PART ONE

Why Content Services?

Chapters 1 and 2 address the need for content services in organizations. Executives will find them the most relevant to an understanding of why managing content as an asset that supports strategy is valuable—and measurable. Tacticians who do some form of content and/or knowledge management will find them helpful in answering the inevitable questions regarding ROI.

Measuring the return on knowledge and content management has proven notoriously difficult, and few compelling arguments exist that justify the expense involved. Our purpose is to help you construct an argument for your organization. Vital to this is the ability to tie content services to the measurable objectives of the business, whether those objectives are "Improve customer satisfaction," "Grow revenue from new products by 10 percent annually over the next five years," or "Achieve business unit profitability by Q3." These first two chapters should help you construct the business justification in preparation for the how-to information in Part Two.

CHAPTER ONE

Content Services and Business Performance

> For the last two weeks I have been using the intranet at Harvard Business School every day. You probably would not realize how much school has changed. The computer in my dorm room is on all day, so I can see my personal daily and weekly schedule online, linked to all my course assignments and scheduling information. By assignments, I mean HTML pages with questions, reading materials, company Web sites, links to stock and analytical information, plus video clips of interviews and case studies, all served dynamically from a database. Instructor emails update students the evening prior to class, and all students share class notes via email.
>
> —Alden Globe, email to a friend from Harvard Business School, July 1999

Harvard Business School spends about 10 percent of its revenue on the school's intranet, which students use for course preparation, research, class calendars, messaging, and more. The system serves up 5,000 video sessions per day showing clips related to HBS case studies, and electronic documents are now the official versions of record. Once, during a presentation, a student asked Dean Kim Clark to talk about return on the HBS intranet investment. Without hesitation he answered, "We needed to make this

investment or face going out of business. The return is infinite; it's a question of the continuing relevance of this institution."

Dean Clark's understanding of his intranet differs from that of many senior-level managers in large and medium-sized organizations. For most, intranets and their content are mere utilities—nice-to-have tools that make it a little more convenient to share information throughout the organization. We doubt that, if asked, they could name the most frequently accessed documents; they certainly wouldn't be able to name the content that should be there but isn't; and they typically aren't frequent intranet users. The reasons are many, but the difference between Dean Clark's strategic view and others' less-than-strategic view has to do with the role content plays in the respective enterprises.

As an academic institution, HBS is all about the production and circulation of information and knowledge, which is largely what academic institutions do. Their business is creating knowledge and passing it on to students and other constituencies, and thus the ability to catalog that information and make it easy to access is an essential competency that ensures the "continuing relevance of this institution," as Dean Clark says.

Organizations like HBS are pioneering new ways of combining content and technology. For them, content isn't merely incidental to the operations of the enterprise but is rather a key asset that must be managed at least as well as other businesses manage land, labor, money, and capital equipment. These organizations have adopted new technologies along with disciplines formerly considered beyond the scope of business management. Library sciences, taxonomy development, and corporate journalism have emerged as necessary skills to help content-centric enterprises gain better control over their content.

But what organization doesn't have content that plays a vital role in its operations? All companies produce content—documents, videos, charts, graphs, spreadsheets, and so forth—some of it absolutely essential and some incidental. Accordingly, every business can learn important lessons from the content-centric companies. Finding the important content and managing it as a corporate asset can drive significant efficiencies throughout any operation.

Content as Asset

The experience that customers, employees, investors, and partners have of your company comes largely from the content on your intranet, extranet,

and public Web site. Knowing what content is truly valuable is the starting point for deciding what technology you need. On thing is certain: Buying a search engine and a corporate portal doesn't automatically give your intranet and extranet users a MyYahoo!-style experience.

The fallacy here is that the technology creates the solution. Companies don't realize that the technology driving MyYahoo! is only a small fraction of its power. The real muscle is the 3,000 people behind the scenes ensuring that you have quality content to personalize, browse, and search. They maintain a taxonomy—entertainment, financial news, tech news, and the like—that is relentlessly adhered to by authors and publishers. Anything published must fit into these categories so that you can subscribe to it and search through archives. If MyYahoo! were simply a technology operation, it would have failed long ago.

The lesson here is straightforward: *The management of enterprise content will fail unless it is intimately linked to business strategy.* Without this connection, you won't have the sustained involvement and sponsorship necessary to make these initiatives successful and you won't be able to measure their results.

Let's take HBS as an instructive example. When Dean Clark talks about the intranet as an essential asset that ensures "the continuing relevance of this institution," he can't mean the technology alone—if the intranet delivered the wrong course schedules, the wrong assignments, and the wrong case studies, it would be useless. Rather, he means the combined power of quality content and intranet technology. In this sense, technology is the easy part. Adapting formerly paper-based processes to it is the real challenge, and it can be successful only insofar as it is a key part of the organization's strategic direction. At issue for Dean Clark is improving and extending the quality of the most important process to the institution: the creation and transfer of knowledge between instructors and students. This transfer occurs most intensely in the classroom itself, but efficiency in the classroom comes from the preparation that takes place before the students arrive there. For that reason, the intranet is designed to improve the classroom experience by improving the students' ability to prepare for it, and this purpose drives its organization. Course assignments and case studies are easy to find; the student's individual schedule is personalized and served up automatically. Students handle administrative tasks online, which minimizes the need to stand in lines that takes away from time spent learning.

The Content of Relationships

Another important issue in this example is how content influences nearly all facets of a student's relationship to HBS. The PC is on in his dorm room all day because it is the primary device for managing this relationship. The student experiences HBS in large part as streaming content—between him and his peers, his instructors, research archives, and administrators.

For example, collaboration occurs via email in many instances, such as sharing class notes and preparing presentation materials, and even when the collaboration is face to face it usually involves an official HBS case study. Students, in other words, don't collaborate absent of context. Rather, they have assignments, often consisting of HTML pages and links to Web sites and video clips, that serve as the basis for interaction with instructors. All of this is managed by HBS to make the classroom experience more productive.

Even on the administrative side, course schedules and other paperwork necessary to a student at HBS are handled online. Why spend time at the registrar's office if you can handle these administrative tasks from your desktop PC? The effect is more time spent on education and less on bureaucracy.

The HBS example illustrates some very important points about managing content:

- Enterprise content mediates most relationships between people and organizations. Even when the interaction is face to face, some form of content is driving or supporting it.
- Content is valuable in relation to strategy. HBS's purpose is to facilitate knowledge transfer among its students and professors. The intranet serves that purpose by minimizing administrative time and maximizing the students' ability to prepare for classes.
- The quality of the content significantly enriches the students' (and the instructors') academic experience.

The HBS's intranet is a good example of an asset-based approach to enterprise content management. It is essential to an organizational strategy that maps directly to the central purpose of the institution: the creation and transfer of knowledge.

Understanding how content can facilitate business strategy is the starting point for treating it as an asset. Content can include structured data in data warehouses, unstructured data (documents and presentations), and tacit knowledge (as defined in the Preface) in the heads of experts. It also includes

methods for searching, delivering, and publishing this information. Giving consistent access to content to your key audiences is essential to managing your brand because it affects the experience these groups have with your company. In that light, it should be easy to see that the ROI of enterprise content management is tied to the success factors of your department, workgroup, division, and enterprise.

Creating Relationships through Content

Say an employee has devised a process change that leads to a 30 percent reduction in product defects. It is a fairly complex change, so he writes up a white paper and sends it to his colleagues across the globe. All agree that a workgroup for creating and sharing information would be a good idea. While the employee and his colleagues have never met face to face, this workgroup interaction yields several ways to reduce defects by another 15 percent.

Or say a group of healthcare customers for a complex software system has formed an independent users group. They hold annual meetings in Atlanta, but most of their interaction is via a Web site where they share tips and tricks for getting more out of the software they have purchased. This interaction has saved hundreds of thousands of dollars in support costs across all the participating companies.

What Is Content?

To this point, we have talked a lot about *content* without really defining it. As a descriptive term, "content" is being stretched to its limits as new ideas and uses for information emerge from the Internet and personal, mobile technology. For example, "user-generated content" is created by a group who shares common interests and voices opinions on Web sites like epinions.com, Amazon.com, and Ebay. Your physical location in space at this moment can be a form of content as GPS-enabled mobile devices offer Yellow Pages, walking directions, maps, instant messaging, travel information, and city guides.

For our purposes, "content" is shorthand for messages or subject matter *embodied* in some definable format—email messages, spreadsheets, word-processing documents, videos, reports, and the like. This notion of "embodiment" is essential to discussion. To make it more comprehensible, we need to differentiate content, information, data, and documents, as illustrated in Figure 1.1.

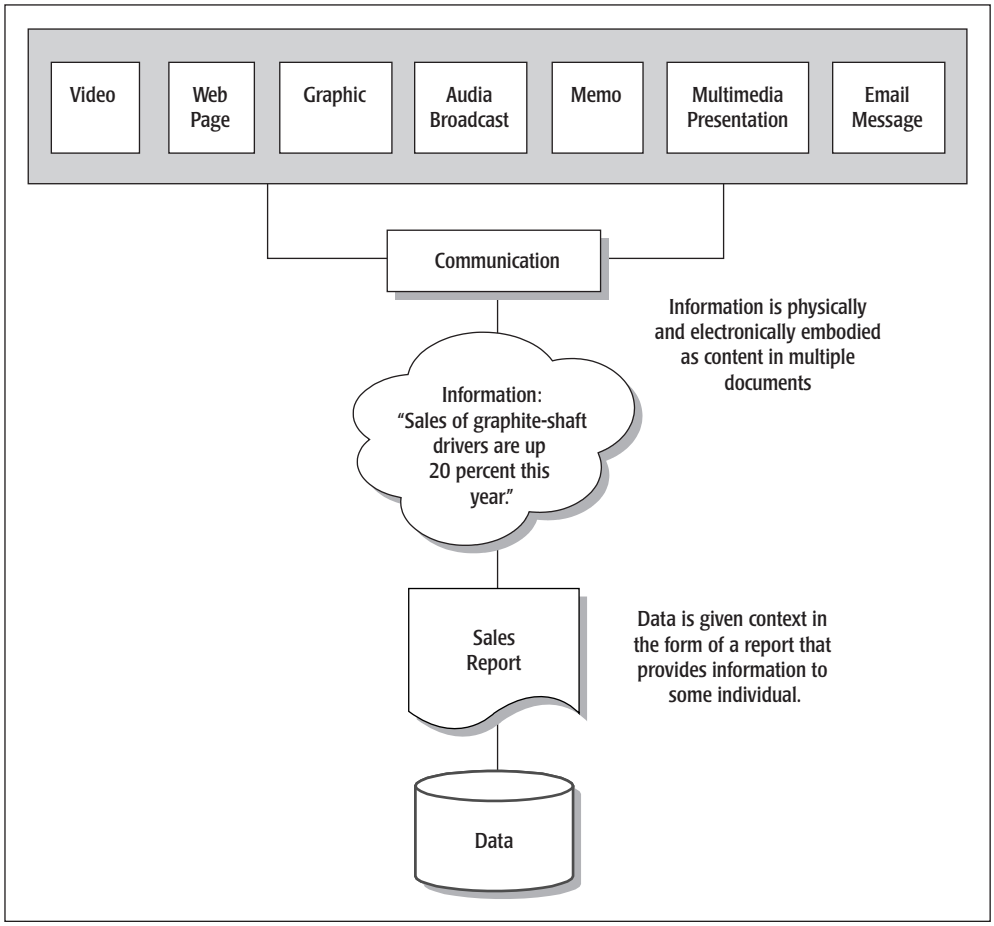

Figure 1.1 Content Forms

Information is abstract in the sense that we can think of it as independent of its form. For instance, "Sales of graphite-shaft drivers are up 20 percent this year in the Rocky Mountain Region" is information. It can be embodied in a number of *documents*, such as a video address from the regional sales vice president, a report generated from a database query, or a memo from the regional sales vice president to the chief executive officer. Although theoretically independent of its documents, however, information isn't practically possible without some form of embodiment, whether a document or something more ephemeral like a conversation—it has to live in some shape or form. Even a verbal statement that isn't documented is an embodiment.

Information can be managed only when it is embodied as content, which represents a specific combination of information and a *manageable* document. An ephemeral statement not embodied in a document that can be captured and stored isn't manageable and therefore isn't "content" in our use of the term. Rather, the information must be captured in a medium that can be made available (physically or electronically) to those who consider it interesting or useful. Content can be classified, shelved (physically), filed (electronically), tagged with metadata, and so forth.

As an example, consider the rollout of a new brand management campaign in a large technology company. The company has spent a great deal of time developing a new brand message along with new logos, corporate colors, and other necessary elements. As part of the campaign, all employees are educated on the new brand message, which will be disseminated via the intranet. The same information—"Turning Ideas into Actions"—has been embodied in a number of documents—PowerPoint slides, corporate brochure (print and pdf), video, scripts. These documents allow the same message to be embodied, managed, and disseminated as individual pieces of content for the benefit of all relevant audiences.

We consider *data* to be "raw," unlike information. A collection of data in a set of relational tables certainly has an embodiment—the table structure—but it doesn't exist as information until it is accessed and arranged by a query or some other logic that puts it into a meaningful context, usually in answer to a question: "How are sales of graphite-shaft drivers progressing in different regions?" The query turns the data into information and renders it in some document as content.

Measuring Return on Content

In the volumes of literature on knowledge management (KM), the study of return on investment (ROI) has yielded less than compelling results. For some, the issue is no longer relevant, while others have tried to attack it from myriad perspectives—both quantitative and qualitative. As we discussed in the Preface, the connection between content management and knowledge management is obvious. As a result, the ROI problems of knowledge management have been carried over to content management, and to understand them we need to look at why the ROI on knowledge management has been so difficult to nail down. With that understanding, we will try to cut through

this dead-end discussion to arrive at a more useful view of how effective management of content (as a form of knowledge) can yield positive qualitative and quantitative returns.

Health maintenance organizations (HMOs) are struggling with very thin profit margins (if they are making any profits at all) because of the rising costs of healthcare. These costs are largely out of the HMOs' control, so they must look elsewhere in the organization for cost containment. Administrators struggle mightily with information management. Every area, from sales to contracts to service, is intensely dependent on accurate information. More often than not, this information should be shared across the departments, but it isn't.

For example 200,000 letters communicating a policy change have gone out in mass mailings to HMO's insured members, but member services knows nothing of the change, not to mention the letter. Confused (and irate) members call looking for clarification, while member services representatives remain in the dark. Table 1.1 details the total costs of communicating the policy change.

A simple process change in which member services is notified three days before a mailing goes out can help the representatives prepare for the inevitable spike in phone calls. Better yet, preparing a Frequently Asked Questions document ahead of time can make it easy to answer members' questions, further reducing the additional $55,000 of lost productivity.

Table 1.1 Communicating Policy Change Cost

Number of letters	200,000
Production and mailing cost of one letter	$1.50
Total Cost of Mailing	**$300,000**
Number of calls to call center	10,000
Duration of call	15 minutes (.25 hours)
Hourly cost of member service representative	$22
Total Cost of Response	**$55,000**
TOTAL	**$355,000**

Knowledge Management and Measurement: A Literature Review

The origins and development of knowledge management as a business topic have hindered a fruitful discussion of how knowledge can yield bottom line results that can be validated through accurate measurement. A look at the seminal books on this subject helps us understand why this is the case.

The first problem that knowledge management faced was its presentation inevitably, as a new management philosophy akin to TQM, re-engineering, learning organizations, and the like. This was because the key books on the topic were preoccupied with convincing readers that knowledge needed to be treated as an asset that should be managed just as land, labor, and capital were. While the management techniques and "best practices" for managing these familiar assets were mature, those for knowledge were introduced as something wholly different and autonomous.

Thomas H. Davenport and Laurence Prusak wrote about "knowledge markets" in *Working Knowledge: How Organizations Manage What They Know*; Ikujiro Nonaka and Hirotaka Takeuchi elaborated on the "knowledge spiral" in *The Knowledge-Creating Company.* Along with Thomas A. Stewart's *Intellectual Capital: The New Wealth of Organizations*, these books set the parameters for how knowledge management would be subsumed into the vocabulary of management in the United States. As a result, they profoundly affected our ability to understand and measure its ROI.

The language of knowledge management has been remarkably consistent. The topic came into vogue after 1995 with the publication of *Knowledge-Creating Company. Intellectual Capital* appeared in 1997 and was quickly followed in 1998 by *Working Knowledge.*[1] In these books the central argument was that the collective intelligence (i.e., knowledge) of an organization was a new kind of asset that must be managed for the strategic benefit of the organization. The focus was therefore on describing the very special management techniques necessary to harness this new asset to create "new wealth" and "innovation."

With this focus, the authors had no choice but to start with some discussion of the nature of knowledge. The first chapter of *Working Knowledge*,

1. Journal articles on knowledge management had been appearing for quite sometime prior to 1995. A collection of the most important ones was published by the Harvard Business School Press in 1998 as *Harvard Business Review on Knowledge Management.*

What Do We Talk about When We Talk about Knowledge?, spends a great deal of time separating data, information, and knowledge. The *Knowledge-Creating Company* begins with a long discussion of the competing epistemologies of Plato and Aristotle, moves through the Enlightenment, and ends up with a brief discussion of Heidegger's notion of *Dasein*. At issue was grounding the discussion in knowledge as something unique and special. Only by establishing this could discussion of the proper management techniques for this most unique asset begin.

Because these books spent so much time defining the qualities of knowledge, business strategy took a back seat, creating confusion as the topic matured. For instance, Davenport and Prusak, after defining knowledge, make a fairly simple statement: "Knowledge can and should be evaluated by the decisions or actions to which it leads." Here was a step in a necessary direction: the need to attach knowledge management practices to strategic business objectives. Knowledge is valuable only insofar as it leads to decisions and actions deemed valuable and productive to the business. The authors continue with their central argument that knowledge is a unique asset that needs special management techniques: "We've observed and analyzed over a hundred attempts to manage knowledge in organizations. To the managers of most of them we've posed the question, 'How do you make the distinction between data, information, and knowledge?'" (p. 6). However, if their interest was truly with the value of knowledge as an asset, we would have expected a different question: "How do you know what knowledge is of most value to the organization?"

Stewart makes a similar move in *Intellectual Capital:* "There's a vital lesson here: *Knowledge assets, like money or equipment, exist and are worth cultivating only in the context of strategy*" (p. 71; emphasis in original). But this point is immediately dropped and no systematic argument is made for showing how to link these assets (i.e., intellectual capital) to business strategy. In fact, his next chapter, 'Recognizing Tacit Knowledge,' abruptly returns to the central concern, which is to define the essential qualities of knowledge.

We aren't criticizing these books for not pursuing a link between knowledge management and strategy. Their authors were making the necessary first steps in introducing knowledge as a strategic asset, and they rightfully spent their time discussing the special qualities of intellectual capital and how to manage it. Still in their attempts to add force to their arguments, the authors were unnecessarily confused and confusing in the new assets' posi-

tioning. They elevated knowledge in such a way that it could be seen as more important than strategy. Stewart claims, for instance, that ". . . managing intellectual capital should be business's first priority" and that "Knowledge has become the preeminent economic resource—more important than raw material; more important, often, than money" (p. 6).

Davenport and Prusak add to the confusion. They begin by talking about their involvement with managers who "were admitting that they didn't have any effective methods and approaches for managing and understanding how to better use information themselves." They then turn their research to ". . . why it isn't managed well, what managing information actually means, and what kinds of specific improvements our clients could make in how they obtained and used it" (p. xii). These are very reasonable problems to address when the focus is to understand the unique nature of knowledge and information as assets. However, in citing economist Sidney Winter, Davenport and Prusak state, "If 'knowing how to do things' defines what a firm is, then knowledge actually *is* the company in an important sense" (p. xiii; emphasis in original).

So, the discussion of knowledge management as it was introduced simultaneously offered promise and confusion. The promise was that knowledge and information are intimately related to strategy and that, with new technology for better managing them, companies could improve their top and bottom lines. The confusion came with statements about knowledge as somehow more important than strategy. As a result, knowledge management could be thought of as an *independent* undertaking within a business—as if the management of knowledge could proceed unattached from strategic concerns.[2]

At that point, measuring ROI became nearly impossible. Typical financial metrics seemed inappropriate—return on capital employed (ROCE) being the classic example. Proving that a new piece of capital equipment could yield cost reductions through improved productivity was easy, showing that automating accounts receivable could reduce errors and shorten "days sales outstanding" (DSO) was a no-brainer. However, the benefits of knowledge management were touted as competitive advantage, employee

2. Of course, these books rightly point out that knowledge management is a part of business strategy. Understanding market trends and competitors' responses to them is possible only by managing knowledge about those trends and responses. In this sense, it could be argued that knowledge management comes before strategy.

learning and retention, and other so-called intangibles. In fact, in many cases effects such as collaboration and communication were offered as valuable ends in and of themselves rather than as the means to other more strategic objectives. But how do you measure the benefit of improved collaboration? Email systems allow more prolific communication, but how do you calculate their ROI? In fact, conventional measures would put email systems at a complete loss with no positive financial return.

Content Services and Business Performance Measurement

Fortunately, the art and science of business performance measurement have matured over the last few years. The work in this area—balanced scorecards (BSC) and six sigma specifically—has helped us refocus on the link between strategy, performance, measurement, and management. These new disciplines thus help us intelligently resituate the ROI discussions of knowledge management (and consequently content services).

Beyond ROI

First, we need to distinguish between performance measurement and ROI. On the one hand, performance measurement is a discipline that focuses on identifying the metrics to precisely gauge the execution of strategy. On the other hand, ROI makes no necessary connection between the investment being measured and the direction of the business; ROI studies tend to be done in isolation. The key question is always whether or not the specific investment has returned more financial benefit to the organization than its cost. A positive return alone is assumed to be beneficial.

The essential challenges in determining ROI are twofold:

- *The boundaries around the investment itself*. Can we completely account for all costs associated with the investment—human, opportunity, capital and so forth?
- *The boundaries around the benefits of the investment*. Can we completely understand all of the benefits—financial and nonfinancial—associated with the investment?

If you can adequately answer these challenges, you can determine whether or not your gain is more than your investment. However, this kind of analysis doesn't take into account the overall benefit to the business. For instance, a new investment in upgrading a piece of equipment would allow for an increase

in the capacity of a factory to turn out product, but what if the sales force's compensation plan didn't provide adequate incentives to move the additional volume? The ROI analysis would show a positive return—fewer inputs to produce greater outputs—unless you took into account the additional inventory carrying costs necessary to handle the additional output that wasn't being sold.

ROI analyses tend to let management off the hook. In the example we just cited, what if this investment were made without knowing whether or not the market could absorb the additional capacity? A narrow view would indicate a positive impact; a broader view would show a possible negative impact as inventory stagnated in the warehouse. Neither view—narrow or broad—would reveal whether or not the investment contributed to an overall plan.

Recent work in performance measurement has pointed out the shortcomings of indicators like ROI and ROCE as measures of *business performance*. It isn't that they are irrelevant but rather that they need to be part of an overall strategy. Instead of being isolated numbers in a report, they should become key performance indicators (KPIs) that tell management how well the business is doing in executing its chosen strategy to achieve its objectives. Translating this into the example above, the ROI on the capital investment makes sense insofar as the company has determined that they are going to actively grow the market share of the product. They have set up a sales and marketing plan which the investment in the equipment directly supports, so the ROI will be measured appropriately against two KPIs:

- *Manufacturing capacity*. Did the investment allow for meeting the capacity requirements set forth in the plan?
- *Market share*. Was the desired market share increase achieved?

The first KPI lets you know if the manufacturing manager hit his r objectives. The second tells you whether or not investment in the new equipment materially benefited the business.

Return on Investment versus Business Performance A customer support center for a DVD player manufacturer implemented a new call-tracking system for $1.5 million, and within the first year the result has been a 40 percent reduction in talk time. Another investment of $750,000 will complete the job with an expected drop in callbacks of about 75 percent. The problem is that customer satisfaction has dropped precipitously over the same time. Studies show that customers feel rushed through the support process and are showing

up in the stores to get their problems fixed. This preventing sales associates from helping new customers.

Measuring Content Services Performance

As we discussed in the Preface, content services is a form of knowledge management. Consequently, it is trapped in the shortcomings of the ROI on KM discussions we have been analyzing. Let's rehabilitate this discussion in the context of content services at this point.

The challenge of determining the return on content services is understanding how it affects the organization's financial KPIs. Therefore, we need to establish a cause-and-effect relationship between content services and financial performance, and the only way to do this is to first know the financial goals of the organization and the operational plan and KPIs that support them. Then and only then can we begin to make sense of how content services can contribute to financial performance.

There are many ways to create business strategy, as the ever-growing literature on this topic illustrates. Our starting point is the balanced scorecard (BSC) as developed originally by Robert S. Kaplan and David P. Norton in *The Balanced Scorecard: Translating Strategy into Action*. We like the BSC because it provides a clear method for translating goals into metrics at all levels of the business. Kaplan and Norton are only tangentially concerned with how content can impact performance, but we see in their approach a way to, first, link knowledge management and content services initiatives to strategic initiatives and, second, to measure that performance appropriately.

Kaplan and Norton articulate the different levels of strategy that allow you to set up reliable KPIs:

- •*Financial*. What does the company hope to achieve in the given timeframe—revenue growth, profitability, cash flow neutrality?
- •*Customers*. What segment or segments of the target customer base will be addressed to achieve the financial goals?
- •*Internal business processes*. What business processes are key to the organization in achieving financial and customer objective?
- •*Innovation and learning*. What employee skills and technical infrastructure need to be in place for the strategy to be successful?

We are going to use these levels to show how content services can be a key contributor to business strategy and thus yield a measurable and meaningful

benefit. We will do this by showing how and where better access to relevant, accurate, and useful content positively affects the performance measures linked to financial goals.

Figure 1.2 shows this cause-and-effect relationship. In it we have grouped the financial and customer perspectives as *strategic* and the Internal process and innovation and learning perspectives as *operational*, which highlights the different roles that content services play depending upon which perspective is relevant. At the strategic level, content services performance is measured largely by the ability to deliver necessary information (e.g., metrics, reports, competitive intelligence, customer satisfaction surveys) to decision makers. It is also measured by the ability to communicate strategy and metrics to those who need to know (e.g., shareholders, employees, partners).

At the operational level, content services is responsible for lower-level KPIs as well as for timely, accurate content that promotes the following:

- Improved productivity, timeliness, flexibility, and quality of key processes
- Improved innovation and decision making at the front lines
- Alignment of employee skills with strategic direction

Each of these is measurable, depending on the specific goals of the organization.

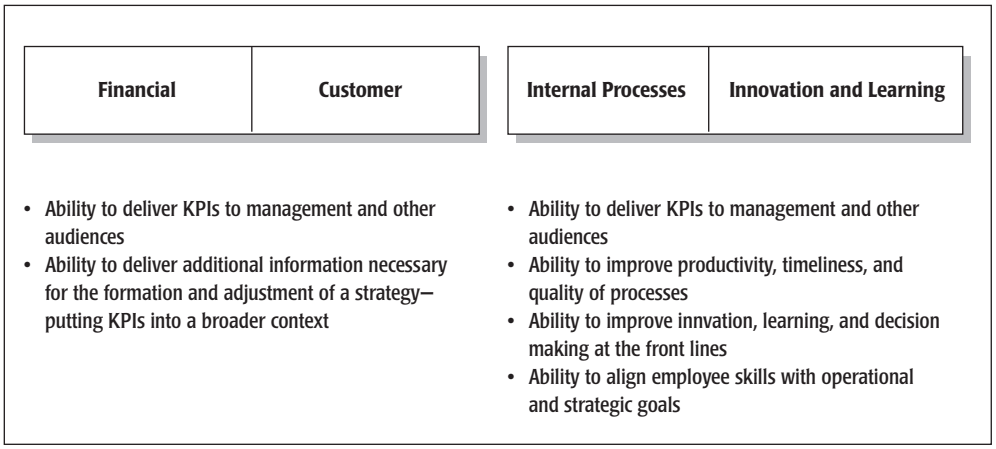

Figure 1.2 Measuring the Performance of Content Services

Case In Point: HMO Customer Service

The management team of a large HMO has its financial goal as dramatically increasing profitability over the next five years. However, because the local population will grow by only 3 percent to 4 percent annually, profitability will come from current HMO members, with only a modest increase in new ones. The managers know that a significant segment of their membership will be "aging into" Medicare eligibility over the next five years. Typically the HMO experiences high turnover at that point because it isn't perceived as a strong Medicare administrator.

To reach its financial goals, the HMO knows that keeping its existing members as they become Medicare eligible is crucial. From a process perspective, management needs to overhaul its customer service (CS) operation, which becomes a strategic process in this new business plan. Currently, customer service reps (CSRs) have an incentive to close calls quickly—the more they close, the more capacity the department can handle. However, this creates a problem with respect to potential Medicare members, so the CSRs have developed the habit of passing all Medicare-related calls to another department. Because of the incentives, this makes the customer service department look good on paper because the calls are closed by the CSRs as soon as the handoff is made. The CSRs may even feel that their customers are satisfied because they are being transferred quickly to the right person.

From a customer perspective, this creates frustration as it increases the number of times the customer is transferred before his issue is resolved. From an organizational perspective, the calls are transferred to someone who is actually not responsible for servicing existing Medicare members but whose job is to research competitors' Medicare offerings and develop competitive plans. Answering these calls prevents her from hitting her objectives.

To address these challenges, management has set new objectives and metrics as follows:

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Objective—Closed Calls with Minimum Transfers

- Retention of members as they "age into" Medicare eligibility

KPI—Transferred Calls by Issue

- Percent of members who convert to Medicare
- Customer satisfaction by age group

Management expects to see customer satisfaction increase as members approach Medicare eligibility. This is a leading indicator that should allow it

to predict any increase in members who convert to Medicare (a lagging indicator).

How can content services contribute to these business objectives? First, a true content services specialist is going to see immediately that the incentive structure for CSRs is unnecessarily burdening the Medicare plan specialist. The knowledge necessary to address Medicare issues is bottlenecking with the specialist largely because of the incentives that deter CSRs from gaining the knowledge to answer Medicare questions directly. The solution involves changing this plan (which is not the CS team's job) to get content to the CSRs and to train them to use it (which *is* the CS team's job) so they don't have to transfer the Medicare calls.

To affect the first objective—closing calls with a minimum number of transfers—the best place to begin looking is not the CSRs but the plan specialist:

- Are there common questions and answers that can be easily captured and made available to CSRs?
- Have these been documented?
- How do you roll out new plan information to the organization?
- What are you not achieving because of the support calls you have to answer?

Then you can begin looking at the content available to the CSRs:

- What information pertaining to Medicare is available?
- What training have CSRs received on Medicare?
- Can a CSR quickly identify a caller who is a Medicare member?
- Can a CSR quickly identify a caller who will soon be eligible for Medicare?
- Can a CSR easily send promotional information to a caller who will soon be eligible for Medicare?
- Can a CSR quickly articulate the advantages of their company's Medicare programs?

By helping the CSRs and the plan specialist address these issues, the content services team helps achieve the objective of minimizing transfers and therefore of increasing customer satisfaction in the target age group. To achieve the objective of retaining members, the team can take additional steps with the marketing and sales departments as well as the Medicare plan specialist. It can help develop the content necessary to reach out to members

Table 1.2 Customer Service Survey

Survey Items	Rating				
I have a good understanding of the benefits of the Medicare plan.	1	2	3	4	5
I believe the Medicare plan is superior to the other plans available on the market.	1	2	3	4	5
Customer service has helped me understand the benefits of staying with this HMO for my Medicare plan.	1	2	3	4	5

1 = strongly disagree; 2 = disagree; 3 = no strong opinion; 4 = agree; 5 = strongly agree

proactively, and it can help the specialist—who has to develop competitive plans—identify the necessary competitive intelligence.

Customer service performance can be measured through a direct customer survey (see Table 1.2) that measures level of satisfaction within the key age group. As shown, content services can help companies realize strategic, measurable business objectives. At issue is not managing content for its own sake but figuring out how it is produced and delivered serves the real interests of the business. If the content services team is effective, the results will be seen in improvement of the KPIs.

Summary

Content services can and should be a key operational component of business strategy. All businesses are, to greater and lesser degrees, content producers. Some organizations, such as universities, libraries, news organizations, and research institutions, are all about the production, storage, and circulation of content. Others, such as manufacturers and service companies, are also about content but as a means of achieving other ends. In all organizations, content is vitally important to the achievement of objectives.

The focus of this chapter was to articulate the content service/strategic business objective link. To this end, we argued the following:

- Content is a vital part of all organizations largely because it creates important relationships with employees, partners, customers, investors, and so forth.
- Managing content must be within the context of business objectives.
- The benefits of managing content as a part of strategy can and should be measurable, as long as the business objectives are measurable.

In the next chapter, we will look at poor content management practices. Such practices are rife within organizations and lead to a condition we call *infosmog*—the inability to take effective actions and make informed decisions because content is not effectively managed. All of this is in preparation for Part Two in which we discuss practical approaches to identifying and managing your company's most important content.