Developing a Content Maintenance and Governance Strategy
by Seth Earley

Governance is not a simple process of writing up some plans and policies. Operationalizing governance requires the correct structures and working agendas.

The Missing Piece of Content Management
Information and content governance is frequently a missing piece of a content management plan. Think of building the new content management system (CMS) as building a new house. You design the layout of the house and requirements based on the needs of your family. Then you move into the house. In preparation for the move, you put all of your possessions in boxes and mark those boxes to indicate where they will be going in the new home. If you are moving into a larger home, you’ll likely take items that were in a single room and put them into multiple rooms.

The New Home Metaphor
Deploying content management systems is like building and moving into a new home. You need to plan the structure of the system based on the needs of your users and then need to mark all of your documents to indicate where they will be going in the new system. In some cases, content that was in one category (or room in our metaphor) will be split into multiple categories in the new system.

The migration is the move. In our house, when we recently moved, my stepdaughter packed up her own room and decided where some of her belongings were going in the new house since she had more space. She also threw a lot of stuff out (as we all did). In your content migration, part of the process of moving is getting people to take ownership of their content (their stuff) and throw away the things they no longer need.

After the Move
But what about after the move? In the new house we want to keep things in order, put things away, clean up the house and handle the day-to-day maintenance. Some maintenance is outsourced (we have a large yard that gets mowed by a service), and some is done by each member of the household.

There are rules and requirements, and there are spot checks to determine if we are doing things correctly (this is usually my wife preparing for a visit from our in-laws).

Content governance is the same. We need to assign ownership of content before moving to SharePoint or another CMS; we need to throw out the junk we no longer need – the redundant, out-of-date or trivial content (ROT); we need the people who own content and know something about content to determine where it goes in the new CMS (how the content is tagged with metadata); and we need to move the stuff (of course we hire movers for that process). In our CMS world, the movers are the IT organization, perhaps with the aid of specific tools or specialists.

But the real work starts after the move. How do we keep things clean and up-to-date? How do we prevent information sprawl? How can we make sure that people are using taxonomies and metadata correctly?

Components of Governance
Governance is the set of policies, procedures, guidelines, rules and compliance metrics that helps maintain the new household.
Governance addresses short term, day-to-day processes for creating, tagging, maintaining and cleaning up content as well as longer term goals around content requirements, system updates and development of new capabilities. Who creates content? Who tags it? What is the lifecycle of different kinds of content? How often is it reviewed? What is the process for review? How are tags and metadata reviewed and checked for accuracy, completeness and quality of tagging?

The Business Purpose

At the highest level, governance needs to define the business purpose for content. This might be done at the organizational level or may be developed on a functional level, depending on the appetite of the organization to actively manage content.

Not all content is of equal value and not all functional areas make the same use of content. Content may be strategically more important to one part of the organization than another. This difference is why understanding the business process and purpose of content is a precondition for effective governance. If we do not identify a clear business value, then we are not going to get time, attention and resources devoted to the effort.

Organizational Responsibility

Once we establish business value and business objectives, we can assign organizational responsibility for the content. Customer support content needs to be the responsibility of a senior manager in customer support or her delegate. This person is the project sponsor and has ultimate accountability for success or failure of the initiative.

The Role of a Steering Committee

The next piece of the puzzle is to develop a group that contains a broad range of knowledge about various aspects of the organization. These areas of expertise include

- business drivers and requirements;
- tools and technical landscape;
- basic taxonomy and information architecture; and
- needs of the end users.

This group is typically called a steering committee and sets high-level policy and procedures and allocates resources for the system. They can also help settle conflicts and turf battles.

The steering committee will typically make business decisions about priorities and allocation of resources. It is the entity that decides on priorities when there are conflicts among business requirements and business drivers. There is representation from various stakeholders throughout the business.

Steering committees typically don’t handle day-to-day tasks of maintenance. They are more an executive, decision-making body. People in work groups or teams do the actual work. Work teams and working groups are tasked with specific agendas around ongoing maintenance processes as well as for special projects of limited duration.

High visibility, strategic projects of limited duration, on the other hand, are typically undertaken by a task force. The distinction between a work group and a task force is more than semantic. Designating a group as a task force calls out the importance of the work and/or the cross-functional nature of the team. A task force might also include more senior level executives who can establish new policies and priorities for the business. For instance, at one publisher, a content reuse task force was created to promote cross business unit content reuse that would help to create new business models. This initiative was extremely important, and the task force was made up of a wide range of stakeholders, including senior executives.

Best Practices in Model Structures

Content management governance models come in many shapes and sizes. Small, centralized groups or large decentralized teams, depending on the size and structure of the organization, can implement them. In general, we have found that the larger and more complex the governance body, the more likely it is to fail. Therefore, we try to keep governance structures as simple as possible and limit involvement to areas that are truly affected by or have a stake in the content management system.

Layers of Governance

There are three typical layers in a governance model: strategic, tactical and advisory.
The strategic layer of governance involves one or more roles dedicated to the overall ownership and strategic direction of content processes in the organization. It includes the content management system sponsor/owner and any other roles focused on evangelism and promotion of content processes across the organization. Someone such as a senior manager for customer support needs to ultimately be in charge of the content management system. This person is the content management system owner. A CMS owner straddles the strategic layer and the tactical layer, which also includes the steering committee.

The tactical layer includes the roles of direct producer and consumer of content. People in these roles are generally involved in the day-to-day content management process and have ownership of certain parts of the CMS – potential members of working groups and task forces. They may include representatives from specific functional areas, lines of business, regions and so forth. This layer also includes the taxonomy manager, who straddles the strategic and tactical layers. The tactical layer may also include some secondary consumers of the taxonomy such as those that use it for searching and browsing.

The advisory layer involves roles that may not be directly involved in content management and curation but may need to be consulted for or advised of overall direction, be apprised of changes or be involved in special projects around the CMS. Such roles may include trainer, user experience designer, subject matter expert or representative from other committees. Groups that simply consume the content as an input to other processes may be considered part of this layer. These members often do not attend regular meetings.

Depending on its level of involvement in taxonomy management, IT may be considered tactical or advisory.

Size of a Governance Team

What size should the overall governance team that includes all these layers and structures be? Here’s the short answer: as few as you can get away with while still representing all the necessary players. The longer answer is that optimal team size is definitely between four and 10. More than 10, and it becomes difficult to run effective meetings. Less than four, and it isn’t really a governance team. That said, it is possible to have a team structure that, on paper, is larger than 10, but when you consider who will actually show up regularly at meetings, the number is still within limits.

You want to ensure that all groups that need to have a seat at the table have one but that people are clear about their roles and know whether their presence is required for regular meetings.

Who Needs to be on the Governance Team?

As usual, it depends on the organization. It is always a multidisciplinary team with many skill sets and functional areas represented.

Here are a few key areas you can choose from:
- marketing
- product management
- business intelligence
- creative/editorial
- IS/library
- IT
- site management/web content management
- UI/UX
- legal
- training

Here are a few roles that may be represented:
- executive sponsor
- taxonomy manager
- content creators/editors
- content managers
- librarians
- regional representatives
- line of business/functional area representatives
- search specialists
- system owners
**Where Should I Start?**

You can assume the need for a CMS sponsor and lead at the strategic level and see if this is an easy place to lead the discussion.

Otherwise, the best place to start is with representatives who will own content in the CMS. They form the bulk of the team and are the heart of the day-to-day operations – the tactical team. They will also give you an idea of how big your team is shaping up to be. If the CMS is big and ownership is split across 15 groups, for instance, this spread is an indication that you likely will not be able to have one, joint, content management meeting with everyone, but rather that you may need to split your team into a few sub-teams or come up with processes that mitigate having this many stakeholders.

Once you have identified your core tactical team, you can start filling in the peripheral players. Remember to limit yourself to people in roles that will be affected by or need to have a say in content matters. You can always add people later, but it is hard to cut people once they are included.

**Working Agendas**

The purpose of your governance organization is to make sure that content is managed effectively and that the CMS meets the needs of users. This means that correct lifecycles are established for information, that content is tagged appropriately based on its value to the organization, that taxonomies are maintained and leveraged correctly (in tagging, search and IA) and that systems function as required and updates that meet the changing needs of users are carried out cost effectively.

It is also important to continually examine the structure of the governance team and determine what changes need to take place to ensure problems are solved and market needs are addressed ahead of time. For example, a publisher needed to anticipate the role of e-books in evolution of its business model. This new line of business was not the responsibility of the content management team (it was in the purview of product management), but in this case, the content team investigated tools and technologies and created the capabilities that allowed the publisher to migrate content to e-readers.

Here, a task force with a working agenda was created specifically to address this challenge. The working agenda included technology evaluation, prototyping, content tagging, XML structures and migration. The ability of the CM governance group to handle this project reflected the continual examination of their goals in the context of the needs of the business. This task force made it much easier for the organization to extend its business model to e-books once the market was ready.

**Conclusion**

Developing a CMS and not including governance and maintenance is like building a house and not budgeting for upkeep. It will be great for a while, but will soon fall into disrepair. Just as you would never move into a new home without planning on upkeep, don’t make that mistake with your content management systems and tools.