translation processes, and introduce new outputs and user experience of published content.

Adopting a DITA writing environment requires a number of key roles. The individuals in these roles develop an adoption plan, get approval and funding for the adoption, and implement a series of strategies, processes, and tools that meet the requirements of your organization. An effective DITA adoption directly and positively impacts the end-user experience with your products and with your company. An effective DITA writing environment makes authoring, reviewing, publishing, and translating content faster and easier.

Done improperly or without adequate skills at your disposal, DITA adoption can be an expensive project that may not yield the results you hoped for.

A poorly implemented DITA adoption or implementing a DITA writing environment without adequate skills can be an expensive project. Without skilled individuals, a well-defined adoption plan, and a successful implementation, you might not see the results you were expecting.

**DITA Adoption Process**

A successful DITA adoption includes these phases:

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.

![Figure 1: Phases of the DITA Adoption Process](image)

All of the tasks, roles, and responsibilities should be addressed in the general order that we suggest regardless of your specific adoption process. For example, omitting a content strategy in the early phases directly impacts your processes and the effectiveness of tools. You will likely perform a content strategy in one of the later phases, which is far less effective.

You might find that some of your phases overlap or even occur in a different order. Your phases might occur in a different order for one of these reasons:

- You receive approval first because management is the driving force behind the adoption.
- You decide to skip a pilot phase and go right to adoption.
- You require approval throughout each phase.

The adoption phase might have sub-phases, where you stagger adoption based on external forces, such as release dates or customer requests.
Experience

The most successful DITA adoptions combine personnel with DITA experience with existing in-house personnel. Hiring individuals or consultants who have demonstrable experience in the roles can be crucial to the success of your DITA project. Experienced personnel help you avoid pitfalls and implement efficient strategies. Individuals with DITA experience can communicate the possibilities that DITA introduces to those on the team who are not DITA experts. Knowing what is possible and how to best implement a solution can be the difference between success and failure.

The following roles should have previous DITA experience:

- Information Architect/Content Strategist
- Technical/Publishing Expert
- Conversion Specialist
- Trainer
- Technical Editor
- Content Management Specialist

For most of the other roles, experience with DITA is desirable but not necessary.

Some roles are best positioned to learn DITA on the job. These roles include authors, project managers, and managers who understand the products, the company, the brand, and the end users. The knowledge and experience they bring to the project are essential to identifying requirements, creating a vision of the end result, building the right solution, and generally developing a DITA adoption that brings the highest user satisfaction while saving the most money.
Collaboration as Strength

The best DITA adoption results occur when key roles collaborate closely together.

In this feature article, we chose to describe the roles associated for each phase separately. However, the individuals who assume the responsibilities for these roles need to work together to evolve the content for the entire organization.

A DITA adoption project is more than simply placing XML tags around content. The adoption project is a transformation of static legacy content into a dynamic body of knowledge. The transformed content is more easily used, more easily found, and more easily accessed. This body of knowledge evolves to meet current and future requirements. The agility and flexibility of DITA introduce many cutting-edge possibilities to your content life-cycle processes and expand your delivery and consumption options. This transformation requires knowledge of what is possible, including tools and techniques, and also requires a deep understanding of the content subject matter and the end users.

The vision, planning, and implementation of a DITA adoption project is vastly enhanced by bringing together the many roles to communicate ideas, challenges, and goals through an ongoing series of working sessions. Although each role brings its own perspective and understanding to the project, the multi-faceted view of the project generates a cohesive solution that makes the DITA adoption project successful. The success of the project spreads beyond adoption to include increased return on investment (ROI), improved quality of content, and higher user satisfaction.

Involving key enterprise stakeholders, such as the Chief Information Officer (CIO), early in the collaborative process ensures that your DITA adoption project can scale to other departments or divisions within your enterprise when the time comes.
Roles, Responsibilities, and Skills

As an organization investigates moving to a DITA writing environment, new roles, responsibilities, and skills must be identified. We highly suggest that you consider a resource strategy at the same time that you consider a content strategy. We have identified several roles that are required for a successful DITA implementation. As you progress through your DITA implementation, the number and types of roles might change. The roles required during the investigation phase are significantly different than the roles required for a fully established DITA environment.

As you develop your resource strategy, consider these guidelines:

- One or more individuals might assume responsibilities for a single role.
- One individual might assume responsibility for one or more roles.
- Individuals might change roles as your organization progresses through the phases of implementation.
- The responsibilities for a role might change slightly as your organization progresses through the phases of implementation.
- You may need to outsource some of the responsibilities.

The table in *DITA Roles, Responsibilities, and Skills* summarizes each role.

**Table 1: Suggested Roles During the Phases of DITA Implementation**

The different phases of a DITA implementation and the suggested roles for each implementation phase.

<table>
<thead>
<tr>
<th>Role</th>
<th>Investigation</th>
<th>Selling to Management</th>
<th>Pilot</th>
<th>Adoption</th>
<th>Continuous Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authors</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Content Management Specialist</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Conversion Specialist</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Information Architect/Content Strategist</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Technical Communication Manager</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Lead Authors</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Technical/Publishing Expert</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Sponsor</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Subject Matter Experts as Authors</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Subject Matter Experts as Reviewers</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Technical Editor</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Trainer</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Localization Coordinator</td>
<td>Optional</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>User Experience Designer</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
DITA Roles, Responsibilities, and Skills

The following table refers to the main tasks the corresponding role performs throughout the phases of DITA adoption. In each phase, roles have specific responsibilities that may or may not be needed in other phases.

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Skills</th>
</tr>
</thead>
</table>
| Information Architect/Content Strategist | • Understands the current state of every phase of the content life cycle  
• Defines the content strategy, including tools, processes, and strategies for publishing, translation and single sourcing  
• Defines the DITA model for the organization  
• Defines and develops any DITA specializations  
• With Publishing Expert, develops constraints that meet the DITA model  
• Plans projects, including identifying key resources  
• Attends and participates in webinars and conferences  
• Identifies opportunities for enhancements in content, automation, translation, or single sourcing using new tools, strategies, or processes as they emerge  
• Develops and maintains authoring templates  
• Manages authoring environment | • Proficient with the DITA architecture  
• Knowledge of end users  
• Knowledge of the breadth of content  
• Knowledge of business drivers and goals  
• Requirement gathering  
• Ability to visualize cutting-edge theories, tools, and practices  
• High-level thinker and strategic planner  
• Ability to determine the best way to single sourcing and leverage metadata  
• Knowledge of relevant tools (CCMS, XML editors, and publishing options)  
• DTD/XSD expertise |
| Technical/Publishing Expert    | • Establishes and customizes the publishing pipeline for all required deliverable outputs  
• With the Information Architect/Content Strategist, develops constraints, if needed  
• With the Information Architect/Content Strategist, develops specializations, if needed  
• Develops and maintains style sheets | • Proficient in relevant publishing mechanisms. If using the DITA Open Toolkit, skills include:  
• XSLT-FO  
• FOP, XEP, and Antenna House or other publishing engine  
• Knowledge of XML, DTDs/XSDs, HTML, CSS, Java, XSL, XQuery and Ant  
• Proficient with the DITA architecture  
• Proficient with XML editors  
• Ability to develop software (programming languages) |
| Content Management Specialist | • Defines the CCMS requirements  
• Analyses and selects an appropriate CCMS  
• Manages the CCMS, including organization, workflow, user management, and automation | • Proficient with the DITA architecture  
• Proficient with a variety of CCMSs  
• Ability to troubleshoot errors  
• Ability to provide initial and ongoing training  
• Ability to support the team |
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Skills</th>
</tr>
</thead>
</table>
| Technical Communication Manager   | • Manages personnel involved in the DITA Adoption process  
  • Identifies key players in the DITA adoption process both inside and outside of the Technical Communication department  
  • Manages finances associated with the DITA adoption process  
  • Personnel salaries  
  • Training expenses  
  • Tool licenses  
  • Ensures that all individuals receive adequate training  
  • Ensures that all individuals have access to the required tools | • Ability to plan and acquire resources  
  • Knowledge of available funding  
  • Ability to track and manage expenses  
  • Ability to analyze and forecast costs |
| Lead Authors                      | • Plan, manage, and deliver content, reuse, and translation requirements for projects and documents  
  • Manage high-level maps  
  • Implement reuse strategy  
  • Work with Information Architect/Content Strategist to identify new possibilities for reuse and new requirements for the model  
  • Identify knowledge gaps (lack of training on tools, for example) of authors | • Deep knowledge of end users  
  • Knowledge of DITA and DITA best practices  
  • Experience with an XML editor  
  • Ability to learn new tools and processes  
  • Ability to adapt writing style to topic-based authoring  
  • Ability to consider, manage, and plan for complex content requirements and consider various strategies to deliver the content that is needed while streamlining internal content-creation processes |
| Authors                           | • Author content  
  • Use the CCMS  
  • Create and manage sub-maps  
  • Follow the established DITA model  
  • Write content that follows organization standards | • Knowledge of DITA and DITA best practices  
  • Experience with an XML editor  
  • Ability to learn new tools and processes  
  • Ability to adapt writing style to topic-based authoring |
| Subject Matter Experts as Authors | • Author topics  
  • Write to organization standards | • Ability to write topics that are self contained and have an appropriate level of detail |
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subject Matter Experts as Reviewers</strong></td>
<td>• Review content in or out of the context of a &quot;book&quot; (topics or maps)</td>
<td>• Nothing that is specific to a DITA environment</td>
</tr>
<tr>
<td><strong>Technical Editor</strong></td>
<td>• Ensures consistency in both content and structure</td>
<td>• Knowledge of DITA best practices</td>
</tr>
<tr>
<td></td>
<td>• Identifies opportunities for single sourcing</td>
<td>• Knowledge of single sourcing</td>
</tr>
<tr>
<td></td>
<td>• Ensures the content meets end-user requirements</td>
<td>• Understanding of DITA reuse mechanisms</td>
</tr>
<tr>
<td></td>
<td>• Identifies areas where authors need more training or must confer with the</td>
<td>• Proficient in DITA elements and attributes</td>
</tr>
<tr>
<td></td>
<td>Information Architect/Content Strategist</td>
<td>• Proficient in minimalism and topic-based writing</td>
</tr>
<tr>
<td></td>
<td>• Creates and maintains a writing style guide and DITA markup guide</td>
<td></td>
</tr>
<tr>
<td><strong>User Experience Designer</strong></td>
<td>• Researches how end users will access and experience the content</td>
<td>• Expertise with all types of users</td>
</tr>
<tr>
<td></td>
<td>• Defines, designs, and implements how users will experience published content</td>
<td>• Proficient at gathering user feedback using a variety of tools</td>
</tr>
<tr>
<td></td>
<td>• including navigation, custom content, and searching</td>
<td>• Experienced at performing user analyses and user research</td>
</tr>
<tr>
<td></td>
<td>• Works with the Content Management Specialist to deploy content from the</td>
<td>• Knowledge of HTML and CSS</td>
</tr>
<tr>
<td></td>
<td>CCMS to the publishing location</td>
<td>• Familiarity with search engine customization</td>
</tr>
<tr>
<td></td>
<td>• Works with various departments (including but not limited to IT/Website Team/</td>
<td>• Experience with Search Engine Optimization (SEO) best practices</td>
</tr>
<tr>
<td></td>
<td>Development/Marketing) to make user experience of content a seamless experience</td>
<td>• Expert in accessibility and legal requirements for public access of</td>
</tr>
<tr>
<td></td>
<td>with the rest of the company content/products</td>
<td>information</td>
</tr>
<tr>
<td></td>
<td>• Works with Content Management Specialist and the Technical/Publishing Expert</td>
<td>• Proficient with the DITA architecture</td>
</tr>
<tr>
<td></td>
<td>to define and implement requirements for user experience (such as leveraging</td>
<td>• Knowledge of DITA best practices, linking strategies, and single</td>
</tr>
<tr>
<td></td>
<td>profiling and searching metadata)</td>
<td>sourcing</td>
</tr>
<tr>
<td></td>
<td>• Manages dynamic or periodic updates of content</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Manages the user experience and implements upgrades and improvements</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gathers metrics and details on users, user behavior, user feedback, search</td>
<td></td>
</tr>
<tr>
<td></td>
<td>terms, stale content, and so on</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Plans, builds, and manages user communities</td>
<td></td>
</tr>
<tr>
<td><strong>Localization Coordinator</strong></td>
<td>• Plans and implements ongoing translation management using in-house translators</td>
<td>• Expertise with localization best practices</td>
</tr>
<tr>
<td></td>
<td>or using a translation service provider</td>
<td>• Experience with the XLIFF standard</td>
</tr>
<tr>
<td>Role</td>
<td>Responsibilities</td>
<td>Skills</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Role</td>
<td>Oversees translation results • Manages costs, including collecting estimates, monitoring costs, and optimizing costs • Develops and maintains translation workflow mechanisms • Investigates and implements ongoing improvements to the translation process, including tools and strategies</td>
<td>Experience with translation in a DITA environment • Knowledge of CCMS translation functionality • Knowledge of DITA best practices and reuse mechanisms • Knowledge of translation tools and trends</td>
</tr>
<tr>
<td>Conversion Specialist</td>
<td>Performs a content audit of legacy materials • Performs a content inventory and prioritizes content for conversion (determines what and when to convert) • Prepares the content for conversion • Maps the structures in the legacy content to the new DITA architecture, using the input of the architect and the lead writer • Reworks legacy content prior to conversion (or directs the re-work) • Identifies inconsistencies to be addressed • Works with the Content Management Specialist to define the requirements for the conversion • Converts or selects conversion process of legacy content to DITA XML • Performs quality assurance checks on converted content</td>
<td>Proficient with conversion tables or equivalent conversion tools • Proficient in: • XML • XQuery • Scripting languages (such as ExtendScript or equivalent) • Proficient with the DITA architecture and DITA best practices • Knowledge of content strategy • Understanding of the breadth of content and users</td>
</tr>
<tr>
<td>Trainer</td>
<td>With input from the Content Management Specialist and other key members of the team, determines the training requirements including curriculum, method of delivery, and frequency of delivery • Develops training content, including real examples for various types of trainees • Trains authors, reviewers, translators, and any other stakeholders in: • DITA foundations • DITA best practices • Processes • Tools including, the XML editor, the CCMS, and the publishing tools • Provides on-demand training</td>
<td>Expertise with DITA, XML editors, and CCMSs • Proficient at creating and delivering in-person and online training • Proficient with the DITA architecture, DITA best practices, tools, and related processes • Ability to tailor training content for specific learners • Ability to lead learners through hands-on exercises</td>
</tr>
<tr>
<td>Role</td>
<td>Responsibilities</td>
<td>Skills</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Sponsor    | • Develops the project vision                                                                                                      • Acts as the advocate for the project to get corporate alignment and budget approval  
• Explains the benefits of DITA to other members of management and key stakeholders throughout the enterprise  
• Introduces and communicates the possibilities of implementing an enterprise DITA solution  
• Can communicate the advantages of DITA in terms of business value for various departments or divisions | • Has executive communication skills (ability to get cross-functional interest and agreement)  
• Aware of the benefits of streamlining the content life cycle  
• A visionary, capable of understanding the business value of expanding the DITA solution to the enterprise  
• Can connect the content strategy to the business strategy  
• Familiar with the current content creation, publishing, and management processes |
| Project Manager | • Engages all stakeholders  
• Develops and adheres to the budget  
• Manages resources and time lines  
• Develops and meets milestones  
• Acts as liaison and communicator between initial project and key stakeholders in the enterprise | • Has executive communication skills (ability to get cross-functional interest and agreement)  
• Ability to plan projects  
• Ability to manage resources  
• Appreciation of the value of XML |
## Investigation Phase

As an organization investigates moving to a DITA writing environment, many aspects of the investigation require new roles and responsibilities. In the investigation phase, you gather information that lets you accurately estimate, plan, and build your business case for subsequent phases.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content Management Specialist</strong></td>
<td>Investigates the different options for managing content. Works with Component Content Management System (CCMS) vendors to develop a solution for the organization.</td>
</tr>
<tr>
<td><strong>Conversion Specialist</strong></td>
<td>Moving legacy content to DITA requires a deep understanding of the conversion process. Investigates the options for converting content. Conversion options range from manually converting content in-house to using tools that automate the process to contracting with vendors who perform the conversion.</td>
</tr>
<tr>
<td><strong>Information Architect/Content Strategist</strong></td>
<td>Understands the current content life cycle. Is familiar with the organization’s content and is a visionary who sees the potential for content reuse and the benefit of metadata.</td>
</tr>
<tr>
<td><strong>Lead Authors</strong></td>
<td>Provide feedback on the tools and the workflow that are associated with a DITA writing environment. Also provide input into converting legacy content.</td>
</tr>
<tr>
<td><strong>Project Manager</strong></td>
<td>Because the move to a DITA writing environment can be a challenging transition, provides direction and accountability to the team as it investigates the move. Tracks schedules and work assignments and oversees the budget for the investigation team.</td>
</tr>
<tr>
<td><strong>Technical Communication Manager</strong></td>
<td>Works with many of the key players to identify resources that will investigate a DITA writing environment. Manages personnel schedules to allow individuals time to investigate DITA. Acquires budgetary approval and begins a cost analysis for tools, equipment, and resources required to implement a DITA writing environment.</td>
</tr>
<tr>
<td><strong>Technical/Publishing Expert</strong></td>
<td>Understands the various publishing tools that are available to support DITA source content and understands DITA. Develops and maintains templates.</td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td>Each organization requires a management sponsor or champion to support the move to a DITA writing environment. This visionary understands the benefits and the costs of moving to a DITA environment at a high level and can understand the opportunities for enterprise adoption as well, including, but not limited to, training and marketing.</td>
</tr>
<tr>
<td><strong>Localization Coordinator(optional)</strong></td>
<td>If an organization translates content (or wants to translate content in the future), including the Localization Coordinator in the investigation phase is an important part of developing a complete and efficient long-term content strategy (particularly, although not limited to, tool selection).</td>
</tr>
<tr>
<td><strong>User Experience Designer</strong></td>
<td>During the investigation phase, performs preliminary investigation to determine requirements and to identify possible solutions for delivering the content to users.</td>
</tr>
</tbody>
</table>
Selling Phase

After an organization decides to move to a DITA writing environment, several individuals must sell the idea to upper-level management and key stakeholders (such as the Information Technology department). The individuals in this phase rely on the information gathered from those involved in the investigation phase.

**Information Architect/Content Strategist**
Is very familiar with the organization’s content and is a strategist who sees the potential for content reuse and the benefit of metadata. Understands and can clearly communicate the benefits of a DITA writing environment to executives and other key stakeholders who do not necessarily understand XML or legacy content processes or inefficiencies.

**Sponsor**
Is the liaison between upper-level management and the investigation team. Understands the tools required, the changes to work environment, and the effort required for a successful DITA implementation. Understands the benefits and the costs of moving to a DITA writing environment.

**Technical Communication Manager**
Works closely with the Information Architect/Content Strategist and the Sponsor to prepare a proposal to upper-level management. Understands and manages the expenditures involved in moving to a DITA writing environment, including personnel, tools, and training.
Pilot Phase

After an organization receives approval and funding to move to a DITA writing environment, many individuals must work together to develop tools, procedures, and processes for the new environment. A successful pilot phase relies on the information gathered from the individuals involved in the investigation phase.

**Content Management Specialist**
Understands the DITA architecture. If a CCMS is used, defines the CCMS requirements and drives the vendor selection and CCMS pilot processes.

**Conversion Specialist**
Performs the initial conversion for the pilot project, working in collaboration with the Information Architect/Content Strategist, the Content Management Specialist, and the Technical/Publishing Expert to preserve and add any vital metadata and to conform to the DITA model identified in the content strategy. The initial converted content is used in multiple ways: to test and refine the content strategy, to provide actual samples during the tool selection and customization process, and to provide working samples for the Technical/Publishing Expert to start developing stylesheets for document delivery.

**Information Architect/Content Strategist**
Looks for opportunities to enhance existing content, automate processes, and improve existing tools. Determines the best practices for single sourcing and the best practices for leveraging metadata. Has a deep knowledge of DITA architecture, including the need to develop specializations. Works closely with the Technical/Publishing Expert and the Content Management Specialist to develop and maintain the tools used by the organization.

**Technical Communication Manager**
Developing a sound pilot project requires resources. These resources affect the department expenses. Performing a successful pilot project requires dedicated personnel, tools, and training. The Technical Communication Manager manages and controls the costs associated with the pilot project, ensuring that the project adheres to budget. Maintains open communication with upper-level management. Is responsible for providing regular progress updates and budgetary updates for the pilot project.

**Lead Authors**
As an organization starts moving to a DITA writing environment, Lead Authors work with pilot content and begin to establish writing guidelines and production processes. In the pilot phase, they work closely with all other roles to identify and rectify gaps or errors in the strategies, tools, or processes.

**Project Manager**
Drives the pilot and makes sure that all components are developed on time and that all risks are appropriately managed. Ensures that all vital aspects of the pilot are completed in order and on time. The Project Manager also ensures that the lines of communication remain open among all stakeholders within the pilot phase as well as communication with the rest of the company.

**Technical/Publishing Expert**
Works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for one or two output types. Drives the publishing process and identifies specific publishing tool requirements.

**Sponsor**
Is the liaison between upper-level management and the pilot team. The Sponsor's role during the pilot phase is to keep the pilot from being canceled before it can be completed and to address the wider concerns that the enterprise might have. The Sponsor is also tasked with introducing the wider, enterprise possibilities of a DITA solution.

**Technical Editor**
Provides input, helps create the editing workflows, and develops a style guide that includes DITA markup guidelines, grammar and writing style guidelines, and topic-based writing guidelines.

**Trainer**
Works closely with all persons responsible for the pilot phase. The Trainer develops training materials and curriculum based on the procedures and processes developed during the pilot phase. Must be familiar with all tools and processes used in the DITA writing environment.
Localization Coordinator

If translation is a requirement, starts to develop a work strategy for managing the core language and all required translated languages.

User Experience Designer

Uses the pilot phase to develop the user experience of content, develop use cases and scenarios, create wireframes, and list functional requirements. Also gathers feedback from all stakeholders, but focuses on internal and external end users.
Adoption Phase

A successful pilot phase leads to a roll-out or phased roll-out of the DITA solution to one or more teams in the company: the adoption phase. All individuals involved in the pilot phase act as mentors to the entire team during the adoption phase. The adoption phase includes all roles.

**Content Management Specialist**
Manages and customizes all aspects of content management and the CCMS tools.

**Conversion Specialist**
Continues to convert legacy material, as required.

**Information Architect/Content Strategist**
Continues to develop best practices for single sourcing and best practices for using metadata.

**Technical Communication Manager**
Continues to monitor resources and expenditures. Following a successful pilot phase, has a new budget, new schedule, and additional resources to manage. The Technical Communication Manager is responsible for managing personnel, ensuring that all individuals have access to tools, have received training, and have equipment necessary to work in a DITA writing environment. Is responsible for meeting goals, meeting schedules, and meeting budgetary requirements during the adoption phase. Continues to make regular progress reports to upper-level management.

**Lead Authors**
Help the Authors make the move to DITA adoption, as well as continuing to write new content and manage maps.

**Authors**
Receive training and begin writing content in DITA, learning the tools and processes as they go.

**Subject Matter Experts as Authors**
Might author content in their domain of knowledge either through an XML editor (with training) or using a simplified interface that hides XML tags. Typically, authors review what the SME has written, checking for language, style, and XML tag use.

**Subject Matter Experts as Reviewers**
Review the draft or final content and provide suggestions for corrections and enhancements.

**Project Manager**
Keeps all projects on track.

**Technical/Publishing Expert**
Works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for all remaining output types.

**Sponsor**
Continues to act as the liaison between upper-level management and the writing team.

**Technical Editor**
Ensures that all authors are using the DITA elements and attribute values consistently, that language and structure meet requirements for usability and clarity, and that all possible reuse is being employed.

**Trainer**
Ensures that all authors acquire specific, task-oriented training on the tools, processes, and strategies determined in the pilot phase. The Trainer also provides ongoing training and support for all authors.

**Localization Coordinator**
Coordinates the translation and localization of content to one or more languages and implements the entire process. Ensures quality translations and efficiently manages maps and topics in multiple languages.

**User Experience Designer**
Continuously monitors metrics, search terms, findability, stale content, user feedback, and user experience. Works in coordination with the Information Architect/Content Strategist and the Technical/Publishing Expert to prioritize improvements to the user experience and communicates information about content and product improvements from the end users.
Continuous Improvement Phase

After the DITA adoption process is established, an organization must continually manage content, implement enhancements, and fine-tune tools, solutions, and processes.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content Management Specialist</strong></td>
<td>Manages and customizes all aspects of content management and the CCMS tools. Updates the CCMS tools and procedures with the current releases and new features.</td>
</tr>
<tr>
<td><strong>Conversion Specialist</strong></td>
<td>Continues to convert any required legacy content, including converting content from other departments.</td>
</tr>
<tr>
<td><strong>Information Architect/Content Strategist</strong></td>
<td>Stays current with industry trends and new areas of thought. Determines new requirements, modifies the strategy, and attempts to streamline all processes.</td>
</tr>
<tr>
<td><strong>Technical Communication Manager</strong></td>
<td>Continues to monitor resources and expenditures. As the DITA writing environment evolves, continues to manage and develop the department finances and budget making allowances for tool updates, equipment updates, and consultation services that might be required. Continues to make regular progress reports to upper-level management.</td>
</tr>
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<td><strong>Lead Authors</strong></td>
<td>Continue writing new content and updating existing content.</td>
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<td><strong>Technical/Publishing Expert</strong></td>
<td>Stays current with industry trends and new areas of thought. Develops and maintains all means of publishing XML files used by the organization for all output types. Updates the publishing tools and procedures with the current releases and new features.</td>
</tr>
<tr>
<td><strong>Technical Editor</strong></td>
<td>Ensures that all authors are using elements and attribute values consistently, that language and structure meet requirements for usability and clarity, and that all possible reuse is being employed.</td>
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<td><strong>Trainer</strong></td>
<td>Develops and updates training material and ensures that all Authors receive training in tool changes, new features, and process changes.</td>
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<tr>
<td><strong>Localization Coordinator</strong></td>
<td>Manages ongoing translations to all required languages.</td>
</tr>
<tr>
<td><strong>User Experience Designer</strong></td>
<td>Monitors the user experience including search terms, findability, and metrics. Recommends changes to the design and experience of content and updates the user experience as required by the users.</td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td>Continues to communicate the business advantages of using DITA across the enterprise and how it might be possible to expand the solution out of technical publications into other areas.</td>
</tr>
</tbody>
</table>