2019

INNOVATE

Digital Transformation Made SMARTer

Rationalize your Documents the Right Way

Afthab Badimoole, Project Manger at Smart Communications

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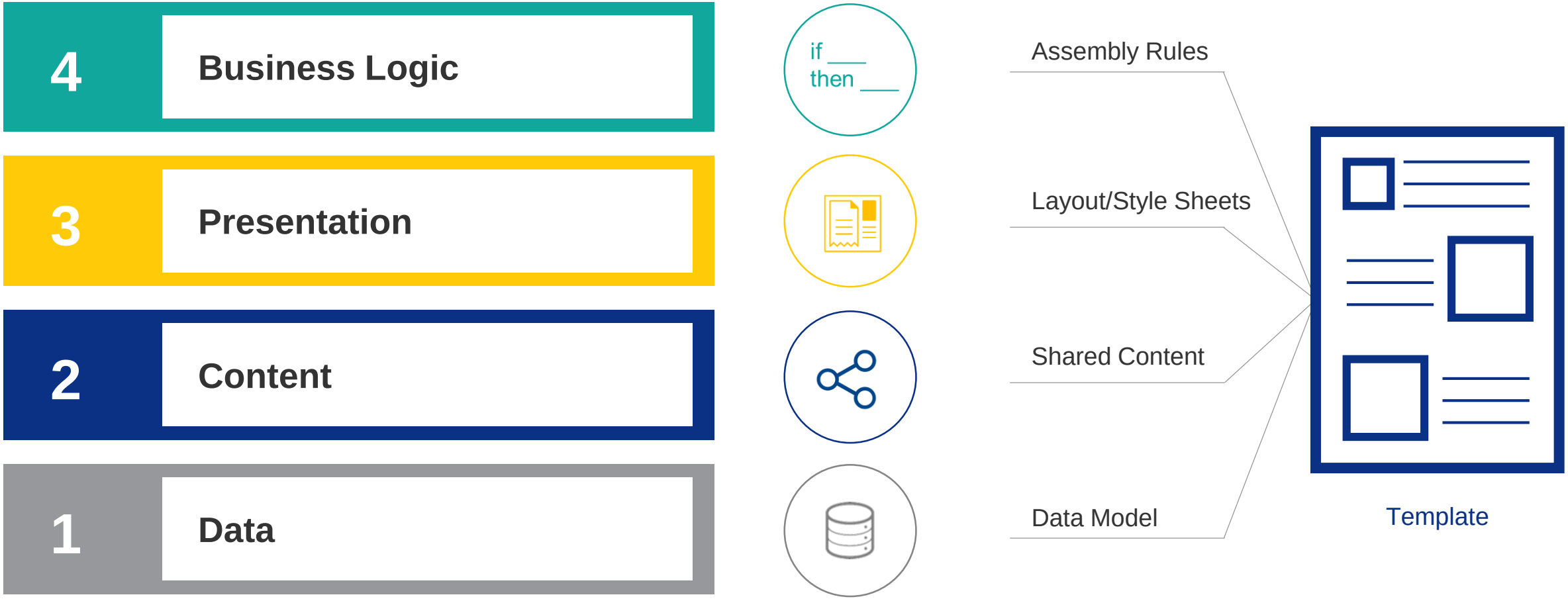
4-Layer Model



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Rationalize?

- Efficient
- Creation of documents efficient
- Leverage Smart Communications
- Observations and findings

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Rationalize vs Redesign

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Rationalize

- Optimize
- Use Shared Content
- Efficiency
- Maintenance

Redesign

- Meet Corporate Standards
- Consistency

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Pain Points

Share any personal experience

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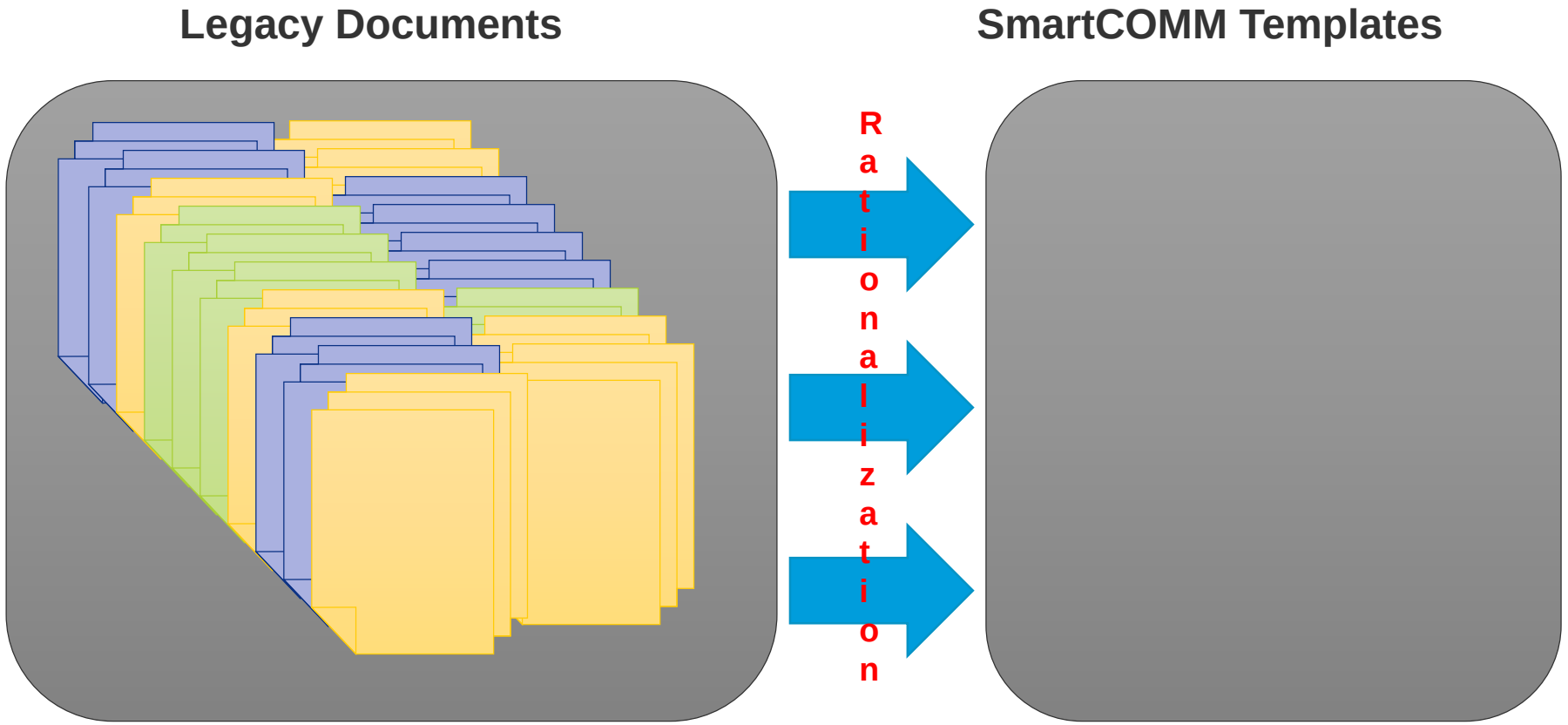
Rationalization



Step 1 – Confirm inventory

Step 2 – Acquire template samples

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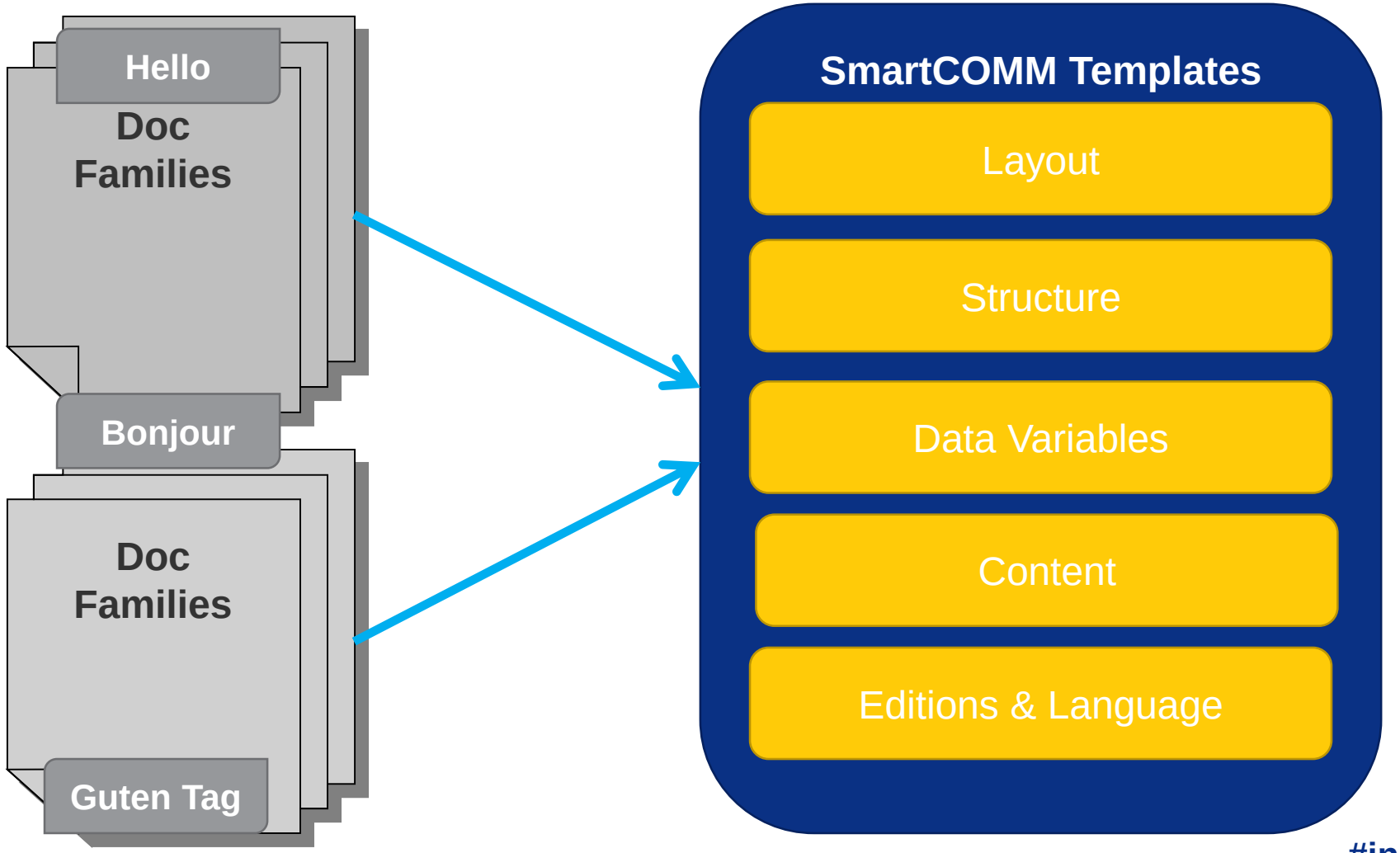
Document Families



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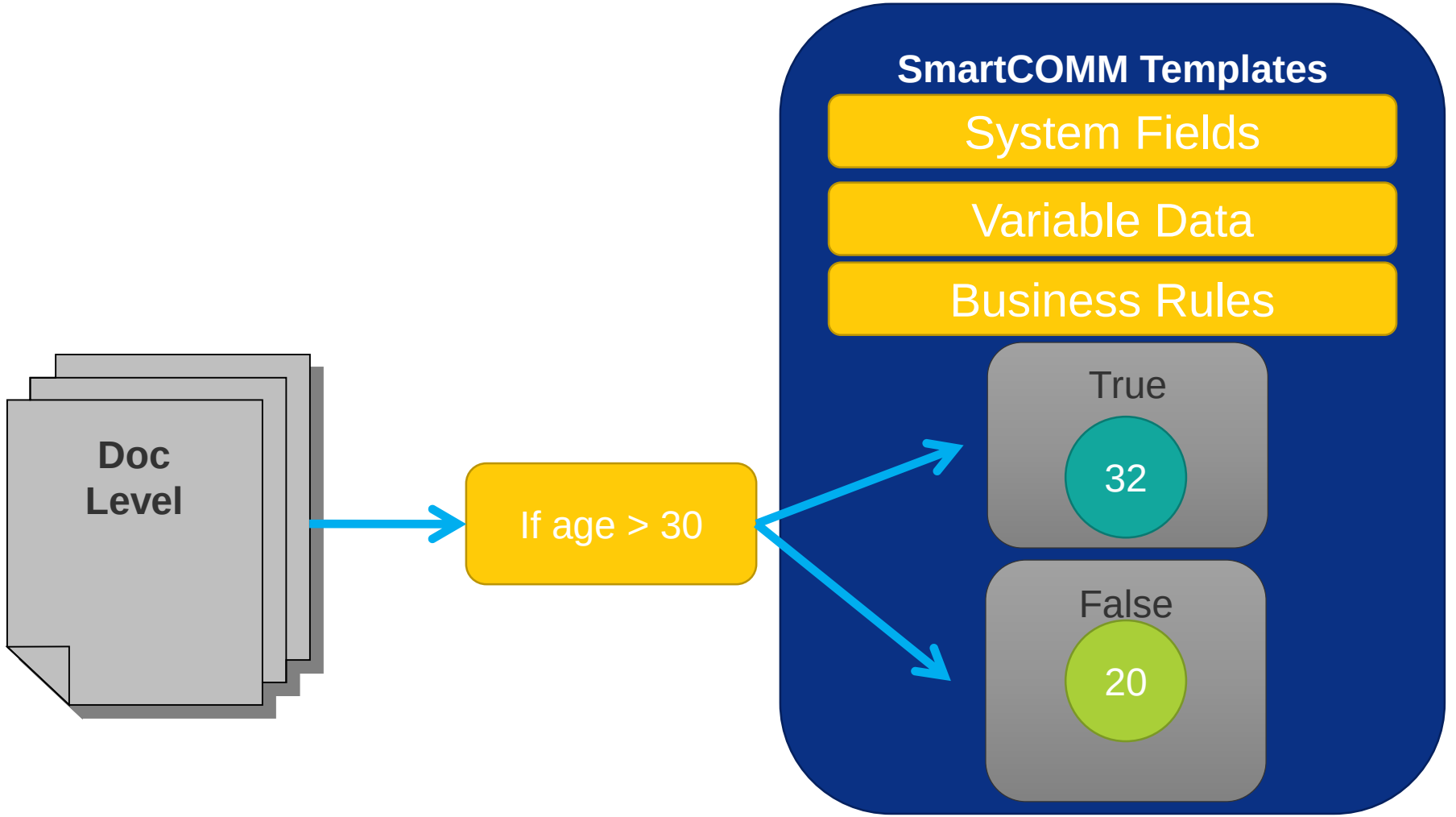
Document Level Rationalization



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Specification example

Variable Data

Shared Content

Rules

Business User Edits

System Generated

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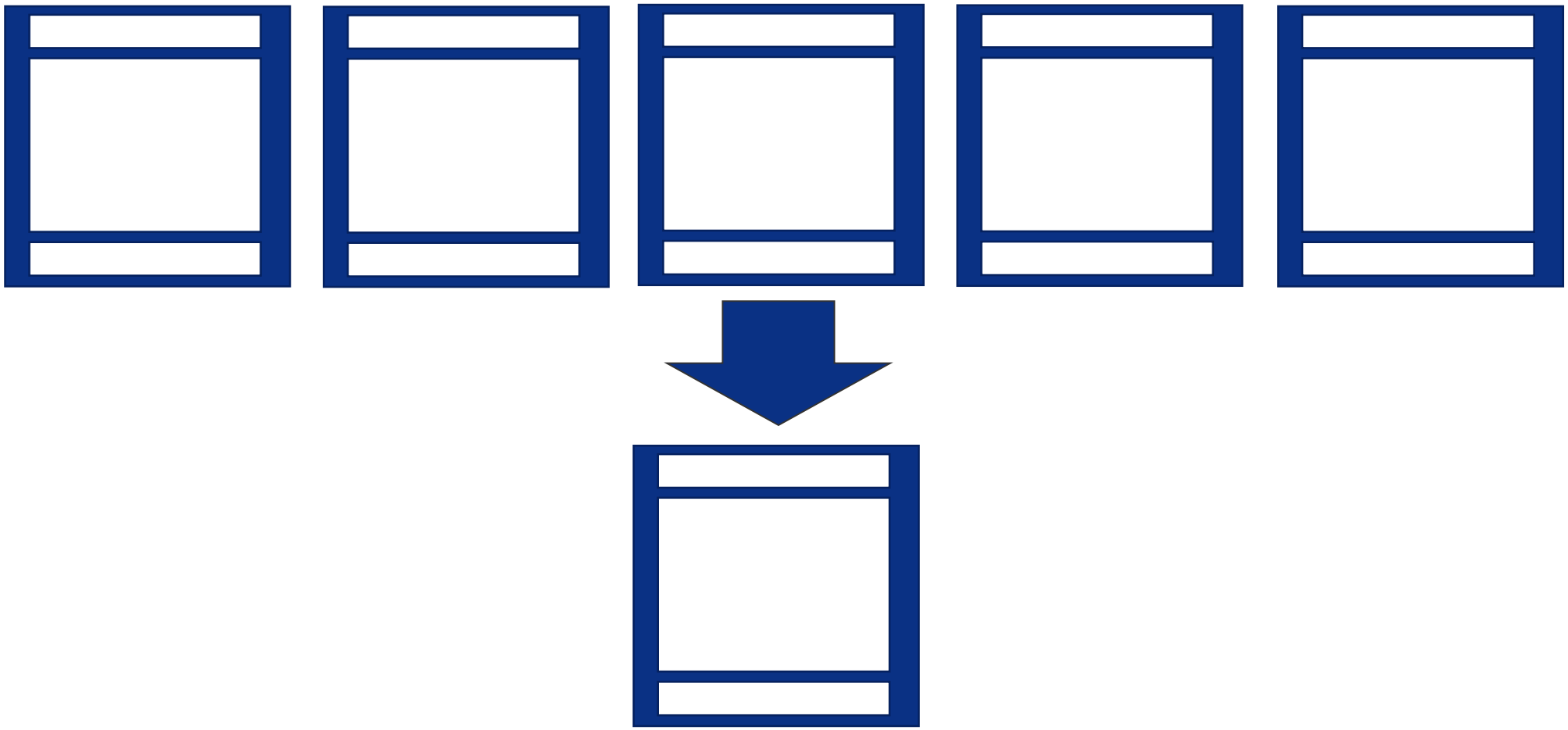
Merge Communications Together

Focus of Rationalization: Consolidation & Standardization



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Shared Content

What is a good number?

Do not add because content is replicated in another template

Can be images, tables, sections

Variable data

- Pass only required fields

Shared content inside shared content

Tips

Structure the CMS using a tiered approach

Establish standards

- Use date fields when available
- Keep layouts simple
- Utilize base templates

Content ownership

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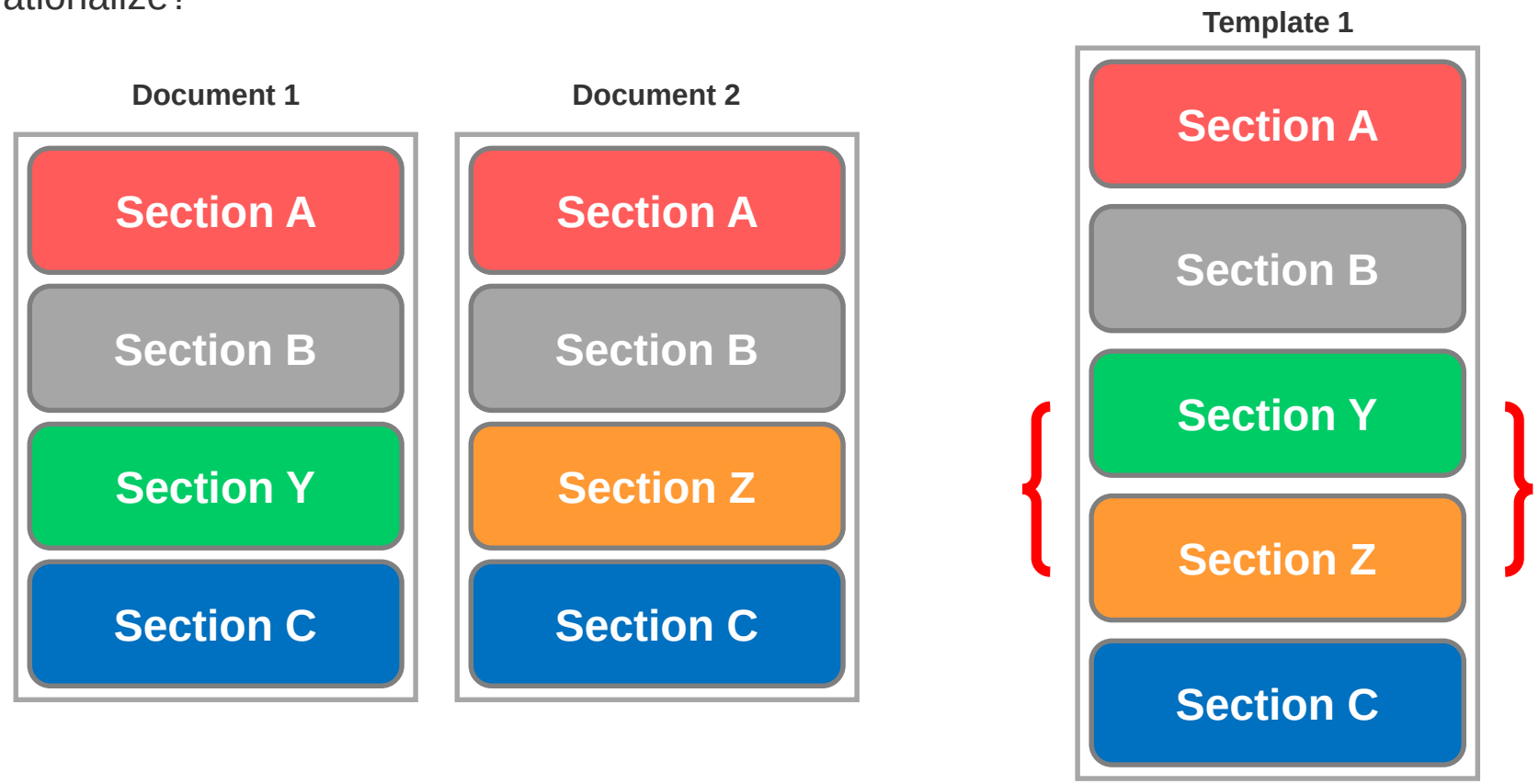
Rationalization: Example 1

In this example, both documents contain common content and some differing content.

How would you rationalize?



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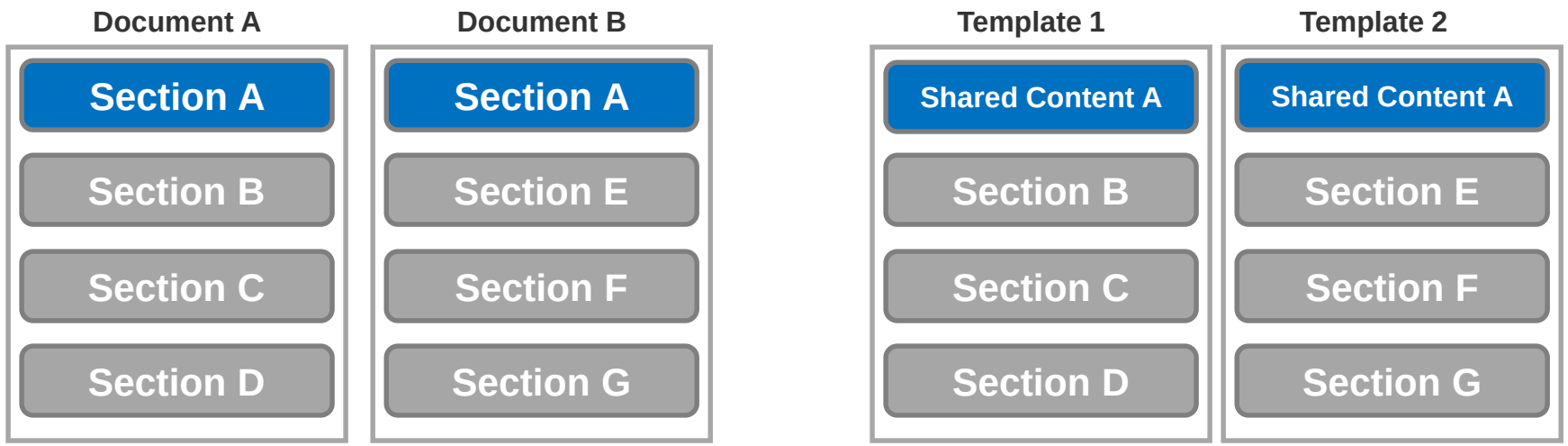
Rationalization: Example 2

In this example, the documents have one piece of content that is similar or the same, but most of the content in the documents are different.

How would you rationalize?



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