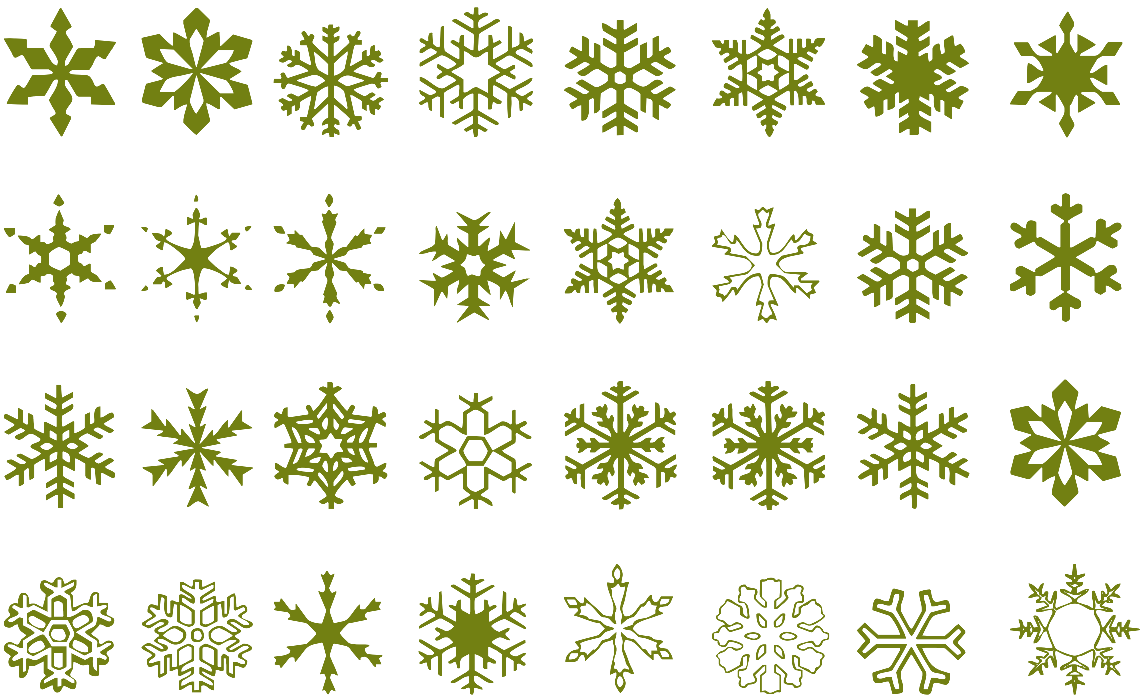
TIMAF
The Information Management Foundation

BEST PRACTICES

Volume 1

INFORMATION MANAGEMENT Best Practices



Bob Boiko, Erik M. Hartman (ed.)

Information Management
Best Practices - Volume 1

"Regardless of the kind of information you need to manage, this book will make your projects better."
BOB BOIKO, Washington University

"The TIMAF organization proves its dedication to raising the bar for information management practitioners everywhere. It has assembled the best thought leaders in the field to share insights from case studies which are both actionable and universally relevant. Even the most experienced IM professionals will learn something new with each turn of the page."
SCOTT LIEWEHR, President CM Professionals

"It is, quite frankly, the best collection of case studies and solutions I've run across and will be an invaluable resource for our readers. The reports are solid, practical and real-world examples of how to do things right."
HUGH MCKELLAR, Editor in Chief KM World Magazine

09

Jim Larkin
Bill Birney

Managing Media Creation to Meet Business Requirements

Using Videos to Enhance a Software Product

JIM LARKIN is founder and CEO of Resources Online, a Seattle-based content and production company established in 1995. As CEO, Larkin maintains strategic direction over all projects the company undertakes. Prior to founding the company, Jim worked as a technical writer and editor. In the 1980's Jim worked on the research staff at the Institute for Research and Information in Scholarship, Brown University, which, among other activities, built and deployed an early fore-runner of the World Wide Web.

BILL BIRNEY is a technical writer, audio engineer, and audio and video producer. Before joining Resources Online, he spent five years on the Windows Media team at Microsoft Corporation, and has written, produced, and done post-production on numerous projects throughout his career. He currently leads video production at Resources Online.

ABSTRACT

Clients often have difficulty articulating the relationship between including media or interactivity in their content and the business value of that media or interactivity. They may believe that adding media adds value, based on anecdotal evidence, or because of competitive pressure or executive fiat. However, clients typically do not have hard evidence to support a decision to invest in media creation or knowledge of what sort of media would be of most value to the organization and its customers. Their lack of evidence or knowledge about the most effective types of media for their customers presents a problem for consultants who create the media: If we do not know what clients really need, how will we know if we are successful?

We have found that one of the most valuable services we can provide is to help clients articulate what they need, what investments are worthwhile, how to respond to their customers and meet those customers' business needs, and, ultimately, how to determine if the effort is successful. Sometimes this service requires us to challenge our clients to produce substantive evidence about their customers' needs, pressure from competitors, or their assumptions about the benefits they hope to get from media projects. Even if no substantive evidence exists, and the client's answer about the driving force behind the project is "Because my VP says so, and it is successful if my VP likes it," it is still useful for a media producer to have that information explicitly. Ultimately, we align the stories a business wants to tell with a process that reflects its business goals.

Background

Many of the business decision makers (BDMs) we interact with know they want media-rich websites. Creating and using media is common today because of the ubiquity of devices for capturing pictures and video, devices for playing media-rich content—including mobile phones and netbooks—and high-speed bandwidth. Community-created media ranges from personal content for sharing among friends to sophisticated entertainment. This is the context within which business media exists, and it is differentiated from other sorts of media (such as that created for entertainment or education) primarily by the fact that business media serves some goal of the business that creates it. However, the relationship between media and the business goals that it serves is not always clear.

In this article, we are making a few assumptions:

- First, the media we create is related to some set of business goals. We are defining business goals as "the desired response or action of the audience that interacts with the media". This desired outcome may be an obvious business outcome, such as convincing the audience to buy something, or it may be more nuanced, such as helping someone change a perception, stop a harmful behavior, or learn how to do something (thereby avoiding an expensive call to tech support). All of these and more are "business goals". We are not talking about media created for entertainment or personal communication.
- Second, readers of this article are those who create media for clients (who have business goals), or who are themselves the clients or BDMs who hire media production teams.
- Third, business goals are not always explicitly expressed, but projects will be more successful if they are.
- Fourth, media is a communication method that competes with other communication methods. A software company that supplies information to customers to teach them how to use the company's products, for example, has choices and problems. The company may provide static information that is complete and searchable, but users still call technical support. So the problem is not managing content—the problem is understanding how to best serve a customer need. If the goal is to reduce customer support calls, can video content help? Is it more interesting, educational, and engaging, and if so, to how many people? And, ultimately, how well does it reduce the need for customer support cost and increase customer satisfaction compared to other ways of providing equivalent content?

Successful video producers or filmmakers do more than convey information. Even in the digital age, they work in an old-fashioned, linear, and temporal medium that actively presents information in a form that is readily consumed by a viewer to achieve a particular end result. One of the most effective ways to present information is as a story. So periodically throughout this article, we mention storytelling and its use in helping maintain the relationship between the media and the business requirements of media creation projects

An effective way of creating media to meet business requirements is to take advantage of the power of stories. Information is passive content. A story is a way to package the information to make it active. Why is a story so powerful? Everyone understands the story form, and it immediately resonates with us all. Understanding what the story is or should be is the challenge we face, and meeting business goals is the standard we use to measure the success of our stories.

To deliver the right story, you proceed through multiple steps that themselves have many subprocesses. At the highest level, these steps are to:

- Identify business requirements.
- Plan the production.
- Execute the plan.
- Measure success.

In this article we do not provide detailed how-to information for each of these steps; instead we focus on the approaches and considerations that keep the focus on business goals during media creation.

THE SKILLS NEEDED TO PERFORM THIS BEST PRACTICE

The primary roles involved in carrying out the steps described in this article are the media producer, project manager or client liaison, and BDM.

- **Media producer:** An experienced media producer has experience working with other roles to produce media that fills the goals identified for the project.
- **Project manager/client liaison:** The project manager/client liaison has skills that include experience with an array of media production options, the ability to gather requirements, and the ability to understand the business goals. Depending on the intended use of the media, usability, training, and web analytics experience may be useful as well.
- **Business decision maker:** BDMs are the clients in this article. That is, BDMs buy media production services, and they are the business stakeholders who have implicit or explicit business goals that the media will address.

STEP 1: IDENTIFY BUSINESS REQUIREMENTS

Creating a good video starts with a good conversation—or a series of conversations. These conversations take place between the producer and the major stakeholders, and identify the requirements that the video must satisfy. The result of the requirements process is an answer to the question: How will we know if the media project is successful?

The notion of success for a media project is complex. The first requirements that may surface from many clients might be based on specific objectives ("We want a video that demonstrates how to use a feature of our product or that communicates specific marketing messages."), or it may be strictly aesthetic ("We want a cool, cool video, period. Oh, that shows our product....").

Less frequently, stakeholders may articulate how the videos relate to business requirements (which we use interchangeably with "business goals"). If they do not, the producer should explicitly steer the discussion in this direction. As producers, we need to challenge our stakeholders; ironically, we have some of our most productive exploratory conversations by challenging our clients' assumptions that they need our services at all. We ask, "What do you hope to accomplish with this media project, and is this the most efficient way to achieve your goals?"

The following list of challenge questions will, at least, force clients to think through the reasons for undertaking a media project. Ideally, they will produce a guiding set of requirements that will help you create the right solution. Not all questions apply to all projects (For example, not all projects include human actors.).

- What do we want our intended audience to do with our media?
  - *Not* do something else, like call tech support;
  - Like us better, or change their opinions of our company or our products;
  - Change their behavior;
  - Buy something;
  - Learn something;
  - Take some other action that we can measure.
- What are the stories we need to tell to get our audience to do what we want them to do?
- Who will provide the stories? Who will storyboard? Who will approve the storyboards?
- Will the media be localized? If so, into how many languages?
- Will the script change over time, either during production or after the initial release of the media? Will the media need to be updated?
- If human actors are in the production, what characteristics do we need them to have (demographic as well as roles)?
- How professionally polished must the voicing and acting (if any) be?
- If live acting, how many scenes and locations will be needed?
- What do we know about our target audience, and what will engage them?
- How will we measure whether the media is successful against our business goals?
  - What is the baseline? What criteria (awareness, opinion, behavior, action) are applicable?
  - How do we measure change from the baseline?
- What's the scale of the production? Will we be dealing with tens, hundreds, or thousands of individual assets?
- What will happen to the media after we're done? Will it need to be updated and refreshed in the future?
- What is our budget?
- What choices does our budget require us to make about how much media; how, when, and where we create it; and who is involved? Is our budget adequate to reach our business goals, and does the anticipated value of the result justify the investment?

STEP 2: PLAN FOR PRODUCTION

The answers to questions in Step 1 will provide parameters for your production. Here is how:

Size of the production: If your production is sizable, it is critical to create an asset management strategy at the outset. This strategy can include:

- Testing all your processes to make sure they will work as you expect.
- Establish and enforce asset naming schemes before you start creating assets.
- If you are using a Digital Asset Management System (DAM), outline your process steps and ensure that your solution will deliver.
- List each production piece, and for each piece, list each process step that is required. Look for commonality across media pieces so that you can group similar work for efficiency and minimize the learning curve.

Localization requirements: If the media will be localized, how can you manage cost? Here are production ideas we have used to manage localization costs and minimize language-specific work:

- If a production is to be localized, consider avoiding the use of live actors to voice lines. We use a series of stills so that we can easily re-voice the pieces in additional languages without reshooting, using native-speaking actors. If we do need to reshoot for cultural reasons, the original U.S. English version provides a template against which we can shoot stills of culturally appropriate models, add them into the production, and re-voice. For example, for a computer-based counseling tool for reducing human immunodeficiency virus/sexually transmitted disease (HIV/

STD) risk, we use identical animated still sequences and drop in local audio for U.S. English and U.S. Spanish versions of the videos. For a version of the video to be used in Kenya, we will reshoot stills and drop them into the appropriate video slots, along with the local voiceover.
- Make text live and editable. On-screen text should be separated from images and overlaid using your editing tools, whether you are using Adobe Flash, Microsoft Silverlight, or layered Adobe Photoshop files. Keep text live as late in the production process as possible so that you do not have as many steps to carry out for each language. For Flash or Silverlight, store text content in XML files, so that localizing and updating text is a simple matter of editing the XML file (rather than the executable).
- If your media contains images of applications or websites, consider mocking up the user interface using live text as well. It will be tedious, but if you are localizing into many languages, using live text may ultimately save time over reshooting images in many different languages. This approach may also help you if the UI text changes: you will not need to reshoot. If you are only localizing into a few languages, however, going to this extreme may not be worth the trouble.

Plan for updates: If, in six months or a year, you need to revisit and update a large portion of the media you have created for a client, you can spend a huge amount of time unnecessarily. You can save significant time if you follow the practices for efficient production described here, and you have fully documented the project with media lists, naming schemes, processes, and settings (including project files, of course). Store this documentation with the media assets and provide a complete set to your client (for safety, accountability, and because they paid for it, after all).

Know your audience: What do you know about your audience? Identify anything from profiles on media-type penetration, technical sophistication, and the audience's attitude about the business goals of your media. For our technical audiences, for example, we know that we have to make sure that each media piece is going to tell them what they want to know, so we typically tell the story newspaper-fashion. For our health care audiences, we know that literacy and state of knowledge vary widely and that younger audiences do not want judgmental lectures, so we use visually arresting beginnings that introduce a story before we get to the take-away lines.

Identify the desired impact: Again, what is the impact you want your media to have, and how will you know if that impact was achieved? Planning to track click-throughs, downloads, tech support call traffic, or even direct customer feedback on the usefulness of your media are all wisely planned at the outset, not only because these methods may need to be instrumented in some way, but also because knowing how the media will be evaluated can do wonders for focusing the development effort towards those goals.

Leverage the media type and ecosystem: You are presumably creating moving media, but how can the media use the context where it is presented to further promote the business goals? For example, if you are introducing a human persona in the media, which is streamed from your client's website, can you use the persona in other places on the site to lend familiarity and consistency to the user experience?

STEP 3: EXECUTE THE PLAN

Carrying out the plan—doing the actual production work—is not our focus in this step; instead, the focus is to identify what you can do during production to ensure that the work remains aligned to business goals. These points emphasize doing whatever you can to check the design assumptions against reality. Such activities may include the following:

Produce and test the production in as low-fidelity a version of the production as possible, as early as possible. This point may seem counter-intuitive—why low fidelity, and just what does that mean? Low-fidelity testing may be anything from mockups, to storyboards, to a simple simulation of the intended functionality of the media. This testing can show you if your production will be successful at a much earlier stage than you might imagine. In particular, you can start to see whether the stories that you are telling resonate with your intended audience. If they are not, making large or small changes in your stories at this stage is vastly easier than making them later in the production process. Anecdotally (meaning that we do not have evidence, but believe based on experience), the crudeness of the a low-fidelity prototype actually removes the distraction of a more polished experience, and forces your test audience to focus on the stories. A case in point: for a computer- based health-care product that Resources Online created, we created paper prototypes at an early stage. The prototypes were little more than sketches of the key interactions intended for our product. We printed them out and then mounted them under a clear plastic sheet on a cardboard box —our "computer"—and did informal testing on the street to get naïve feedback on the product. What we learned directly affected the design of the product at a very early stage, before we built the UI or functionality of the product.

Test against the intended audience, not just the clients. Often, clients give direction based on little more than personal preference or gut feel. If you can, try to determine what really makes a difference to the intended audience, and focus on those sorts of changes. For example, is the language used in the production appropriate and credible for your audience, or is it merely politically acceptable for the business? (We encountered this tension when we created sexual health media funded by government entities, for example.)

Test usability iteratively. Testing against business goals should continue as the project proceeds.
For example, you might proceed from the low-fidelity tests described in the preceeding paragraphs to more formal tests of taxonomy, user interface design, and information logic. All of these tests can be done early in the project, when the costs of making changes is much lower.

Make testing value-neutral and relate it to business goals. Often, our clients ask for changes based on personal preference. Sometimes our job is to challenge these preferences. We try to do this by focusing on the testing and changes that will really affect business goals in as specific and particular a way as possible. We are not always successful—sometimes personal preferences (or institutional limitations our clients must work within) work against this goal. But even in these cases, we can at least make explicit the reasons that drive particular decisions.

STEP 4: MEASURE SUCCESS

How do you know if your media project is successful? If you have defined your requirements well, then your measures of success should fall in line with the requirements and business goals you established in Step 1. And, in fact, measuring success is an essential part of establishing each business goal. In other words, you cannot have a goal without some way of measuring how well your production has met that goal. As a media producer, if you and your clients have identified requirements and business goals, then you have an interest in how success metrics are defined and evaluated.

So, depending on the type of media and its purpose you can use the following measures:

- Web metrics such as time on a site, click-throughs, and downloads may be key indicators. Establish baseline numbers and performance goals.
- Reductions in calls to support, customer satisfaction ratings, trial product downloads, and viral indicators such as YouTube hits. If baselines are available, by all means use them.
- For perception-changing campaigns, devise and collect pre- and post-measures.
- If you are trying to reduce technical support calls, measure call rates, but also look at what the calls are about and whether, for example, callers viewed your video and if it solved their problems.
- Do an A/B experiment—randomly provide the media to some customers and not to others and measure the differences in perception or action.

Admittedly, these are general approaches, and it is difficult to be definitive in the abstract. The key point here is that you should look to each of your business goals and try to determine how you might definitively say whether or not (and to what extent) the business goal has been met.

STEP 5: MANAGE FOR MASSIVENESS – A CASE STUDY

This "step" isn't a step in the sense of the sequence of preceding steps, but rather an example illustrating how all the steps described in this article flow in a project, and how we have used this process to guide very large projects.

During the last few years at Resources Online, we have developed a media-rich computer-based counseling tool for HIV/STD risk reduction and generalized health screening and counseling. We call this the CARE platform. For the various versions of CARE (multiple language versions for use in the United States and internationally), we create and manage thousands of images, audio assets, and videos in multiple personas and languages. This project has helped us refine our processes over the years to meet the business requirements of this product (which we distribute free of licensing fees for government and non-profits). We describe it here to illustrate how the business requirements we derived were translated into processes and, ultimately, success measures.

The CARE product is typically used in a clinical setting by individuals seeking sexually transmitted disease (STD) testing, or by individuals who are HIV-positive and need support to avoid secondary risks and to comply with medication regimens. The product can assess a patient's state of knowledge, behaviors, and risks and provide meaningful, appropriate information to augment clinical care—or provide this interaction when it is otherwise not available. Every interaction in the protocol is spoken (making it accessible to lower-literacy patients), often by up to four different personas (the patient chooses an avatar). The product also includes more than 30 skills-building videos that cover a variety of issues related to risk reduction.

Table 1 describes the high-level requirements and success measures for CARE media:

Requirements	Success Measures
Scale for massiveness: The overriding requirement was to scale our efforts for massiveness: We needed to produce over 30 videos - more than 30 stories-along with over 5000 audio clips.	**Success measure:** All our efforts had to scale to this effort, so the measure of success was also broad: Finish the project on time and on budget -or at least reasonably near budget.
Organize production efficiently: Stories had to be complete and ready to shoot all at the same time to minimize production time. "Ready" included usability with low-fidelity versions of the stories to get feedback from our intended audience.	**Success measure:** Ultimately, our budget for this requirement measured our success, but intermediate success measures included minimizing the required production hours (i.e. working efficiently with the cast and crew and minimizing the need for multiple days and retakes).
Consistent project taxonomy: All images, video and audio clips, and other elements had to adhere to a naming scheme that we devised before we shot a single frame or recorded audio.	**Success measure:** Our success was measured by a negative - the absence of confusion, version control problems, and time spent locating arbitrarily named media.
Real-time status: We ensured that elements were tracked from preproduction through production and post production - a full-time job for a dedicated staff member.	**Success measure:** Our success was measured, again, by lack of confusion, rework, and lost media - or in other words, efficiency.
Simple tools for the entire team: We needed simple, portable tools to assist us. We ended up relying heavily on Microsoft Office Excel to track the status of all media components and to create working scripts for voiceovers.	**Success measure:** We measured success by making sure that the entire team - including our medical consultants, talent, and production staff - could use the same familiar tools to work with the content. Our MD and PhD consultants, in particular, did not have time to learn new production tools, so we worked to provide content in forms that they could use.
Ease of production: The first videos we created for these products were live action with actors portraying scenarios. This approach was expensive and not terribly scalable - changing a script meant a reshoot, and localization meant creating multiple productions. Over time, we developed a production model that was more appropriate to our scale: For each story, we shot hundreds of static digital photographs and then animated them in video. This meant that we could choose models (not actors) who were demographically appropriate for our story, and then have separate voice actors voice the audio. By separating audio and video, the producer could change scripts any time, and the videos were easy to localize. For example, the producer could rewrite an entire paragraph from the middle of a scene, and all the video editor had to do was rerecord the audio for the section and take out a few still images - far less expensive than bringing an entire cast and crew back to a location. The approach also made localization vastly easier - we just add a translated sound track, which can also be made culturally appropriate without having to remake our video.	**Success measure:** Reuse of source media for multiple languages and revised scripts.

Requirements	Success Measures
Ease of management: Our process was to divide content into small segments to provide flexibility. The tradeoff for this granularity is complexity; because an audio clip could consist of anything from a single word to, at most, a few sentences, we had to manage the complexity of thousands of audio clips and then assemble them into our product builds without fail. A consistent naming scheme for the media helped us keep track of it and identify missing segments.	**Success measure:** Lack of confusion, minimized need for unnecessary work and multiple redundant recording and production sessions. Clean media builds - and any missing media components - were easily discovered and fixed.
Ease of localization: Because our audio snippets were so granular, we could record efficiently in other languages using our Excel spreadsheet.	**Success measure:** Like other requirements, efficiency and minimized rework are indications of success.

TABLE 1 *High-level requirements and success measures for CARE media*

When we began this project, it was clear that a traditional approach to video production would not address our business requirements. So we didn't begin with all our best practices completely formulated, but we did foresee many needs (such as project taxonomy and need for scale), and we adjusted and adapted others (such as our video production process). We ended up with a process that addressed our business requirements, and it's a process that we use today.

The most difficult aspect of dramatic film production is capturing a performance, an event created by an actor that occurs linearly, over time. We solved this problem in a way that addressed our needs for granularity and flexibility, and that made it unnecessary to worry about a sustained performance. The images that conveyed the right feeling could be carefully chosen during editing. The audio of the characters' dialog could be recorded later in a studio. An entire video could be created during post-production by choosing audio clips and stills and editing them together with the right pacing. Editors like to have a number of choices to work with, but with video, they may have to settle for pieces from two or three good takes. With hundreds of stills to work with, the editor could create any number of scenes.

The approach solved the problem of expensive actors, and allowed us to use amateur actors and HIV-positive individuals who were not really actors at all. We used many real locations, and simple lighting or just available light, so expensive crews were not required. And we did not have to worry about recording sound on location.

Above all, videos worked in this situation because telling a story in a compelling way was the highest-level requirement. Our success measure for this requirement has been the high level of user acceptance that the videos achieved in our product.

Summary and Conclusion

Managing a media project to meet requirements takes a disciplined approach that continually returns to the question of how well production choices address business goals, and ultimately whether the stories we create are of value to the business. We have focused primarily on the practical aspects of media production guided by the need to tell a story; a much bigger subject that we merely touched upon is how to create those stories. This topic is largely beyond our current scope—where creative minds craft the story. However, the creative process must take into account much of what we do discuss in this article, because the creative work of storytelling must also satisfy business goals to be successful. The goals we seek depend on effective storytelling, production values, and the ability to create a compelling experience that the audience will relate to and find credible. These sorts of requirements will always be a part of creating effective media. Managing the production to meet business requirements is how we effectively get the story from concept to our audience, and how we make media content address business goals.

Adopting a business requirements approach is *essential* when the scale of media production is massive. We argue that there is no other way to understand, plan, execute, and evaluate a massive project without a "northstar" set of business requirements that you establish at the outset. Or, to put it more succinctly, without business requirements, a massive media project risks producing chaos, waste, and uncertain value to the business on a massive scale. Of course, this approach is applicable to smaller media projects as well, but the scale of cost, investment, and the consequences of error in a massive project are truly daunting, and differentiate large projects from small. If you are running massive projects, you simply have to get it right; accounting for business requirements in the media production process is the way to accomplish that.

About the TIMAF Library

This 'Information Management Best Practices' book is a publication in the TIMAF Library. The publications in the TIMAF Library are aimed at promoting Information Management and are published on behalf of TIMAF. TIMAF, the Information Management Foundation, is an initiative of information management practitioners to provide a strong and clear foundation of information management.

TIMAF encourages authors from around the world, who are experts in their particular information management sub discipline, to contribute to the development of the TIMAF publications. Are you interested in sharing your ideas and experiences online with the TIMAF Community? Visit www.timaf.org and join the discourse. Have you experienced the merits of a specific approach to information management strategies, methodologies, technologies or tools? Submit a proposal according to the requirements listed in the 'Call for Best Practices' at www.timaf.org.

The following publications are available in the TIMAF Library:

Introduction books

Information Management Framework
paper edition - release: September 2011

Best Practices books

Information Management Best Practices 2009 Sneak Preview
online edition - www.timaf.org

Information Management Best Practices – Volume 1
paper edition - ISBN 978-94-90164-03-4

Pocket Guides

Information Management Framework – A Pocket Guide
paper edition - release: November 2011

Social Networks

Information Management Framework Wiki
www.timaf.org/wiki

We will publish new books and other instruments on a regular basis. For further enquiries about the Information Management Library, please visit www.timaf.org or send an email to info@timaf.org.

Introduction

INFORMATION? MANAGE!

Information is the term we use to stand for all forms of preserved communication that organizations care to produce, store and distribute. If we communicate it and record it, it is information. So, for us, information is anything from sales figures in a database to a video on philosophy viewed on a mobile phone.

We define information management as the organized collection, storage and use of information for the benefit of an enterprise.

Our definitions are intentionally wide enough to cover content, document, asset, data, records and all other 'information managements' that organizations do. We believe that while each of these "sub-disciplines" has its own tools and types of information, there is much more that unites them than divides them. Our definitions are intentionally quite practical. For us, information management simply means moving pieces of recorded communication from creation to consumption to retirement. Our definitions are crafted to carve out a niche for the information manager. Information managers make sure that recorded communication can be amassed and distributed in a way that benefits their organization. Finally our definitions are crafted to be a simple guiding principle. Any person working in any information project can use this definition to remain focused on the ultimate aim of their particular kind of work.

INFORMATION MANAGEMENT? TIMAF!

The field of information management is currently fractured and incoherent. Each sub discipline (content, document, asset, data, records management to name just a few) has its own practitioners, applications and professional communities. We believe that behind the seeming differences between these 'managements' there is a deeper unity that will eventually define a strong and clear foundation for all of them.

We do not believe that all managements will or should merge, but rather that just as business underlies a variety of business practices including accounting and finance, there is a common foundation for the various forms of information management.

The Information Management Foundation (TIMAF) tries to provide this foundation by publishing these information management best practices. In addition, TIMAF develops and maintains an information management framework that brings the commonalities between sub disciplines to light and helps to organize the best practices that we publish.

BEST START? BEST PRACTICE!

Just as business is practiced within a more specific context, information management is also practiced in context. Thus, we believe that the best way to illustrate the concepts and practices of information management is within the context of one or more sub disciplines. So, this best practices book tries to show global principles of information management in the context of projects in one or more of the sub disciplines.

This is the first volume of 'Information Management Best Practices.' In future publications we will provide an ongoing compilation of high quality best practice guidance, written for and by experts in the Information Management field from around the world. These best practices are designed to help professionals overcome their information management challenges. They bring complex models down to earth, with practical guidance on tough problems.

In this volume, practitioners describe nineteen projects that you can learn from, In return, we ask that you let us learn from you! Please let us know what your experiences are with these or other projects at **www.timaf.org.**

Colophon

Title
TIMAF Information Management Best Practices – Volume 1

Editors
Bob Boiko – USA - Erik M. Hartman – NL

Copy-editors
Jonah Bull – USA – Jenny Collins – USA - Elishema Fishman – USA

Publisher
Erik Hartman Communicatie – NL

Edition
Volume 1 – 1st impression – November 2010

ISBN
978-94-90164-03-4

Design & Layout
Nevel Karaali – NL

Print
Wöhrmann Print Service – NL

Please contact the editors for ideas, suggestions and improvements at info@timaf.org.

TIMAF

The Information Management Foundation

BEST PRACTICES

'TIMAF Information Management Best Practices – Volume 1' is a compilation of high quality best practice guidance, written for and by information management experts from around the world. It is packed full of useful knowledge, views, and guidelines that will help professionals overcome the information management challenges of their organizations. It brings complex models down to earth, with practical, step-by-step guidance on the most important problems.

6 reasons why you should read this book:

- **Covers the whole spectrum of information management including data management, business intelligence, knowledge management, records management, document management, asset management, and both web and enterprise content management.**
- **Provides best practices from acknowledged experts with case studies from global companies, governments and non profit organizations worldwide.**
- **Presents clear, compelling problems and step-by-step solutions.**
- **Outlines the skills you need to accomplish each best practice.**
- **Learn from Motorola, Hewlett-Packard, Microsoft, KPN, Wienerberger, World Bank, Essex County Council, Harvard Business School, Canadian Department of National Defence, University of Washington, and other organizations.**
- **Must read for managers and practitioners in information management.**

"The TIMAF organization proves its dedication to raising the bar for information management practitioners everywhere. It has assembled the best thought leaders in the field to share insights from case studies which are both actionable and universally relevant. Even the most experienced IM professionals will learn something new with each turn of the page." **SCOTT LIEWEHR, President CM Professionals**

"It is, quite frankly, the best collection of case studies and solutions I've run across and will be an invaluable resource for our readers. The reports are solid, practical and real-world examples of how to do things right."
HUGH MCKELLAR, Editor in Chief KM World Magazine

'TIMAF Information Management Best Practices – Volume 1' is sponsored by:

SDL Xopus | Getronics Consulting a KPN company | ERIK HARTMAN COMMUNICATIE

J. Boye | CMS WiRE | CM Pros CONTENT MANAGEMENT PROFESSIONALS

ISBN 978-94-90164-03-4

9 789490 164034 >

www.timaf.org