# Noz Urbina

## Content strategist and modeller

+20 years experience in structured content solutions with focus on adaptive and omnichannel strategies
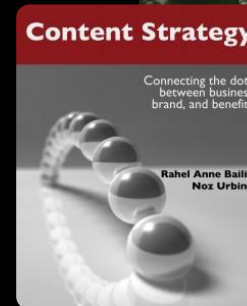
## Author

"Content Strategy: Connecting the dots between business, brand, and benefits"
(thecontentstrategybook.com)

## Lecturer

Content Strategy programme at the University of Applied Sciences, Graz, Austria

## Founder

Urbina Consulting and OmnichannelX Conference



*Sur le Pont d'Avignon*
*On y danse, On y danse*

# Widely applicable principles

Life sciences, Financial Service, High Tech, Telecoms, Manufacturing, and more

# WHAT'S WRONG?

# Analytics data are not business metrics

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In a so-called "attention economy", we have fallen into the trap of measuring what vendors and software serve up most easily: interaction data

Business metrics measure the flow of value (revenue) in, out, and around the brand

# What is a business metric?

Strategy

———————————————

KPIs
(Key performance indicators)

———————————————

Metrics

———————————————

Data points

# What is a business metric?

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A data point measures a specific value or total in a process

- Clicks
- Downloads
- Impressions
- Likes
- Scroll depth
- Forwards / Shares
- ...

Strategy

KPIs
(Key performance indicators)

Metrics

Data points

# What is a business metric?

A metric is a data point – that may unify multiple simpler data points – that assess the success of a business process

For content…
- Usability / Actionability
- Clarity
- Accessibility
- Engagement
- Retainability
- Relevance to user task
- …

Strategy

KPIs
(Key performance indicators)

Metrics

Data points

# What is a business metric?

A KPI (Key performance indicator) is a primary business metric that directly measures progress against strategic objectives.

Every KPI is a metric, but not every metric is a KPI.

- Time-to-market
- Customer-acquisition-cost
- Cost-per-lead
- Customer acquisition / time
- Customer churn
- Customer effort score
- # of Sales qualified leads
- Customer satisfaction
- Cust. Job completion rates
- …

Strategy

KPIs
(Key performance indicators)

Business metrics

Data points

# What is a business metric?

You may have a KPI which is not directly measurable, but must be measured by proxy, because you can't get the direct data.

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Strategy

KPIs
(Key performance indicators)

Business metrics

Data points

# What is a business metric?

Strategic goals or objectives are what the organisation is trying to accomplish at the broadest level. There can be layering within these as well, like vision, mission, brand values, etc.

**Highest level**
- Move into Asian market
- Overtake main competitor

**Initiative level**
- Increase X user group's efficiency
- Make X% of users go premium

Strategy

KPIs
(Key performance indicators)

Business metrics

Data points

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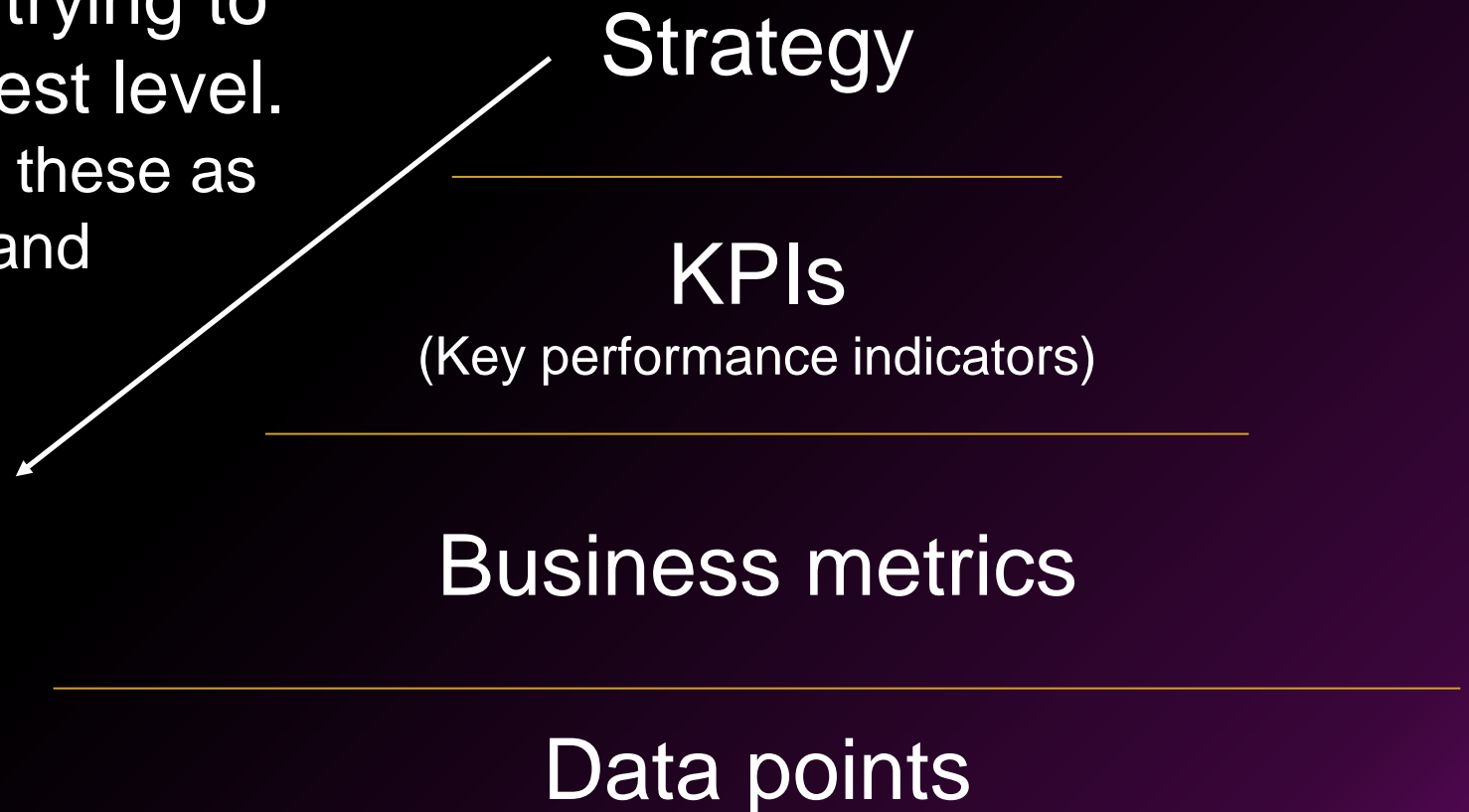
# The "big 3" metrics the exec care about

Top-level KPIs

How much are we growing?

How happy are our customers?

How cost-effective are we at serving & selling?

# WHAT SHOULD WE BE DOING BETTER?

The focus has been on what was
easiest to measure
**We need to focus on what adds real value**
To our users
To our employers
To the world

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"Measuring satisfaction on **customer journeys is 30%** more predictive of overall customer satisfaction than measuring each **individual interaction**

Customer experience survey data McKinsey & Company

" It may not seem sexy, but consistency is the secret ingredient to making customers happy.

designhill.com/events/panel-discussions/the-new-era-of-content-marke...

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strategy and customer experience. He's well known as a pioneer in customer journey mapping and adaptive content modelling for delivering personalised, contextually relevant content experiences in ...vironment. Noz is co-founder and Programme ...hannelX and its online and offine events. He is also ...ook "Content Strategy: Connecting the dots ... brand, and benefits" and lecturer in the Masters ... ...ontent strategy at the University of Applied Sciences, Graz.

Customer effort is **40% more accurate** at predicting customer loyalty than customer satisfaction.
Gartner Blog

Need Help?

**Discussion Board - 0 Comments**

You must be signed in to post a comment.

How easy/difficult it was to register for the event?

| 1 | 2 | 3 | 4 | 5 |

Very Difficult    Very Easy

hotjar    Next ›

delivering personalised, contextually relevant content experiences in an omnichannel environment. Noz is co-founder and Programme Director of OmnichannelX and its online and offine events. He is also co-author of the book "Content Strategy: Connecting the dots between business, brand, and benefits" and lecturer in the Masters Programme in content strategy at the University of Applied Sciences, Graz.
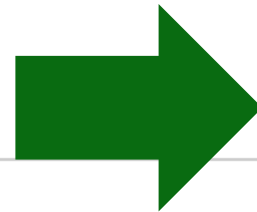
## Discussion Board - 0 Comments

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How easy/difficult it was to register for the event?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

Very Difficult     Very Easy

hotjar

Next >

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**Understand** audience expectations.

**Design everything** to meet them.

**Measure** whether you did so.

# GETTING READY TO MEASURE

# Before defining metrics, these will help…

**Journey maps**

A shared, consistent definition of what you're measuring (who, what, when, where, why?).

**Taxonomy**

A shared framework that makes numbers make sense.

# PERSONAS & JOURNEYS

Understanding and measuring the 5Ws of content

AKA Walking a mile in the user's shoes

$$\text{Journey} = \frac{\text{Questions}}{\text{Time}}$$

$$Journey = \frac{Questions \times Emotions}{Time}$$

$$\text{Journey} = \text{Context} + \frac{\text{Questions x Emotions}}{\text{Time}}$$

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$$\text{Journey} = \text{Context} + \frac{\text{Questions x Emotions}}{\text{Time}}$$

- **Who** – Persona, Segment…
- **What** – Content Type, Channel, Product…
- **When** – Time, Season, Life Moment…
- **Where** – Region, Environment…
- **Why** – Job to be done, motivation…

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$$\text{Journey} = \text{Context} + \frac{\text{Questions x Emotions}}{\text{Time}}$$

Taxonomy: trackable items →

- **Who** – Persona, Segment…
- **What** – Content Type, Channel, Product…
- **When** – Time, Season, Life Moment…
- **Where** – Region, Environment…
- **Why** – Job to be done, motivation…

# User goals

# Narrative

# Questions

# Process & channels

# Emotions

# Ideas, CTAs, & requirements

## Column headers (journey stages)
PRE-TRAINING | TRAINING | FAMILIARISATION | FIRST USE | OPTIMISATION | RESULT

## User goals

**PRE-TRAINING**
Both physicists and planners understand that knowledge of the equipment is essential for effective treatment. They are aware that in their jobs, equipment is often complex.

Triggered by a particular situation, by statistics or by regular QA procedure they want to know if there are improvements to make.

They may have had training, but they need to

- continue familiarising themselves and
- incrementally build a mental model of how the equipment works,
- get an overview of the tools and concepts in the tech, and
- understand how these fit with their job.

**TRAINING**
- get hands on with on equipment
- learn differences between current knowledge and new tool

**FAMILIARISATION**
- try to recapture knowledge lost since the training
- map new concepts to her way of working and current mental models

- understand additional terms and new concepts
- integrate the training knowledge into her SOP / way of working
- create new mental models representing the tools

**FIRST USE**
- feel confident my treatment is
  - effective
  - safe
  - state-of-the-art
- deliver excellent care
- avoid risks

**RESULT**
I feel confident my treatment is state-of-the-art.

I know my treatment protocols use the Varian systems to their full potential. No surprises. I know all the relevant stuff of my Varian equipment.

I know where to go if I have additional questions.

## Questions

**TRAINING**
- How accurate is our treatment (protocol)?
- How can I evaluate our treatments?
- What can I learn from my fellow professionals? (with and w/o Varian)
- What was it that we covered in training again? So hard to remember.
- What's the big picture of what's most important to **me** for **my** work?
- Why am I being told to start with all these new words to just read memorise? I want to understand the **processes** and how they fit into what I need to do.

**FAMILIARISATION**
- What are these terms? I keep having to click over to these "What is _____" in PDFs and then it's really annoying to lose my page and get back where I came from.
- I keep having to search for these external documents? Why can't they just give me a link to click?

- "I don't know the difference between what they call a **manual** or **reference materials** or **educational materials**! Why should I have to know what form it's in? I just want the information!"
- Why can't I see **all** the document structure's anywhere?
- What is the latest & greatest from Varian to inspire me?

**FIRST USE**
- How does it feel to use this new equipment?
- How can I understand and remember the logic of **buttons, menus and labels**?
- Is this new equipment delivering what it **promises**?
- What **benefits** am I experiencing in my day-to-day work?
- What are the **results** working with this new equipment?
- Is **my patient** experiencing new benefits?

## Process and channels

Conferences | Web search engine | Varian.com / Reps | Word-of-mouth/peers | Peer society forums>

Face to face

(My)Varian Website | Colleag... Face to f... | HowTos & webinars | IFU / Trainin... Materia... | Varian Tool

Continued...

Continued...

IFU | Patient Face to face | Patient Face to face | Varian Tool | Varian Tool

Blank

Blank

## Process description

**TRAINING**
The trainer
- prepares (customised?) training material
- leads a hands-on onsite course

**FAMILIARISATION**
The user
- reviews the relevant tasks and concepts in the IFU
- refers back to training material when needed
- makes support calls to the help line
- does practice runs on the equipment itself
- visits the Varian website for the latest or additional information

The trainer
- answers follow-up questions from trainees?

The support line operator
- answers follow-up questions from trainees?
- ...?

**FIRST USE**
The user
- works with the equipment for the first time
- is building confidence
- is creating a mental model of buttons, navigation
- experiences the first result of Varian equipment

The trainer (?)
- contacts trainees in their first week for feedback on equipment, training, documentation,

## Problems

**FIRST USE**
The topic structures are 5-6 levels deep. The ToC is 3 levels deep. The only other way to navigate the document is opening the bookmarks panel.

**OPTIMISATION**
The topic structures are 5-6 levels deep. The ToC is 3 levels deep. The only other way to navigate the document is opening the bookmarks panel.

## Sentiment

neutral | neutral | neutral | neutral | neutral | neutral | neutral | neutral

## Ideas / Opportunities to add value

**PRE-TRAINING**
NOTE: Could look at linking out to more detailed journey analyses about specific processes. For example, training, or first use, familiarisation, optimisation

**FAMILIARISATION**
1. Change label "Quick Answers" for the roles to be more semantically accurate. It is actually key terms or key concepts
   - Quick answers should be quick answers to the questions users actually ask (and if they ask these, then what do they mean by them?)
   - The product function and features names are foreign and therefore force you to read through them to understand what they are and whether they are relevant.

1. Enable going "back" when using in hyperlinks in PDF
   - The command on Windows are:
     - Alt + left arrow
   - The command on Mac are:
     - Command-left arrow in Adobe Reader.
     - Command-[ (open square bracket) in Preview (built-in viewer)
   - This could be a note near hyperlinks in a margin. We think the shortest way to say this is: "To go back to the source page after clicking a link in this...

**FIRST USE**
1. Maintain a library of DITA keyrefs to allow linking to external PDFs
2. Automate cross-references and linking (Fonto/PP Demo)
   - In a digital-first environment it would be possible to link to knowledge articles, or any new material online relevant to the current material in IFUs/CPL material and beyond

**OPTIMISATION**
1. Create personal cue cards (physical and digital) for first-time users. Distribute these in the training session.
2. Contact users in the week of their first use (email, app-notification). Actively collect feedback on equipment, documentation and training.

**RESULT**
1. The equipment recognizes a user not optimally using controls and suggests a checklist from the documentation that enables the user to learn for this specific situation.

# TAXONOMY
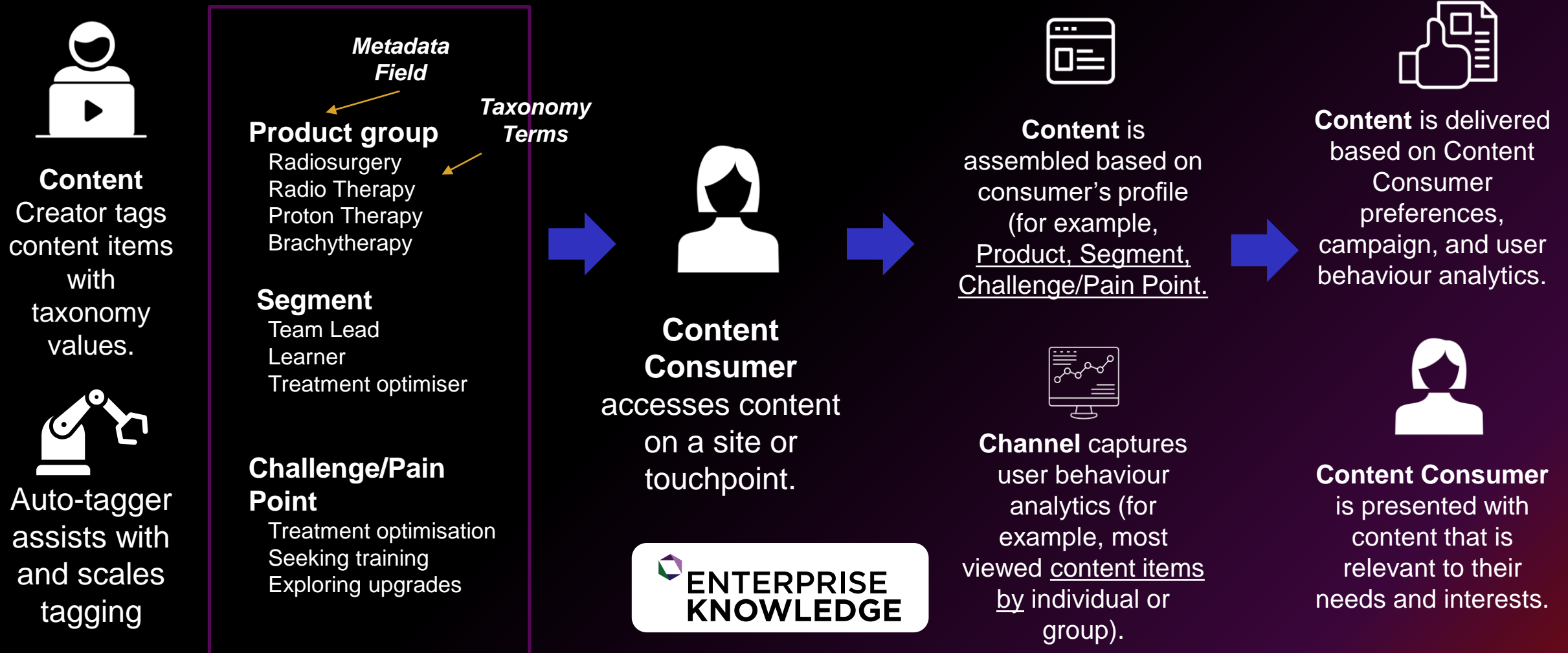
Categorising our content and concepts

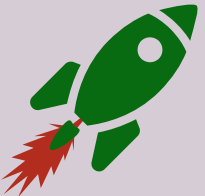# Adaptive Delivery with Taxonomy-driven Customization

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Taxonomies make it possible to *assemble*, *organize, track,* and *recommend* content based on audience behaviour analytics and preferences.

**Content** Creator tags content items with taxonomy values.

Auto-tagger assists with and scales tagging

*Metadata Field*

*Taxonomy Terms*

**Product group**
Radiosurgery
Radio Therapy
Proton Therapy
Brachytherapy

**Segment**
Team Lead
Learner
Treatment optimiser

**Challenge/Pain Point**
Treatment optimisation
Seeking training
Exploring upgrades

**Content Consumer** accesses content on a site or touchpoint.

**ENTERPRISE KNOWLEDGE**

**Content** is assembled based on consumer's profile (for example, <u>Product, Segment, Challenge/Pain Point.</u>

**Channel** captures user behaviour analytics (for example, most viewed <u>content items by</u> individual or group).

**Content** is delivered based on Content Consumer preferences, campaign, and user behaviour analytics.

**Content Consumer** is presented with content that is relevant to their needs and interests.

# CONTENT-ONLY METRICS

# Global Fintech: Engineer persona results

| Metric | Before | After | Change |
|---|---|---|---|
| **Time-to-Answer** | 125.11 sec | 70.50 sec | **42% faster**<br>(-50.6 sec, Old is 72% slower) |
| **Overall Satisfaction** | 5.9/10 | 8.61/10 | **45% more satisfied**<br>**with their experience**<br>(+2.66 points) |
| **Confidence** (in answer accuracy) | 6.3/10 | 8.9/10 | **27% more confident**<br>**in answers found**<br>(+1.77 points) |
| **Accuracy** (average) | Correct 18%<br>Incorrect 38% | Correct 64%<br>Incorrect 8% | **257% more accurate**<br>(80% less errors) |

# Big Pharma: Patient persona results

| Metric | Before | After | Change |
|---|---|---|---|
| **Overall Satisfaction** | 1.67/5 | 4.67/5 | **180% more satisfied** with their experience |
| **Organised Suitably** | 1.33/5 | 4.33/5 | **225% better organised** for their practical needs |
| **Customer Effort Score** | 1.67/5 | 4.33/5 | **160% easier** to answer questions |
| Empathy | 1.67/5 | 4.67/5 | **180% improvement** to the feeling that the content respects them as people |

Lilly
Medical Letters
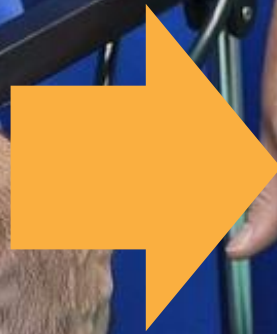
Quick answers
(Google Rich Snippet, a few lines)

Overview
(FAQ/Google KG, a few paras including Quick Answer)

Medical Letters
(learning, a few pages, including All of the Above)

# Overall content reuse - KPI

## Content Reuse Percentage



Pie chart legend:
- Verbatim reuse — 54%
- Derivative reuse — 23%
- Original — 23%

**77%**
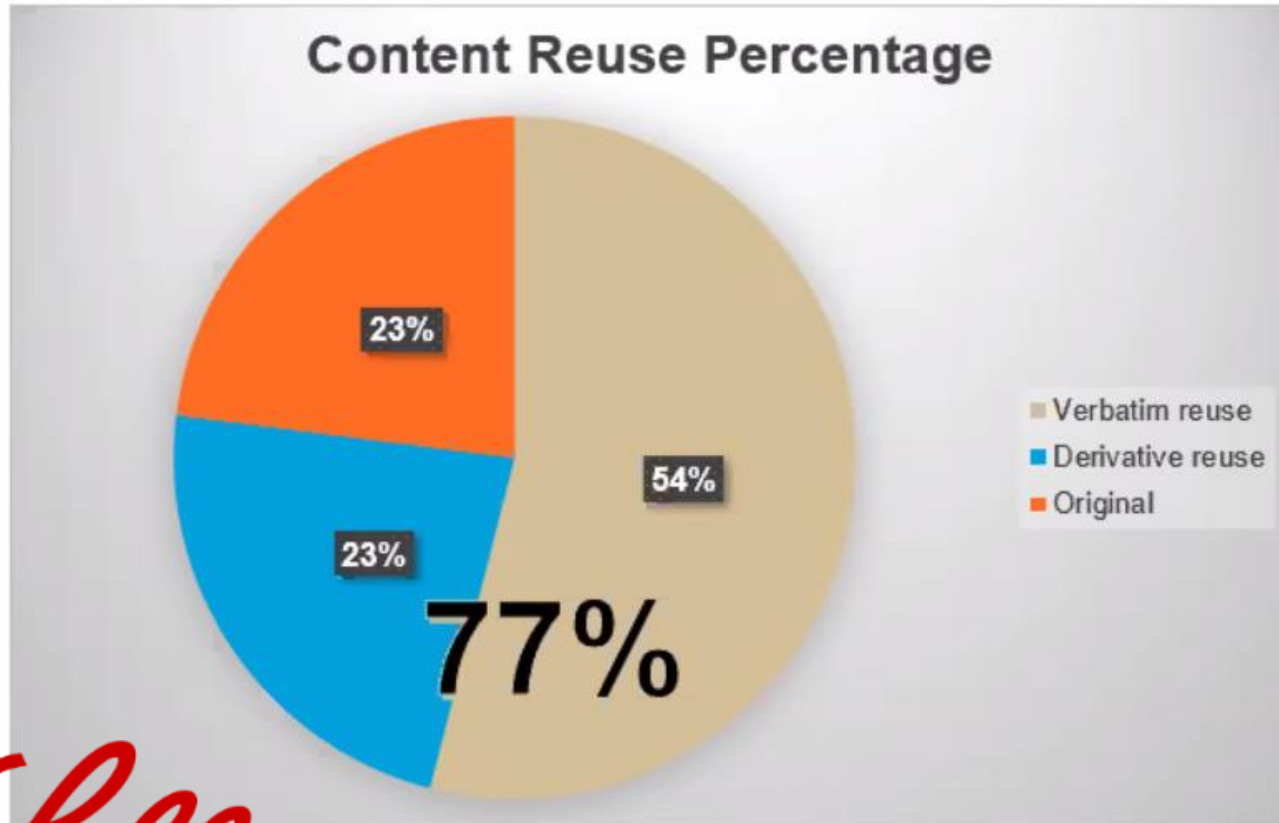
### CONTENT REUSE

- 77% on production contents
- Verbatim – Components reused without changes
- Derivatives – Components reused with changes
- Original – Components without reuse

Content reuse percentage is a KPI to calculate content creation efficiency gains

*Lilly*

# MAPPED TO CHANNEL

# 3M Skin & Nasal Campaign Cornerstone Approach

**Cornerstone** is licensed research. Original 3M content is mixed **derivative** and **additive.**

Carlos Abler

**Carlos Abler**
linkedin.com/in/carlosabler

Search  Google

Social media

Paid and programmatic  DataXū

Events

Earned media

Subscription

Media partnerships
WSJ  PBS  Harvard Business Review

Business value added content

Marketing automation/DB

Subscribe

Download

MQL

Share

Link to more content

SQL/AL

Opportunity.
Won.
Lost.
Recycled.
Syndicated.

Learning Management
Managed Community

Knowledgebase

Partner Portals
Targeted landing pages

E-commerce & channel

Brochureware and solutions-selling content

Product catalogs

3m.com / Partner / eMarketplace

Carlos Abler
linkedin.com/in/carlosabler
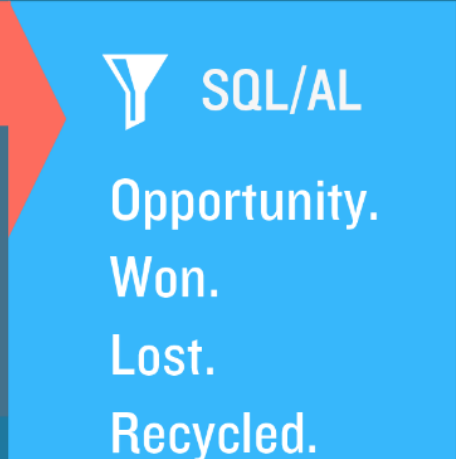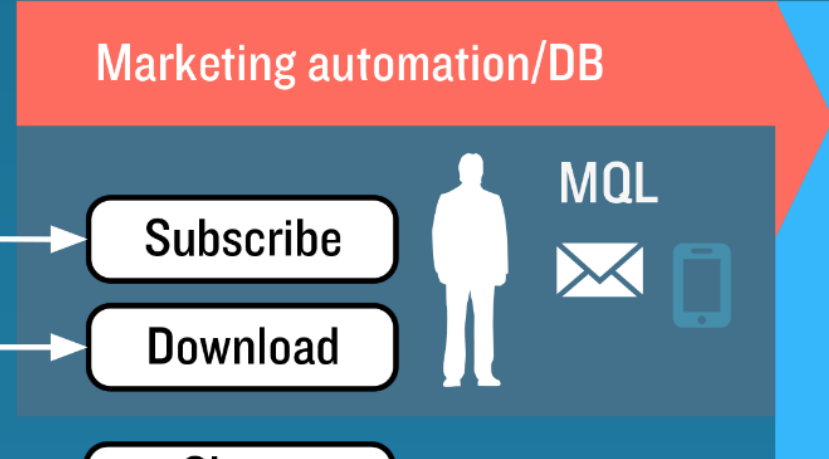
Search  Google

Social media

Paid and  DataXu

Marketing automation/DB

Subscribe  MQL

Download

SQL/AL

Opportunity.
Won.
Lost.
Recycled.

**Metrics**

| +796% | MKT. QUALIFIED LEADS |
| +32% | SALES ACCEPTED LEADS |
| +50% | SALES |

**Data points**

| +1060% | EMAIL SUBSCRIPTIONS |
| +3646% | ENGAGEMENTS |
| +6090% | IMPRESSIONS |
| +1284% | SITE VISITS |
| -65% | COST PER SITE VISIT |

# Correlate content metrics with business outcomes

How does content engagement correlate with leads and deals?

How are we doing on CES and CSAT with engaged customers?

How much are we lowering costs/reusing across regions, scenarios, channels, audiences, etc?
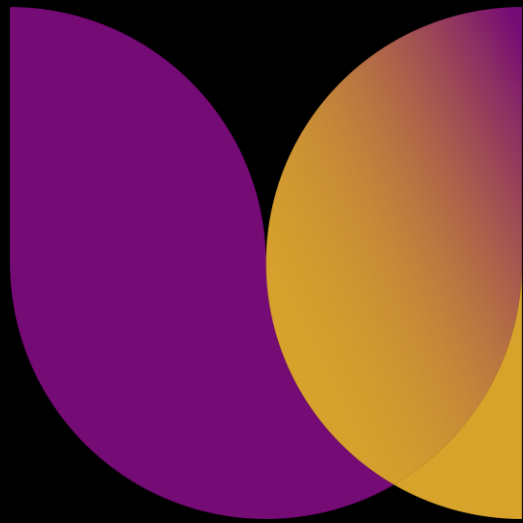
# DISCUSS

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OMNICHANNELX CONFERENCE

urbinaconsulting.com

omnichannelx.digital

# Discuss Metrics, CJMs, and Taxonomy

- Do you have these in place? If so, are you using them?

- Who would you involve in such a process?

- Do you think it would actually help?

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