

Landen Consulting Case Study: Online Help Content Development, Complex Content Management, & Project Management

The Challenge:

The client was converting a primary transaction-processing system from a legacy green-screen environment to a web-based application, and engaged Landen Consulting to help develop the content for the context-sensitive Help system. The Help requirements included several complex components, including content objects that could be shared/re-used across different user types/roles, state-specific content, and a complex technical environment. The client's software and business environment were inordinately complex, with multiple nuances to how the content was sourced and presented, along with significant regulatory and compliance requirements that required us to develop new approaches for identifying and presenting the Help content.

The challenge: Develop the approach for providing Help content; create a content sourcing, authoring, and publishing strategy that meets the client's business and regulatory requirements; ensure that the Help content aligns with the technical constraints of the client's system environment, and staff & lead a content authoring project team throughout a challenging multi-year implementation that would require the authoring of thousands of individual content objects/topics.

The Solution:

We started the project by performing a comprehensive analysis of the system being targeted for help, the various stakeholders' expectations for the online Help content, and a review of the technical environment and constraints that would affect how we approached the content authoring & publishing effort.

Our analysis uncovered several complexities that helped shape the requirements of the Help content:

- State-specific content
- Different content requirements across different user types/roles
- Several different levels/tiers of Help content requiring new approaches for page layout and presentation design
- Multiple sources, versions, and approaches to identifying and adapting source material
- A technical environment which required us to create a customized Help authoring/development environment

During our analysis, we realized that the basic content-base that would need to be authored (to support the initial test of the system in one pilot state) consisted of approximately 150 Help pages, with each Help page containing content for between 2 and 50 individual fields/topics, the initial content authoring effort resulted in several thousand Help topics (content objects) being authored.

To support the client's complex regulatory/compliance environment, many of these Help topics would need different versions of Help to be authored for each state and user group as the application was implemented countrywide.

As the system rollout expanded to include the entire country, we were retained to staff and manage this complex content-authoring effort, which included developing a repeatable process for analyzing, sourcing, and authoring the Help content for each subsequent state, including the complex effort of mapping content-object reusability across the scores of possible content permutations & combinations. We then helped the client negotiate the complex process for securing approvals on the content (by multiple audiences including business owners, technical owners, product development, and legal). Finally, our Landen Consulting team published the Help content into the Help publishing environment, and partnered with the systems developers to test and validate the Help content and related system functionality.

This was a complex multi-year effort, in the middle of which we were faced with the challenge of migrating all of the Help content from one platform to another, which we helped the client accomplish with no adverse effects to our end-users.

The Results:

At the conclusion of the countrywide rollout, we had successfully authored and published tens of thousands of Help topics accurately and on-time, and were an integral part of helping ensure user adoption of the transaction-processing application that our Help content was supporting.

To position the client's in-house team for success after Landen Consulting's involvement had concluded, we developed automated content management tools to help reduce the client's long-term content maintenance workload.

The resulting Help system (and our robust approach to providing end-user application support) was widely viewed as setting a new standard in providing comprehensive and well-targeted support to the end user, and was adopted as the model for all subsequent application rollouts and Help systems across the enterprise.

For More Information:

For more information on the services available from Landen Consulting, call us at 847.604.8697, or visit us at www.landenconsulting.com.