Roles and Responsibilities of a DITA Adoption

Deb Bissantz and Jacquie Samuels
OASIS DITA Adoption Technical Committee
OASIS DITA Adoption TC

- The OASIS DITA Adoption Technical Committee is a group of volunteers
- We provide expertise and resources to educate the marketplace on the value of the DITA standard
- This webinar is based on a Feature Article
Deb Bissantz has been a technical writer for more than 12 years. For the past 4 years, she has been the technology lead for the LSI Technical Communications department. She has worked with DITA content for the past 9 years. She is an active voting member of the OASIS DITA Technical Committee and the OASIS DITA Adoption Technical Committee.
Jacquie Samuels has been working with DITA since 2005, when she was part of a DITA adoption as a technical writer, technical editor, and content management specialist.

She is now the owner of Writing Wise, where she consults for companies who are performing DITA adoptions.

She is a Professor of Technical Editing at local college and an active, voting member of the OASIS DITA Adoption Technical Committee.
Keys to a Successful DITA Adoption

- Adopting DITA without a sound implementation plan leads to frustration and higher than expected costs.
- Using a multiple-phased approach gives you the opportunity to assess the DITA adoption process at regular intervals.
- Adopting DITA with poorly skilled individuals can be an expensive and frustrating project.
- Providing individuals in key roles with adequate skills or training leads to a successful adoption.
- Individuals with previous DITA experience can enhance the DITA adoption process.
• Multiple phases
• Phases might overlap or occur in a different order
• Might have sub-phases
• Requires a number of key roles
Collaboration

- When smart people get together…
  - Flexible
  - Dynamic
  - Findable
  - Usable

- Streamline content creation, review, publication

- Huge localization savings
Overview of Roles

A. DITA Experts
   - Content Strategist
   - Publishing Expert
   - Content Management Specialist
   - Technical Editor
   - UX Designer
   - Conversion Specialist
   - Localization Coordinator
   - Trainer

B. Managers, Sponsor
   - Tech Pubs Manager
   - Sponsor
   - Project Manager

C. Subject Matter Experts
   - Lead Authors
   - Authors
   - SMEs as reviewers
   - SMEs as authors
Overview of Roles, cont.

- That’s a lot of people!

- Minimum number of people for success:
  1. Sponsor (to kick things off and keep things going)
  2. Manager (for budget, hiring, and vision)
  3. 1 or more DITA experts (wearing lots of hats!)
  4. 1 or more authors
DITA IA/Content Strategist

- Knows everything
  - Current content
  - Business goals
  - End users

- Visionary
  - Sees the benefits of DITA
  - Defines a reuse strategy
Publishing Expert

- Mechanic
  - Knows the tools
  - Knows the processes
  - Troubleshoots issues

- Inquisitive
  - Looks at available tool options

- Designer
  - Creates production templates and style sheets
Content Management Specialist

- CCMS Wizard
  - Configuration
  - User management
  - Workflow
  - Tool integration
Technical Editor

- **Enforcer**
  - Ensures consistency in content
  - Maintains writing style guide
  - Maintains DITA markup guideline
  - Understands single sourcing and DITA reuse mechanisms
UX Designer

- User Advocate
  - Expertise with all types of users
  - Performs user analyses
  - Manages user interaction with content
  - Aware of accessibility and legal requirements for public access of content
Conversion Specialist

- Transformer
  - Performs content inventory
  - Determines a conversion strategy
  - Proficient with conversion tables or other conversion tools
Localization Coordinator

- **Watchdog**
  - Manages translation cycles
  - Creates translation workflow
  - Investigates translation strategies, tools and vendors
  - Coordinates translation process with translators
Trainer

- Jack of all trades
  - Develops training programs
  - Quick learner
  - Excellent communicator
  - Familiar with the entire tool set
MANAGERS AND SPONSORS
Documentation Manager

- Glue
  - Organizes personnel
  - Manages expenses
  - Provides training
  - Purchases tools
Sponsor

- Cheerleader
  - Advocate for the DITA adoption project
  - Aware of the benefits of DITA
  - Familiar with current content development processes
  - Represents the team
Project Manager

- Big Cheese
  - Manages resources
  - Manages time lines
  - Plans the project
  - Representative and communicator to executives
SMEs for product and content

WRITERS AND REVIEWERS
Lead Authors

- Directors
  - Manage high-level maps
  - Implement reuse strategy
  - Quick learners
  - Investigators
  - Adaptable
Authors

- Worker Bees
  - Write content
  - Follow organization guidelines
  - Quick learners
  - Adaptable
SMEs as Reviewers

- Experts
  - Review content for accuracy and completeness
SMEs as Authors

- Information Source
  - Contributors
  - Follow organization guidelines
  - Quick learners
  - Adaptable
ROLES BY PHASE

Investigation  Selling  Pilot  Adoption  Continuous Improvement
Investigation Phase

- Gather information to:
  - accurately estimate
  - plan
  - build your business case for subsequent phases

- Start developing content strategy, evaluating content, looking into budget and tools

- Gather baseline metrics to compare against

- Content Management Specialist
- Project Manager
- Documentation Manager
- Publishing Expert
- Localization
- UX
- Conversion
- Content Strategist
- Lead Authors
Selling Phase

- Communicating the vision, business case, and ROI for DITA adoption to senior-level management and key stakeholders
- Getting corporate support and $
Pilot Phase

- Convert initial content, select tools, run proof of concepts with tools
- Develop draft publishing pipeline and draft user experience
- Ensure ROI can be met
- Get corporate approval to adopt

- Content Management Specialist
- Conversion
- Content Strategist
- Documentation Manager
- UX
- Lead Authors
- Publishing Expert
- Sponsor
- Editor
- Trainer
- Localization
Adoption Phase

- Full steam ahead
- Convert bulk of content
- Train everyone
- Implement full content strategy
- Work on all publishing pipelines
- Continue to develop user experience
- All hands on deck
Continuous Improvement

- Keep developing/improving content strategy
- Gather user feedback, grow community
- Streamline processes
- Keep validating ROI and metrics

Content Management Specialist
- Conversion (if needed)
- Content Strategist
- Technical Communication Manager
- Lead Authors
- Authors
- SMEs as Authors (if desired)
- SMEs as Reviewers
- Publishing Expert
- Technical Editor
- Trainer
- Localization
- UX
- Sponsor
Summary

- DITA adoption success requires many small steps
- Filling the right roles is essential, even if people are wearing many hats
- Collaboration between key roles is essential
  - Shared vision, fully invested
  - Great minds working together = impressive results
Resources

- OASIS DITA Adoption: http://www.oasis-open.org/committees/dita-adopterption
- Articles: https://www.oasis-open.org/committees/dita-adopterption#expository
  - Roles and Responsibilities Feature Article
  - XLIFF Feature Article
THANK YOU