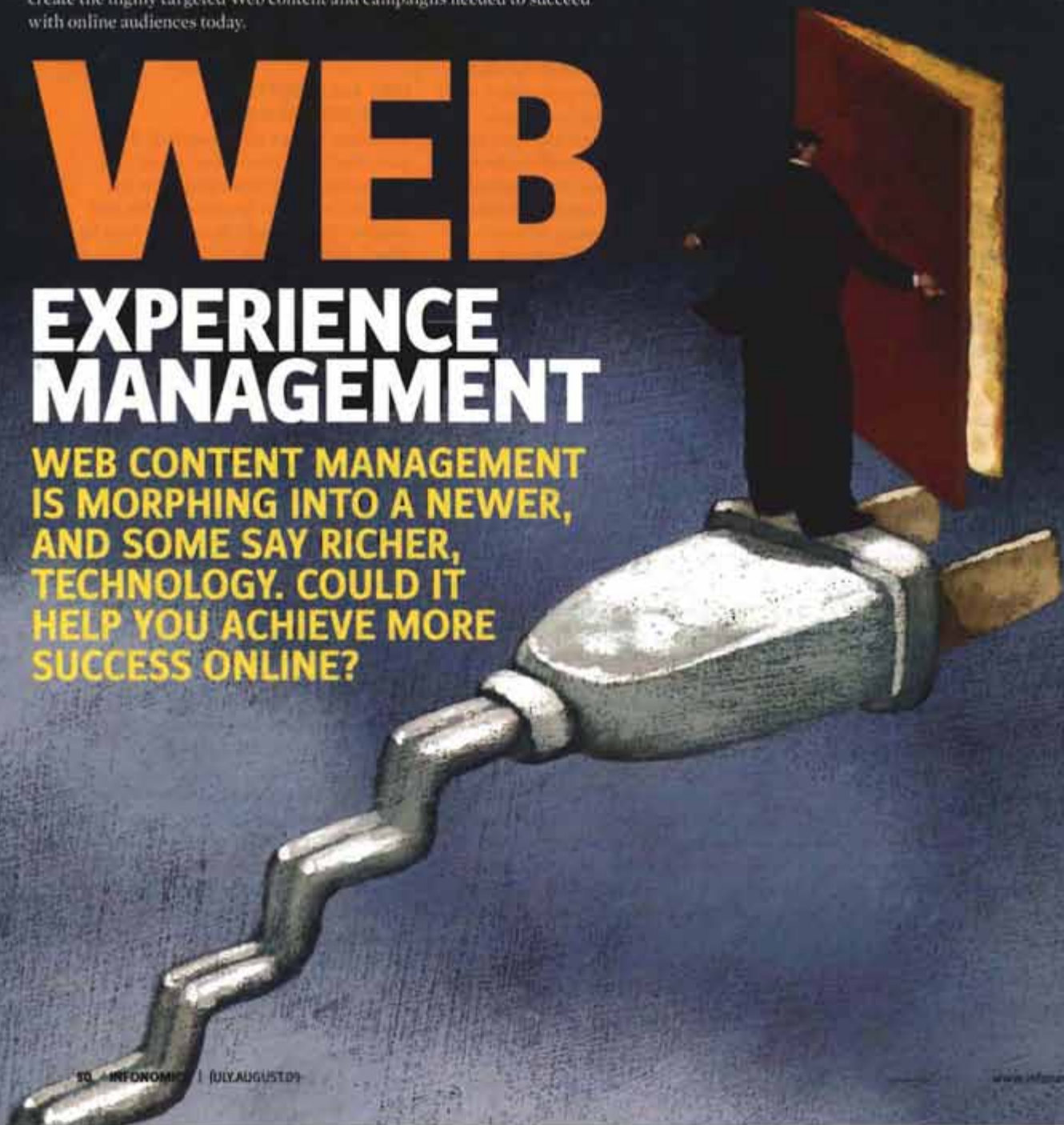


**I**N TODAY'S CHALLENGING BUSINESS CLIMATE, ORGANIZATIONS MUST accomplish more online than ever. Consumers now increasingly expect rich, highly-relevant content as well as immersive community features from the websites they visit, even as meeting key business goals such as controlling costs and driving revenue has become more essential than ever. Accordingly, business must meet new demands for increased scale, scope, and speed online. Updates, for instance, can no longer wait in a queue for days before appearing on a website, and marketers and other business users must be empowered to manage content directly in order to create the highly targeted Web content and campaigns needed to succeed with online audiences today.

# WEB EXPERIENCE MANAGEMENT

**WEB CONTENT MANAGEMENT IS MORPHING INTO A NEWER, AND SOME SAY RICHER, TECHNOLOGY. COULD IT HELP YOU ACHIEVE MORE SUCCESS ONLINE?**



of Records Managers and Archivists (ARMA) and the international standard on records management define the word "document". ARMA defines a document as "(1) recorded information regardless of medium or characteristics. Frequently used interchangeably with the word *record* or (2) a single record item (letter, memorandum, form, or report) consisting of one or more pages." ARMA defines a record as "recorded information, regardless of medium or characteristics, made or received by organizations that is evidence of its operations, and has value requiring its retention for a specific period of time."

ISO 15489 defines a document as "recorded information or object which can be treated as a unit". It defines a record as "Information created, received, and maintained as evidence and information by an organization or person, in pursuance of legal obligations or in the transaction of business."

From the definitions described above, the traditional definition of a document should be clear and well understood. Or is it? In addition, in most records management 101 training we are told that "all records are documents, but not all documents are records". That is clear, too. Or is it?

Mr. Cashman drafted the following definition of a document for use by the European Parliament: "any data or content, whatever its medium, concerning a matter related to the policies, activities, and decisions falling within the institutions' sphere of responsibility". The intent of the committee was to demand that legislative dossiers be made completely public, including the positions of national delegations to the Council, and called on all EU institutions to make sure that "all documents" are contained in their registers. The Parliament stressed that legislative documents "should always be available to the public and may not be kept secret on the grounds that this could undermine the decision-making process of the institutions". However, members of the Parliament delayed a legislative vote on the issue to give EU institutions more time to reach agreement on outstanding issues, like the privacy of individuals and the definition of a document.

#### "IF A TREE FELL IN THE FOREST..."

The delay in adapting the committee's recommendations was caused, in part, by

the following statement regarding documents: "*documents*" should only include files "*formally transmitted to one or more recipients*". This argument is an age-old records management debate—can a document rise to the level of a record if it was not communicated? For example, if I wrote a memo to myself saying: "Self, I will not do as directed by management because it is unethical" is the memo a document? Yes, according to the definitions above. Is it a record? Well, that is a really good question. The answer may be philosophical in nature. It is analogous to "If a tree fell in a forest and no one heard it—did it make a sound?" If you choose to answer that in the affirmative, then a document not transmitted could be viewed as a record. If you choose to answer that in the negative, then you would argue that the document could not become a record if the content was not shared with another. Let's agree for argument's sake that the memo is a document because it satisfies the definition of a document. Let us also agree that the memo is a record because it documents a job-related decision and the content was intended to be viewed by others—at a time in the future. Writing memos for record was a normal practice by government action officers during my time of service. But the question still remains—when is a document *not* a document?

#### FROM A LEGAL PERSPECTIVE

Let's look at this from a legal perspective. Federal records law in most democratic nations state that government agencies will make the following information available to the public: "agency rules, opinions, orders, records, and proceedings". Most democratic countries, like the U.S., exempt the judiciary and legislative branches of government from this legal requirement. Documents in the executive branches of government are subject to the Records and Freedom of Information Acts. Documents in the judicial and legislative branches are not. This is our first indication of when a document may not be a document—when it is treated differently than other documents. Is the document subject to a nation's federal records act and is the document subject to the Freedom of Information Act (FOIA)? If yes, then it is a document. If no, it is generally not regarded or perceived as a document.

Under the American Federal Rules of Civil Procedure (FRCP), civil discovery is

wide-ranging and can involve any material which is relevant to the case except information that is privileged, information that is the work product of the opposing party, and certain kinds of expert opinions. It is generally accepted that the documents of all private and commercial companies and parties on either side of a court case are discoverable. Does this discovery rule apply to documents and notes created during discussions or deliberations made by members of the legislative and judicial branches in their official capacities? Again, where the answer is no, then the resulting documents are not documents.

#### THEY ARE EXEMPTED FROM CIVIL DISCOVERY

Therefore, we can safely conclude that a document is not a document when: (1) it is not subject to federal record acts and FOIA, (2) when it is not discoverable, and possibly (3) when nobody saw it or heard it when it fell in a forest...

Documents that captured the discussions and opinions of members of the legislative and judicial branches while in deliberations are, in fact, not documents because most nations exempt them from FOIA and discovery.

The members of the European Parliament have a legitimate reason for abstaining on their vote. They do have the right to know when a document is not a document, and should not vote on the proposal until after the matter is settled, legally and maybe even philosophically. On the surface, this seems to counter the aims and goals of openness and transparency that we expect from our governments. The members of Parliament cannot be compelled to disclose their "non-documents" by law but they can release them voluntarily, subject to privacy concerns. But that is a subject for another day. |

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Fortunately, comprehensive solutions are available to help organizations meet these new challenges. Web Content Management (WCM) software platforms initially emerged to ease the process of maintaining a larger-scale Web presence. But as consumers demand ever-higher expectations for personalization and interaction on the Web, organizations must respond by deploying and managing a greater, richer, more engaging Web experience,

the website, and edit, change or delete content, without any programming knowledge. These capabilities speed the process of maintaining the website and free IT from manual content update tasks. Integrated workflow processes can also ensure all content is appropriately reviewed prior to publishing.

- **Design:** Site administrators should be able to create templates for Web pages

ized websites, the capabilities provided by traditional WCM solutions are no longer enough. While basic WCM may have eased the process of creating content and launching new sites, today organizations are finding that their Web presence is playing a central role in their marketing strategies, and that they need to deliver personalized content and advanced social networking capabilities in order to connect with customers across multiple sites in multiple

**While basic WCM may have eased the process of creating content and launching new sites, today organizations are finding that their Web presence is playing a central role in their marketing strategies, and that they need to deliver personalized content and advanced social networking capabilities in order to connect with customers across multiple sites in multiple languages around the globe.**

and Web Experience Management (WEM) has emerged as a broader set of capabilities built on the WCM foundation to help them achieve precisely that. So what is WEM?

#### TAKING CONTROL OF WEB CONTENT

To better understand the role that WEM can play in managing your Web presence and meeting your business goals, it's important to consider how it was developed. WCM solutions originally emerged to address several of the basic challenges created by having a website—namely that building and maintaining a website was expensive, error prone, and slow. Previously, websites were updated manually by a staff of IT administrators and developers; business users were required to rely on this staff to implement even the most basic changes, leading to slow response times and an increasingly overwhelming job for the IT department.

Full-featured WCM tools can significantly reduce the need for manual coding and reduce the drain on IT resources by automating several key tasks required to publish content online, including:

- **Author:** Easy-to-use interfaces should allow business users to directly create new content items, such as articles or product descriptions, place them on

and sites, and business users should then be able to edit the layout of the site within the given templates, to ensure that content always looks its best while deployment times are kept to a minimum

- **Publish:** To further expedite site updates, business users should be able to push content from staging to live, with tools that ensure no dependencies are broken—for example, preventing users from approving a page if assets on that page are not yet approved—to minimize errors. Interfaces should provide administrators with a transparent view into these essential processes.

These features provide important benefits to most organizations over manual site updates and maintenance. By placing content contributors directly in control, WCM enables faster time to market for new content and even new websites. It also creates significantly greater productivity for both IT and business users, leading to fresh, up-to-date Web content as well as lower operational costs. Other advantages of adopting WCM include improved brand consistency as well as improved ability to leverage and reuse existing content.

However, as consumer expectations have grown for interactive and personal-

languages around the globe. Accordingly, organizations must evolve their capabilities for managing their websites from simply managing Web content to managing the Web experience.

#### THE NEXT STEP: MANAGING THE WEB EXPERIENCE

In this new environment, organizations cannot focus solely on managing Web content—instead, they must manage the complete experience that audiences have on their websites—a critical capability for increasing customer loyalty and sales and driving operational efficiencies. To achieve this goal, organizations must empower marketers and lines of business to create and optimize targeted content and campaigns online, and also create vibrant online communities. WEM builds on the foundation provided by traditional WCM to provide additional capabilities, including:

- **Target:** Providing highly relevant Web content that is targeted to individual users' needs has become essential to connecting with customers and prospects and providing engaging and personalized service. Web Experience Management solutions enable marketers to easily create and manage audience segments and build targeted online campaigns.

- **Deliver:** Quick response times, even for sites with personalized, dynamic content, are another important component of online success. WEM solutions that can support rapid delivery of Web content for dynamic pages that are assembled on the fly, while scaling to meet the needs of the largest organizations, are essential. Increasingly, delivery to additional platforms such as mobile devices is important, and should be an integrated module within the WEM suite.
- **Analyze and Optimize:** Tracking the success of Web content is critical to ensuring that targeted campaigns and content are resonating with audiences. WEM solutions thus must include the ability to analyze success on a highly granular level, so marketers can optimize accordingly. Ideally, data should be analyzed for specific content assets and specific target audiences, since page-level data offers relatively limited value when individual users are viewing personalized content.
- **Participate:** Customers increasingly expect that corporate websites will allow them to communicate both with the company and with fellow customers. Therefore, collaboration capabilities such as comments, product reviews and rankings, polls, user-generated content wikis, and blogs have become essential to enabling companies to build a community around their products and services and convert customers to brand advocates.
- **Conceptualize:** Social networking features also need to be used by teams to collaborate within the organization and to facilitate the creative process with partners and other stakeholders. Accordingly, a collaboration solution that is integrated into the WCM system is critical for empowering Web managers by giving them easy access to output of creative teams.  
Combined with a traditional WCM solution, these enhanced capabilities allow organizations to fully harness the power of the Web as a business and a

marketing channel. By allowing marketers to truly make customers the focus of their Web vision—and deliver a uniquely compelling Web experience to each site visitor—WEM enables organizations to meet business goals, including increasing customer loyalty, sales, customer

**In addition to assessing current needs, it's important to plan for future scale needs such as increased content, additional sites, sites in new geographies, additional content contributors, greater traffic volumes and more, as well as desired enhancements such as personalization, community capabilities, rich media management, and others.**

satisfaction, and repeat purchase rates, in addition to realizing significant business process efficiency gains.

#### MAKING THE MOVE TO WEM

So is it the right time for you to implement WEM? Since growth and change are the only constants online, organizations of all types and sizes may wish to consider WEM strategies in their Web planning. Since these capabilities can be implemented incrementally over time, based on individual needs, virtually any organization can benefit and achieve value from these solutions.

To get started, you first need to look within and assess your organization's needs. What is your business strategy and differentiation from the competition? What are your business goals? How can the Web help you achieve these goals—both today and into the future? How can you improve on the rudimentary WCM system you have in place now? And on the efficiency side: What process issues have been holding back your business and IT teams online? What tasks are difficult and costly today with respect to your customer and prospect interactions?

In addition to assessing current needs, it's important to plan for future scale needs such as increased content, additional sites, sites in new geographies, additional content contributors, greater traffic volumes, and more, as well as desired enhancements such as person-

alization, community capabilities, rich media management, and others.

Once you've determined your requirements, it's then time to evaluate potential solutions. A broad variety of WCM and WEM solutions are available on the market. Smaller organizations may prefer a

hosted or SAAS (Software as a Service) approach, while mid to large-sized companies will likely want to install a more comprehensive and scalable solution that can support dynamic content, a global scale, and advanced site features.

Finally, it's also important to remember that if you make the step to WEM, your people and processes will play a critical role in determining its success. In order for it to succeed, your executives, marketers, content contributors, and IT staff all need to be serving the same customer—they need to realize that the Web is their tool for interacting with customers, prospects, partners, and employees and for helping to achieve their business goals. With aligned objectives, your organization can start now to capitalize on its full Web potential—starting with your most pressing needs today, and building over time towards the Web presence that will provide a platform for your future success. |

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