

The New Role for Documentation in the Era of Customer Experience Management

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Executive Summary

Virtually overnight, consumers empowered by mobile devices, social platforms, and ubiquitous connectivity have forced organizations of all types and descriptions to come to terms with customer experience management (CEM). Customer experiences are usually multi-event and multichannel, and they typically involve multiple departments or teams. Successful CEM, therefore, requires organizations to abandon the traditional “touchpoint” approach to managing and measuring customer interactions and satisfaction.

The shift to customer experience management has profound implications for technical writers and other documentation professionals. First, documentation content breaks out of “post-sale jail” and may now be deployed at any point in the engagement cycle. Second, this means that technical authors should now be members of broad, cross-functional teams responsible for the comprehensive experiences. Third, and most important, given the complexity of multi-event, multichannel experiences for numerous customer segments and campaigns, the structure and precision typical of documentation production must be extended to the customer experience management as a whole.

The CEM Imperative

All That Is Solid Melts into Air. The title of Marshall Berman’s magisterial 1982 study of the rise of industrialized societies in the 19th century is even more appropriate for our own time.¹ In the few years since the introduction of the smartphone in 2007, mobile computing and social platforms have inverted the balance of power between buyers and brands, and fundamentally transformed the source of business value and competitive advantage.²

Established, “solid” sources of differentiation — such as product capabilities, supply chain efficiencies, and vertical integration and scale — melt away when consumers carry super computers in their pockets and have virtually unlimited access to information. (The CPU in the iPhone 6 has 625 times more transistors than a 1995 Pentium chip.³) Awash in the flow of digitized communications and social exchanges, physical characteristics remain important but only when they are incorporated into comprehensive, customer-centric experiences.

This is the lesson of the Apple Store, for example. Apple pays for premium, high-traffic locations, hires knowledge staff, and offers hands-on training. But what makes the Apple Store a retail phenomenon is

how the so-called “triple convergence” of these factors creates an immersive experience for buyers that nurtures brand identification and lifetime customer value.⁴

In today’s age of the empowered consumer, companies of all types — B2C or B2B, private or public, large or small — increasingly find that compelling, positive customer experiences are the only sustainable source of competitive advantage. However, transforming the organization to sustain the production and delivery of great customer experiences is an immense challenge. Customer experience management (CEM) requires the contribution of practically every department and business process.

Documentation professionals, the content they produce, and the workflows for producing it all play an especially important role in the successful transition to CEM for two reasons. These can be analyzed as, first, how CEM will *affect* the ways in which documentation content is deployed and, second, how the structured processes typical of documentation production will help *effect* and support increasingly complex omnichannel CEM.⁵

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Technical Documentation Breaks Out of the “Post-Sale Jail”

In the traditional view of the customer lifecycle, documentation content is deployed almost exclusively after the sale (or other conversion), in the form of assembly instructions, user manuals, service documentation, and the like. (See Figure 1.) This restriction to the “post-sale jail” is no longer valid; technical documentation is increasingly used at multiple stages in the lifecycle, most often in response to evolving customer expectations and habits of consumption. (See Figure 2.)

For example, a consumer considering the purchase of a home appliance such as a washing machine may want to compare how difficult each manufacturer’s product is to transport, install, or operate. In response to this scenario, The Home Depot was one of the first retailers to offer a smartphone app that allows

shoppers to scan QR codes on packaging or display shelves and receive detailed product information, how-to videos, and user reviews.⁶

More broadly, research shows that consumers have quickly adapted to today’s information-rich environment. In B2B technology sales, buyers spend a much greater part of the decision journey consuming technical and product information (55 percent) than they do talking to salespeople (21 percent). According to one study, up to 70 percent of the B2B buying decision is made based on information the buyer accesses before speaking with the sellers’ representatives.⁷

The role of technical documentation has also been transformed in the post-purchase stages of the

Figure 1.

Traditionally, documentation serves post-sale support

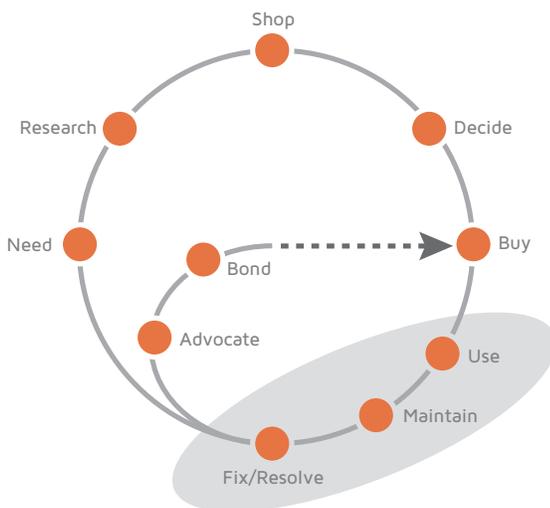
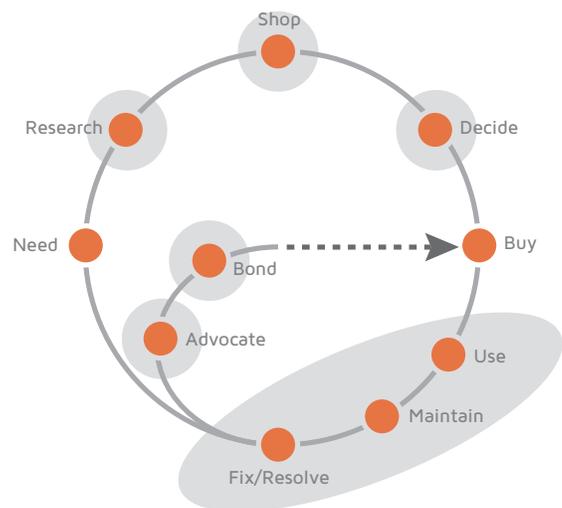


Figure 2.

Today, documentation is valuable throughout the customer lifecycle





customer lifecycle. Companies have long known that retaining an existing customer is up to seven times less expensive than acquiring a new one.⁸ Today, given the spread and the popularity of social platforms and user reviews, the value of a happy customer is vastly multiplied. The right kind of post-sale documentation and issue resolution — proactively delivered to social channels, or perhaps personalized and delivered on the customer’s device of choice — can help ensure that they become not just repeat buyers but also social advocates and influencers.

Transforming documentation content for customer experience management

The division between “persuasive” marketing copy and “educational” documentation content was never entirely correct. Good documentation is not only accurate; it also engages the reader (or viewer) with a tone, rhythm, and level of detail that is appropriate to the audience (engineers versus homeowners) and context (a “quick start” diagram versus a complete user manual). Nevertheless, the need for customer experience management does bring changes to established documentation practices. As technical content is deployed throughout the customer experience lifecycle, document teams must get ready to:

- **Deliver content in different formats.** “The PDF will soon be put on the shelf with the horse-buggy whip and the manual typewriter,” according to one documentation writer.⁹

That’s too extreme; PDFs will undoubtedly play an important role for many years. However, it is true that documentation now needs to be delivered in many different formats, including video, GIFs, interactive animations, and other forms of rich media. For example, Mercedes Benz now offers online interactive owners manuals combining videos, high-resolution photos, and interactive elements. Much of this material is redeployed in a tablet app for consumers in the decision-making process, as well as in an “Advantages App” used by sales staff to access product information and demonstrations.¹⁰

- **Respond to the mobile shift.** The Mercedes apps reflect consumers’ increasing preference for mobile channels and devices.¹¹ Documentation delivery can no longer rely on paper and linked PDFs on a website. Companies should plan to use responsive or adaptive design practices to ensure optimal delivery of content to smaller screens and to take advantage of the capabilities of a given mobile device.¹² Deutsche Telekom, for example, has successfully reduced consumer anxiety (and service center calls) with an app for installing a home Wi-Fi router that replaces its complex printed manual.¹³ Users can scan a QR code that loads their ISP access data into the app and then walk through five simple, illustrated steps as the app communicates with the router.

“ Documentation professionals, the content they produce, and the processes for producing it all play an especially important role in customer experience management. ”

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- **Move from monologues to conversations.** Social platforms such as Facebook, LinkedIn, and Twitter have recently become extremely important channels for customer service and support. Users with service issues or complaints increasingly turn first to a social medium — and they expect companies to be listening and responsive. Of course, detailed technical support can hardly be provided within Twitter’s 140-character limit — but the issue can be acknowledged immediately and dealt with appropriately. More importantly, the two-way, conversational character of social platforms offers numerous advantages. For example, companies can create (or nurture existing) user forums where customers support each other. And by monitoring social exchanges, companies can gain invaluable insights into ways to improve or enhance existing documentation content.¹⁴
 - **Accommodate different ways of consuming content.** Forward-thinking document professionals are used to creating “components” — discrete blocks of content that facilitate reuse and recombination. Today, this production-centric practice also needs to consider the customer perspective. As the examples above illustrate, consumers want to

be able to consume documentation content in bite-sized pieces at the time and on the device of their choice. Teams need to consider where and why users might choose to create their own “section breaks” in a large piece of documentation — and then make it easy for users to find their place and pick up the flow of the work. (Mobile apps provide an excellent feedback loop to study consumers’ interaction and content consumption habits.) Similarly, because documentation is predominantly about the product and product features, it is a known “SEO godsend.”¹⁵ As technical content appears more frequently in early stages of the buyer’s decision journey, documentation teams should work closely with marketing to ensure that keywords are prominently used and linked. The aim is not only to promote the company and products in search returns, but also to anticipate, respond to, and help shape the incipient desires of consumers during these early phases.

To be clear, these are not simply lessons that documentation professionals need to learn from their marketing colleagues. On the contrary, marketing, documentation, and the organization as a whole need to adapt to the new and rapidly changing requirements for CEM.

The Daunting Challenge of Omnichannel CEM

To date, the response to digitally empowered consumers has most often taken the form of digitally supercharged marketing efforts. With the right mix of new technologies, skills, and processes, marketers have a chance to (just barely) keep up with the new consumer demands. This marketing-centric approach makes sense in the early phases of CEM; marketers, who have traditionally “owned” the customer relationship, are clearly on the front lines of the battle. However, since customer experience encompasses “the totality of a customer’s interactions with a company or brand,” it cannot be consistently managed and delivered by marketing alone.¹⁶ Indeed, the evolution of consumer expectations has already demonstrated the need for a broader organizational effort.

PwC has predicted that “by 2020 . . . the need for a unified consumer omnichannel experience will be complicated by the need for nearly perfect execution.”¹⁷ Nearly *perfect execution of seamless omnichannel experiences*: this is an immensely daunting task, and PwC has, in all likelihood, overestimated the time that companies have to build and optimize this capability.

Content is the essence of most customer experiences. This is obvious in the case of the web, email, and mobile devices. Increasingly, in-store interactions are also informed by digital media, in the form of aisle end-cap displays, beacons, and clerks armed with tablet computers. Call center exchanges, packaging, and printed material including documentation all

depend upon digital content repositories and processes. Because of the indispensable role of content items — or what we might now call *experience assets* — a content management system (CMS) and associated practices will remain at the core of the ecosystem of software applications supporting customer experience management for the foreseeable future.

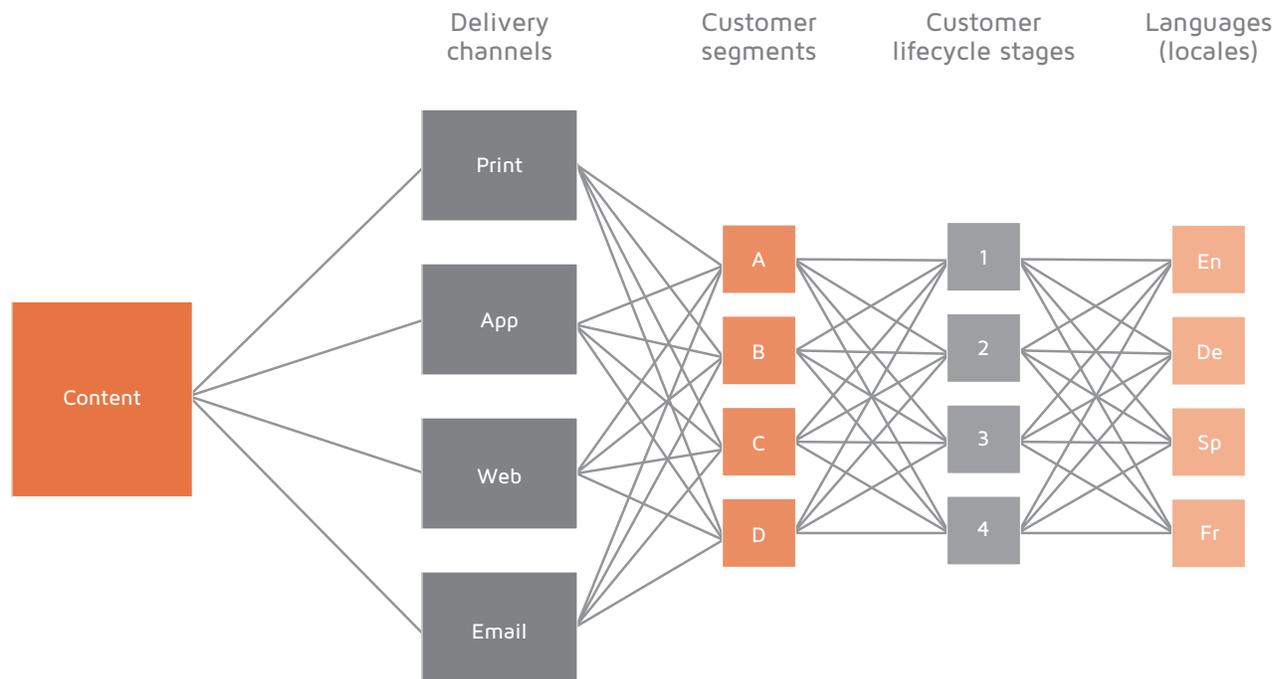
However, consider the complexity of content management for omnichannel customer experience. A single content item might be combined with other elements to produce digital experiences that are published on any (or all) of four channels. This is further compounded by specific needs of four customer segments and four different stages in the customer decision journey. Finally, the experiences may be translated for use in different locales. (See Figure 3.)

The point of this example is not that every piece of content will be subject to every possible permutation. (In fact, that would be a relatively straightforward, if tedious, matter of producing all of the necessary renditions.) Rather, the challenge is to ensure that content assets, whether they originate in marketing, documentation, or other departmental workflows, can be combined to produce an experience that is relevant and engaging for a given customer or segment, in a given channel or device, at a specific stage in the customer lifecycle, and in the appropriate language.

“ The marketing-centric approach made sense in the early phases of CEM. But the evolution of consumer expectations has already exposed the need for a broader organizational transformation. ”

Figure 3.

The content challenge of omnichannel CEM



From the perspective of producing the assets that make up customer experiences, omnichannel CEM requires content that can be:

- **Created, stored, and accessed as discrete assets.** To maximize reuse, assets should be as discrete and modular as possible. Deane Barker of Blend Interactive has coined the term *minimum reasonable units* (MRUs).¹⁸ A product description, for example, should be separated not only into name, image, description, and specifications, but also into shorter (or smaller) versions of each of these for small screens, text-only devices, etc. (This

allows you to avoid the mistake of Amazon.com, which, as Karen McGrane has pointed out, tries to publish all of the content of the web page onto a mobile device, to the great detriment of the user experience.¹⁹)

- **Combined and recombined as needed.** Like Lego blocks, content assets should be easily combinable to create a given customer experience as well as appropriate versions of that experience. This requires that the assets are free of any delivery-specific markup and equally that they planned and created with an understanding of the various ways the



modules might be connected. Not long ago, organizations argued the need for a “web first” approach to content production. More recently, the talk had been about the benefits of “mobile first.” Rapidly maturing omnichannel CEM requires a rigorous and well-structured *content first* capability.²⁰

- **Made intelligent.** Taxonomies and metadata are the great lie of traditional web content management. Content creators, web teams, and entire organizations have stressed the importance of properly tagging content, but it has very rarely been put into practice. Compared to the loose talk but lax practice of content tagging in the past, CEM is the day of reckoning. Consistently producing and delivering personalized, multichannel customer experience will be simply impossible if each asset (and each aggregation of assets) is not thoroughly and accurately tagged according to well-developed, constantly monitored, and highly intelligent taxonomies. Combined with

new governance practices, process management, and analytics, such tagging practices will make it possible, in principle, for each experience asset to know what it is, how it can be combined, what it has been combined with in the past, where it was presented, to what segment, in what context, and to what effect.

Consider this example from a larger retailer DCG advised. With over \$1 billion in annual advertising and marketing spend, the company reuses *less than 2 percent* of all marketing content (and only about 10 percent of expensive digital assets). That astonishing statistic is, first of all, testimony to how frantically companies are working to keep pace with consumer expectations. It’s also a clear indication that the established practices are inadequate for the increasingly complex demands of CEM. Wasting money, time, resources, and skills is obviously unsustainable. Fortunately, it is also unnecessary, if the experience assets are modular, combinatory, and intelligent.

“ Organizations adopted the ‘web first,’ approach to content production, and now argue the benefits of ‘mobile first.’ Omnichannel CEM requires a rigorous and well-structured *content first* capability. ”

Documentation Practices Will Help Make Omnichannel CEM a Reality

With the advent of customer experience management, the message has been that documentation professionals must adapt their content for new uses in the customer lifecycle. What is less often remarked is how documentation practices will provide the foundation for consistent, organization-wide CEM.

From one perspective, technical writers and documentation teams occupy an intermediate space in most organizations. Situated between the developers or engineers and the marketers — between the makers and the shakers, so to speak — technical writers are not fully situated in either realm. And yet it is precisely this edge existence, their unique combination of coding and communication that makes documentation professionals and their established practices the indispensable foundation for maturing CEM. Although the aim of CEM is variously described as that of engaging, enchanting, and delighting customers, it will not be possible to achieve any of this consistently and at scale without the rigor, structure, and precision that documentation teams have developed for producing and managing content.

Is DITA the answer?

DITA (Darwin Information Typing Architecture) is the most well-known and widely established of the XML-based componentized authoring models. Although this report is not the place for a thorough evaluation of DITA, it is clear that it addresses many

of the needs outlined above, including modular, topic-based authoring, single-source reuse, output format neutrality (up to a point), and very strong metadata and semantic markup features, among others. Although it is largely used in the production of help and other technical documentation, there is no inherent reason that DITA cannot be extended to other types of content. In fact, as the content strategist Rahel Anne Bailie has demonstrated, DITA is very well suited to some complex CEM scenarios involving, for example, “multiple products, multiple product lines, multiple languages, multiple locales per language, [and] multiple audiences per product line, and locale and language.”²¹

Admittedly, the markup language in which DITA content is composed will be anathema to most marketers. And yet, in the last few years, marketing teams have adapted to and learned to use sometimes rather complex software applications in order to support customer experience management. Just as a new role and skill set for “marketing technologists” have evolved at the interface of marketing and technology, so we may anticipate a similar mediation between the rigor of documentation and the creative aspects of marketing and customer engagement.

In short, DITA is currently not flexible and agile enough for the fast pace of CEM. Yet it can serve as a solid foundation, and there is neither the need, nor the time, to seek another.

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Conclusion: Getting Started

Delivering the necessary consistency across the multiple interactions that make up customer experiences demands that organizations fundamentally rethink and restructure how they plan, create, manage, and present content assets and aggregated experiences in response to customer expectations. Because these expectations are changing rapidly and even unpredictably, the problem cannot be precisely defined; the response must be flexible and adaptable.

It is clear, however, that the old divisions, departmental borders, and silos of technology, processes, and incentives do not correspond to the customer-centric universe. Today, the consumer determines when a particular kind of content — communication, offer, documentation, etc. — is desired and appropriate. The organization must be ready and able to sense, understand, and respond to that desire — not once but constantly, and across multiple segments, channels, devices, languages, and stages of the customer lifecycle.

Consistent omnichannel CEM does not and cannot emerge fully formed from the head of Zeus (or of the Chief Digital Officer). Organizations aiming to build a cross-functional content capability should begin with a specific challenge and complete the following steps:

- **Identify a high-value customer journey.** Customer experience encompasses the totality of a customer's interactions with a company — but that doesn't mean you can or should try to map out and serve every one of them, from cradle to grave. Rather, as McKinsey has pointed out, in most businesses, a limited number of self-contained customer journeys accounts for the majority of the opportunities

to increase customer satisfaction and to drive revenue.²² These journeys are often multitouch and multichannel, so they involve numerous teams or departments. For example, the process for acquiring and on-boarding a new cable customer will likely involve the website, the call center, and a field technician, as well as different kinds of content, from marketing copy to legal terms and conditions to documentation. Start by picking just one such clearly defined cross-functional journey.

- **Designate a cross-functional team.** With an understanding of what business functions are involved in supporting the journey — and, especially, what types of content — create a cross-functional team that is specifically dedicated to understanding and optimizing this journey from the customer's perspective. At minimum, this team must include staff responsible for documentation and marketing content, as well as customer engagement strategists. If possible, have the team work together, away from their normal colleagues.
- **Analyze the content requirements.** Inventory and audit how the customer consumes — and wants to consume — content at every step in the journey. Note that this may differ for various customer segments, or even according to the social customs of different locales. Also, content requirements encompass all channels, including email, social (such as blog posts), and mobile apps.
- **Determine how content production can be rationalized and structured.** This is a two-part effort. First, some organizations choose to



create a content center of excellence (CCoE) that determines high-level brand messaging and manages the production process to ensure content reuse and avoid redundant production.²³ Second, documentation professionals should look for ways that DITA or other structured approaches already contributing to the journey can be extended to other aspects.

- **Measure results with multiple criteria.** Success is not simply a matter of greater

revenue and/or increased customer satisfaction. Time-to-market, content reuse, service call reductions, etc., can be as important as revenue gains or customer metrics such as Net Promoter scores.

At the same time, a separate work group comprising marketing and documentation members should investigate how DITA or other componentized approaches to content production can be adopted, modified, and optimized to serve the needs of the company's overall CEM strategy.



Endnotes

1. *All That Is Solid Melts Into Air: The Experience of Modernity* was first published by Simon and Schuster in 1982. The title is taken from a line in *The Communist Manifesto* (1848) in which Karl Marx characterizes the loss of traditional sources of identity and meaning under the disruptive forces of modernity and industrialization.
2. See Digital Clarity Group's Insight Paper, "The CEM Imperative: Customer Experience In the Age of the Empowered Consumer." It can be downloaded at <http://www.digitalclaritygroup.com/the-cem-imperative-customer-experience-in-the-age-of-the-empowered-consumer/>.
3. This statistic is from a presentation by Benedict Evans of Andreesen Horowitz. See <http://ben-evans.com/benedictevans/2014/10/28/presentation-mobile-is-eating-the-world>.
4. For an analysis of the "magic" of the Apple retail stores, see <http://www.forbes.com/sites/matthewcarroll/2012/06/26/how-retailers-can-replicate-the-magic-of-the-apple-store-online/>.
5. The recent emergence of the term "omnichannel" is controversial, with some arguing that it is an unnecessary substitute for cross-channel. DCG believes that the difference is meaningful. Namely: Cross-channel is about how a company can organize its tools, skills, and resources to support (hopefully consistent) customer experiences across multiple channels and touchpoints. It is an "inside-out" perspective. Omnichannel is the same dynamic, viewed "outside-in" from the perspective of the consumer.
6. The Home Depot introduced the scanning app in 2011. Newer versions have voice commands, real-time product inventory, and an augmented reality feature that displays products in the home environment: http://www.homedepot.com/c/SF_Mobile_Shopping.
7. These statistics are cited in the May 2013 edition of *Intercom: The Magazine of the Society For Technical Communication*, page 34. It is available at: http://lavacon.org/lavacon_sched_intercom_cs_issue.pdf.
8. This often-cited statistic is cited from the following infographic, where it is attributed to the White House Office of Consumer Affairs: <http://www.helpscout.net/75-customer-service-facts-quotes-statistics/>.
9. See note seven.

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10. For more information about the Mercedes Benz presales app, see <http://www.digitalannexe.com/?portfolio=c-class-2>. The Advantage App is discussed at <http://media.daimler.com/dcmmedia/0-921-658781-1-1490243-1-0-0-0-0-0-439-0-0-0-0-0-0.html>.
 11. See Digital Clarity Group's Insight Paper "Understanding the Mobile Shift," available at <http://www.digitalclaritygroup.com/understanding-the-mobile-shift-obsession-with-the-mobile-channel-obscures-the-shift-to-ubiquitous-computing/>.
 12. For a discussion of the differences between responsive and adaptive design (and an argument for while the latter is superior), see <http://www.hebsdigital.com/blog/the-industry-has-spoken-adaptive-web-design-is-the-winning-strategy/>.
 13. The Deutsche Telekom router app is discussed (in German) at <http://www.telekom.com/innovation/archiv/191234>.
 14. For a discussion of using social media to supplement or enhance customer support, see: <http://www.tsanet.org/blog/2012/10/22/5-innovative-ways-leverage-social-media-technical-support>.
 15. See "5 Reasons Your Product Documentation Is a Marketing Asset," at <http://mashable.com/2011/08/12/product-documentation-marketing/>.
 16. For DCG's full definition of customer experience management, see the Insight Paper, "Addressing the Midmarket's Requirements for Customer Experience Management," available at <http://www.digitalclaritygroup.com/addressing-the-midmarkets-requirements-for-customer-experience-management/>.
 17. See PwC's report, "Retailing 2020: Winning in a Polarized World": http://www.pwc.se/sv_SE/se/detaljhandel/assets/retailing-2020-winning-in-a-polarized-world.pdf.
 18. Deane Barker's extensive and thorough presentation on COPE is available at <http://www.slideshare.net/nowwhatconference/copeing-mechanisms-the-peril-and-promise-of-create-once-publish-everywhere>.
 19. Karen McGrane's website combines her presentation on COPE with a complete transcript of her insightful and entertaining discussion. See: <http://karenmcgrane.com/2012/09/04/adapting-ourselves-to-adaptive-content-video-slides-and-transcript-oh-my/>.

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20. Ibid.
 21. See “*DITA: Not Just for Technical Content*,” available at: <http://intentionaldesign.ca/2013/07/15/dita-not-just-for-technical-content/>.
 22. See “The Truth About Customer Experience” in the Harvard Business Review, September 2013: <https://hbr.org/2013/09/the-truth-about-customer-experience>.
 23. For a detailed discussion of the benefits of creating a content center of excellence (CCoE), see “*Managing Content Marketing: The Real World Guide for Creating Passionate Subscribers to Your Brand*” by Robert Rose and Joe Pulizzi, published by the Content Marketing Institute in 2011. See: <http://managingcontentmarketing.com/>.



About DCG

Digital Clarity Group

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies. For more information about DCG, visit www.digitalclaritygroup.com or email info@digitalclaritygroup.com.

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