Multilingual Communications as a Business Imperative:

Why Organizations Need to Optimize the Global Content Value Chain

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Executive Summary

In today's global economy, multilingual communications are the conduit to multinational revenue profiles and global brand recognition. Buyers in countries large and small are increasingly demanding local-language materials as a condition for purchasing products. Laggards that deliver multilingual products and services late to regional markets lose market share in key geographies and see their global brand fragment and decline in value. According to McKinsey & Co., new product introductions that are delayed by six months or more lead to a 33% reduction in long-term profitability over the life of the product.[1]

While most organizations recognize the need to address localization and translation in tandem with content creation and management, they are often stymied, even overwhelmed, by how to achieve this. Collective responsibility is the means to the global goal, but ad hoc, siloed approaches are the norm. What's more, many organizations omit localization and translation as part of the core content lifecycle, treating these processes as incidental black boxes from which "source content goes in and translated content comes out."

Despite trends toward local-language information as a factor for enhanced customer experience and competitive advantage, content globalization continues to be relegated to the final stage of product delivery. Although many organizations are currently producing content in a wide range of languages, conversations about improving processes and technologies have yet to rise from the departmental and regional level to an enterprise-wide discussion.

Progress is being made, however, slowly but surely. Gilbane first explored the challenges facing companies with requirements for multilingual business communications in early 2006 with an in-depth look at approaches to integrating content and translation management systems. Gilbane Group established a formal practice area for content globalization in January 2007. The practice's mission is to help buyers and adopters of content technologies understand the key trends in managing multilingual content and make informed technology choices. Our work with vendors, users, and investors has convinced us that improving the processes associated with multilingual communications is essential to surviving the now-global economy. We believe that there is a significant opportunity for cross-industry learning about success factors and common points of failure.

This study is intended to shed light on the current state of content globalization and the challenges facing companies who are impacted by new business mandates for improved multilingual communications. To our knowledge, this report is the first of its kind to investigate practices from two different perspectives: from that of the content

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[1] Reinertsen, Don. *McKinsey study on the Value of Development Speed.* 1983.
http://www.reinertsen.co.uk/Biography.html

management professional and that of the language professional. Other reports that have focused on the localization and translation industries have taken a narrower scope than this research, which attempts to put localization and translation practices into the larger view of an enterprise content management strategy. We believe that this report is also the first to be presented by an independent voice, separate from supplier-produced case studies, informative though they may be.

The focus of this report is on the current state of multilingual communications practices, larger business and economic factors that are forcing change, organizational experiences to date – both good and bad, and issues that loom on the horizon. The market for technologies and services for content globalization is still in its early stages. As such, this study is the first in a series to be published by Gilbane Group. The underlying research has given us a foundation for a multi-year research agenda that will explore broad as well as narrow issues.

This study is designed for two primary audiences:

- For enterprise adopters and buyers of technologies and services for producing high-quality multilingual content. The study is meant as a tool for educating executives and staff who might not be aware of the significant impact that investment decisions in multilingual communications have on the organization's ability to compete effectively. It will help program and project managers learn from the experiences of other companies, and it will provide insight into making the business case to upper management for more and better investments.
- For suppliers of technologies and services. The study is meant to help you develop offers that alleviate pain points and address obstacles and challenges, and to market and position those offers in ways that make their value clear to buyers.

We also hope that the study, the underlying research, and the reports that will follow in the future will serve the industry well by providing a basis for dialog that moves content globalization practices forward and grows the market for technologies and services, which benefits all constituents.

Finally, we cannot thank our study respondents enough for their time, talent, and dedication to improving processes in their areas of expertise. Our anonymous and named respondents represent the very best in pioneers and "operational champions" in content and localization/translation management. We are grateful they chose to share their stories with us and more importantly, with our readers.

Study Highlights

Based on in-depth interviews with mid-level and senior management, this study finds:

- Major gaps between corporate goals for global expansion and the actions taken to achieve them.
- Challenges in achieving a balance of centralized and regional operations and the consequences of ignoring this dilemma.

- A lack of integration and interoperability across authoring, content management, localization/translation, and publishing components.
- The emergence of formal, organized strategies for addressing these issues, driven by the mandate to improve multilingual communications delivery to support corporate globalization goals.

The push towards multinational business, a new basis for sustainable competitive advantage, and the burgeoning volume of content required to run the business are compelling organizations to rethink how to manage content assets. Defining the role of multilingual communications in globalization strategies is integral to this endeavor.

Research Methodology

During the spring of 2008, the Gilbane Group conducted a series of in-depth interviews with 40 content and translation/localization management practitioners in multinational organizations. Using a case study approach, we probed respondents on:

- Organizational plans for global growth, including the perception and priority of multilingual communications in globalization strategies.
- Multilingual content production in operational areas such as technical documentation, customer service, and marketing.
- Obstacles in content and localization/translation management processes, including opportunities for more effective use of technologies and services.
- Successes in current multilingual communications initiatives and plans for the future.

The result of this research is provided in the following sections:

- Multilingual Communications as a Business Imperative
- The Emergence of the Global Content Value Chain (GCVC)
- Real-World Scenarios: What's Happening Today
- Evolving the GCVC: Desired State
- Emerging Best Practices
- Looking Beyond the Research
- Conclusion: Toward a GCVC Capability Maturity Model
- Best Practices Profiles

Study Demographics

Organizations included in this study have headquarters or major divisions in countries such as Belgium, Denmark, France, Germany, Ireland, the Netherlands, Switzerland, the United Arab Emirates, the United Kingdom, and the United States. Representing a range of verticals including manufacturing, computer software/hardware, retail, travel, healthcare, and consumer goods, all organizations were currently producing multilingual content:
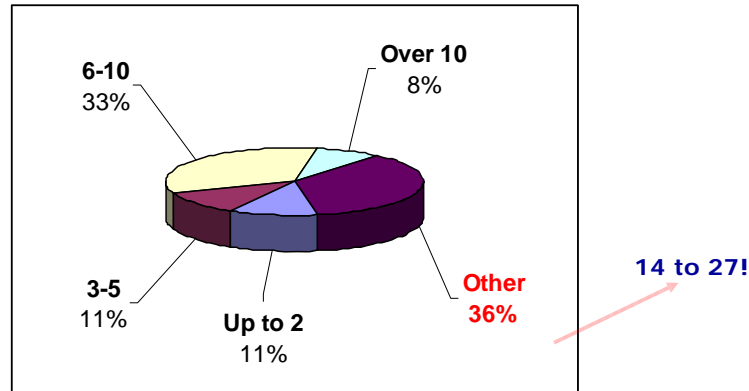
Figure 1: Language Outputs of Survey Population

The operational roles of our respondents included executive, business management, marketing, IT, technical documentation, and localization operations. In many cases, we noted organizational titles that reflect years of concentration in content and localization/translation management and as a result, growing recognition of the value of this expertise within organizations. Consider the following job titles represented in the survey population:

- Content Management Practice Leader
- Director, Global Language Services
- Worldwide National Language Support Executive
- Senior Manager, Global Internal Communications
- Senior Manager, Globalization Technology
- International Marketing Manager
- Vice-President, Localization
- Global Program Manager

Our respondents also included professionals from a range of company sizes, from very large (5000+ employees) to smaller organizations (less than 999 employees):
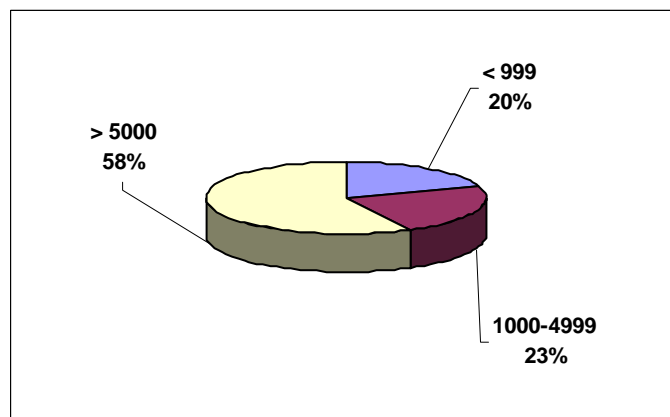
Figure 2: Respondents by Company Size

Multilingual Communications as a Business Imperative

Helping organizations understand, articulate, and communicate the role of multilingual content within corporate globalization strategies was the overriding goal for this study. The market forces identified below – multinational business, a new definition for competitive advantage, and providing relevance amidst increasing volumes of information – call for organizations to redefine the value of content to:

- Drive global customer experience
- Increase customer satisfaction
- Promote brand awareness and consistency
- Support time to market goals

Gilbane believes that redefining content value includes a progression away from a one-dimensional, monolingual approach to information creation, management, and publishing and toward the delivery of multilingual communications that are relevant to geography and culture. Given high organizational expectations for revenues from multinational operations and explicit customer demand in numerous global markets for content in the language of their choice, multilingual communications is an explicit part of the evolving formula for sustainable competitive advantage.

Market Context: Content Value in a Global Economy

Three broad market forces are changing the way organizations deal with their content assets: the push towards multinational business, a new basis for sustainable competitive advantage, and the burgeoning volume of content, data, and information required to run the business.

1 Pie charts in boardroom presentations and annual reports reveal a changing picture of worldwide revenues for 2008 and beyond. Fewer pies have one big slice that is larger than others (especially pies baked in the United States), and more pies are cut into more pieces of more even size. Statistics supporting the charts abound, such as the report by insurance underwriter Chubb that 71% of 212 executives expect revenues from foreign operations, foreign sales, and/or imports to increase, and three in four companies plan to expand their operations outside the United States and Canada this year.[2] Some companies have been remarkably successful, to the point where revenues from outside the headquarters country comprise more than half of their business. 3M, Bayer, Canon, Caterpillar, GlaxoSmithKline, Hewlett-Packard, IBM, Intel, Merrill Lynch, Nike, and Siemens are just a handful of examples.

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[2] Chubb, *2008 Multinational Risk Survey.* http://www.continuitycentral.com/news03896.htm

Multinational business is driving profits as well as revenues. For U.S.-based companies, Citigroup estimates that corporate profits earned abroad in 2007 jumped 45%, while profits earned domestically turned negative in 3Q 2007.[3] Growth through acquisition is also increasingly international. According to Merrill Corporation and The Mergermarket Group, cross-border merger and acquisition activities have increased steadily over the last three years, with close to 1,000 transatlantic M&A deals conducted in 2007 alone at a value of more than $480 billion. A critical success factor for cross-border deals? The ability to communicate information clearly and accurately in multiple languages.[4]

2 A second force of change is the evolving definition of sustainable competitive advantage, historically measured by product-centric characteristics. Today's products are more complex, more customizable and configurable, and have shorter lifecycles. Increasing this complexity is the fact that the traditional definition of product continues to evolve, blurring the lines between tangible goods and virtual experiences. Second Life is the most obvious example of the latter, begging the question, "when is an avatar in an intangible environment an actual product?"

Today's global economy makes it nearly impossible for any company to create long-term sustainable advantage based on product alone. In fact, the basis of competition is undergoing a permanent change to differentiation based on organizational process "know-how," global customer experience, and brand management. Multinational companies are building their core competencies in these areas and not on products, whose competitive advantage is ephemeral rather than sustainable over the long term.

Brand deserves further discussion since like content, it needs to be treated as a corporate asset and has two important dimensions: multichannel and multinational. An organization operates in one country in one language, but reaches customers through multiple channels. Consider, for example, the number of ways that retail banking touches customers: physical locations, online, in print, and via mobile devices. Financial institutions need content strategies that preserve brand while tailoring content to take advantage of specific capabilities offered by the channel (e.g., interactive media for web experience).

The global economy raises the brand challenge to an entirely new level. Regional languages and local sensitivities are essential elements to engaging multinational audiences on their own terms of business, but at the same time, global brand must be enforced and promoted. This balancing act defines the job of most Chief Marketing Officers in multinational organizations.

3 The third force of change? The volume of content, data, and information required to run a business. Global expansion only exacerbates the need. Brand

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[3] As reported by the Chicago Tribune, http://www.chicagotribune.com/business/chi-thu-europe-investors-may29,0,382145.story

[4] Merrill Corporation, *How to Do Better Multilingual M&A Deals: Making a Difference with Language Translations*, 2008

content that establishes consistent messaging for marketing products and services to global audiences. Product content to document and support those products and services in geographically-dispersed territories. Operational content to manage global sales, manufacturing, channels, and compliance. Enterprise content to communicate worldwide with global workforces, shareholders, and investors. More worldwide reach, more business, more customers, more workers – more content, data, and information is simply a fact of global life.

More volume, however, requires more *relevancy*. In a global economy, where customer experience edges out products and services in the formula for sustainable competitive advantage, simply providing a lot of content can do more harm than good. Content in the language of the intended receiver, content that's pertinent to the intended message, content that's consistent with global brand – these are the characteristics of using the third force of change to one's advantage. Mere content is no longer king; the dynasty ruling the global economy is relevant content based on:

- Personalization that cuts though information clutter.
- Localization that tunes information and messaging to specific language and culture.
- Immediacy of delivery to address lower tolerance for time delays.
- Delivery of content through multiple channels.

These market forces have profound and far-reaching implications for corporate globalization strategies, customer satisfaction, and Enterprise Content Management (ECM) as a business practice.

Pushing the Boundaries of Content Management

All organizations run on content, regardless of whether they are profit or not-for-profit, public or private sector, large or small. Content is therefore a significant corporate asset that must be managed like any other asset, with people, processes, and technologies in place to maximize its utility and value to the organization. This is the main premise behind the practice of content management and the market for content technologies that has been established over the past few decades.

The premise is sound, but a global economy adds new dimension to an enterprise content management infrastructure. This report underscores a primary requirement – the need to produce multilingual content as appropriate for targeted global trade and business expansion. Doing so however, is much more than the act of translating one word to another. Truly localized content, more than just red = rojo, is impossible to produce without cooperation, collective responsibility, subject matter experts (SMEs), and automation. The best practice profile on Powerwave Technologies highlights a company that understands the importance of assessing and addressing cultural

"If I'm selling to you, I speak your language.

If I'm buying, dann müssen Sie Deutsch sprechen."

Willy Brandt, former German chancellor

expectations in localization/translation processes for specific countries.

A well-established industry for language services, currently pegged at approximately USD 12 billion has long addressed this need. [5] However, market forces are putting more pressures on the industry at large as well as on suppliers and buyers of translation services. Current practices for localizing communications for specific regions and translating content into multiple languages are still largely standalone, over-the-wall processes that exist outside of the flow of enterprise content.

In fact, many organizations have not yet integrated localization and translation management within the practice of content management, nor into its supporting infrastructure. Often relegated to an after-thought, the "island" effect elongates global expansion plans and prevents scalability. Siloed technologies and processes simply cannot keep pace with prospect and customer demand for relevant content in multiple languages.

The software industries for content and localization/translation management have been slow to provide interoperable solutions that meet enterprise integration and scalability requirements. But software provider and buyer alike understand that speed and operational efficiencies are paramount to leveraging global investments. From this perspective, there are a number of technology mandates that are pushing the boundaries of current content management strategies. Some capabilities are readily available now, the result of software vendors that are anticipating and responding to buyer demand. Others have a firm spot on the industry "to do list" and should be viable, integrated capabilities by mid-2009. As always, the caveat is that new technology capabilities require organizations to identify the people and process components affected by inevitable re-engineering and most importantly, to prepare a strong plan for change management. A partial list of "boundary-pushing" technologies and capabilities includes:

- Authoring assistance at content creation to promote localization-ready content.
- Centralized terminology management that defines repeatable words and phrases for monolingual and multilingual authoring.
- Reuse processes that extend the definition of multichannel to multi-purpose, enabling consistency across product, web, operational, and enterprise content.
- Higher levels of collaboration among cross-departmental and regional content stakeholders to mitigate the risk of brand dilution or worse, brand deterioration.
- Integrated and automated processes that connect content management with translation management solutions, authoring environments, and multichannel publishing.
- Content analytics and reporting for iterative web site improvement.

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[5] Common Sense Advisory, Inc. *Ranking of Top 25 Translation Companies.* May 2008.
http://www.commonsenseadvisory.com/members/res_cgi.php/080528_QT_2008_top_25_lsps.php

- Inclusion of translated user-generated content (USG) in emerging corporate and consumer social computing environments.

If we look at how the boundaries of content management are being pushed and pulled by market forces, we see that the new shape of enterprise content strategies can be defined in terms of value propositions.

Strategy Component	Value Propositions
"Audience aware" content	Customer satisfaction
Global brand consistency	Brand equity
Collaboration among distributed resources	Process efficiency
Automated, integrated translation processing	Higher quality; faster time to global markets and revenues

Table 1: Value-Driven Enterprise Content Strategies

Focusing on content value in all its forms provides organizations with a framework to assess the benefits of multilingual communications. It also helps prioritize content-driven initiatives according to specific business objectives or major pain points.

At first glance, it seems quite obvious to consider content investments in terms of the value delivered to corporate globalization strategies. If this is so obvious, then why is Gilbane writing about the need for multilingual communications as a business imperative? Because while both need and benefit might be obvious, the path to execution is anything but, for a myriad of reasons discussed throughout this report. And although that path is difficult, Gilbane believes that multilingual communications are essential for competitive advantage and not a business option. Evidence is starting to emerge that companies are beginning to see this need, recognize the obstacles, tackle the issues, and realize success. We present some of that evidence in this report.

The Impact of Global Workforces

A multinational organization naturally employs a global workforce, which pushes the boundaries of enterprise content management along two dimensions.

- Content and the resources for creating, managing, localizing/translating and publishing it are typically distributed throughout the world.
- Even if organizations have designated an official language for conducting business, there is often a need for multilingual content for internal audiences. Policies and procedures related to human resources management are a primary example; Canadian law as described in the country's Official Language Act has long mandated the availability of content in both English and French.[6]

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[6] Office of the Commissioner of Official Languages. *English and French in the workplace…what federal employees need to know.* http://www.ocol-clo.gc.ca/html/work_trav_2_e.php

The first issue has significant impact on enterprise content strategies, as it defines a fundamental tension between centralized and regional decision-making and resources. Identifying the right mix and managing it efficiently is essential to scaling content strategies and infrastructure to accommodate multinational workflows and increasing volumes of communications. Moreover, a global workplace is often defined by multiple, distinct and usually siloed "hubs," in which decision-making is driven by tactical sales or customer-driven demand. So, in some cases, localization/translation processes is a high priority. In others, providing multilingual communications continuously falls to the bottom of the "list of the day." We discusss this further in the section entitled *Optimizing the Process Balance: Centralized and Regional Collaboration*.

Even though decisions made by individual in corporate hubs often address and sometimes fix impending crises, they are usually made in isolation, enabling the risk of inconsistent global messaging and redundant actions. In effect, global workforces have created an unprecedented need for increased collaboration for business operations, including content-driven initiatives.

Redefining the Borders: Multilingual Communications in Corporate Globalization Strategies

We believe that organizations require a cohesive globalization strategy that includes the notion of, commitment to, and delivery of multilingual communications to support corporate objectives. It is important to understand what this means in real-world terms. A "strategy" is an organization's approach to using resources in order to achieve a set of goals. At the highest level, a company formulates a set of corporate goals, and then devises a corporate strategy for how the company achieves those ends.

Let's break it down. First, *globalization* is the process, resources, and actions that address the business issues associated with taking products, services, and information to global audiences. A *globalization strategy*, then, is a formal approach to how a company achieves this endeavor. Gilbane believes that multilingual communications are a significant element of a globalization strategy, requiring the following components:

- **Planning**
  - Executive endorsement.
  - Project leadership from operational champions.
  - Cross-departmental and cross-regional planning.
  - Change management anticipation.
- **Education and knowledge management**
  - Published objectives tied to annual or multi-year corporate initiatives and goals to establish shared understanding across the enterprise.
  - Balance of centralized and distributed decision-making for localization/translation requirements.
  - Agreed upon mix of centralized, departmental and regional funding.
  - Priorities for different information types.

- **Formalized processes**
  - Governance policies for the depth and breadth of multilingual communications, project management, and the use of Language Service Providers (LSPs) and independent localization/translation contractors.
  - Reuse and repurposing strategies for multilingual communications content types, including product, brand, product, operational, and enterprise content.
- **Infrastructure**
  - Technology infrastructure components including requirements, usage, and integration.
  - Resource allocations.
- **Metrics**
  - ROI scope with clear goals, defined key performance indicators (KPIs), and milestone requirements tied to timelines.
  - Measurements that direct the approaches for planning, education, formalized processes, and infrastructure.

The overwhelming majority of study respondents agreed with, but could not cite the existence of most of these components within their own organizations. Overall, a lack of executive sponsorship and formal empowerment to make decisions stalled or prevented operational initiatives that could positively impact corporate goals for global expansion. However, results from this report and the stories within Best Practices Profiles demonstrate that respondents are finding pragmatic avenues to raise the visibility, priority, and investment in multilingual communications in spite of a range of challenges.

The Emergence of the Global Content Value Chain (GCVC)

The Global Content Value Chain is a strategy for moving multilingual content from creation through consumption according to the needs of its target audience. The strategy is supported by practices in disciplines such as content management and localization/translation management. The enabling infrastructure for the strategy comprises people, process, and technology.

In response to market forces and the subsequent reshaping of content management strategies to better deal with multilingual business communications, Gilbane sees the emergence of what we describe as the *Global Content Value Chain* (referred to as "GCVC" throughout this report).

The GCVC is an overarching strategy for managing multilingual content from creation through consumption according to the needs of its target audience. Its central premise is that value can be added to the content as it moves through the chain by applying people, process, and technology elements at each phase. Figure 3 illustrates a generic model for the GCVC at a high level.
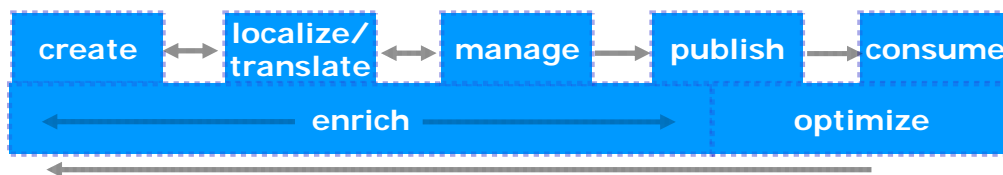
Figure 3: Global Content Value Chain

Most of the components of the chain are self-evident. Three bear brief comment:

- **Consume.** Consuming content (or putting it to work) is now a part of the flow of enterprise content strategies largely because the rise of social computing has broken static publishing models. Blogs, wikis, and other types of user-generated content now enable bidirectional content flows. Audiences that consume content are increasingly likely to add new content or extend existing content.

- **Enrich.** Enriching content by applying metadata for a variety of content applications (including enterprise search and personalization) is a proven mechanism for increasing its relevance, value, and practical use. Enrich spans several of the components because metadata can be created at several points in the components that comprise the chain.

- **Optimize.** Optimizing content involves testing, measuring, and improving its ability to meet business objectives. A common application is web content analytics, the practice of making continuous changes to content so that it produces the desired result (e.g., conversions of visitors to customers or a retranslation to lower the cost of international support calls).

The GCVC is patterned after the concept of a supply chain. The similarities and differences are instructive. We start with a definition of supply chain:

> *The **network** of manufacturers, wholesalers, distributors, and retailers, who turn **raw materials into finished goods and services** and deliver them to consumers. Supply chains are increasingly being seen as **integrated** entities, and closer **relationships** between the organizations throughout the chain can bring **competitive advantage, reduce costs**, and help to maintain **a loyal customer base**.[7]*

We emphasis of some of the terms to illustrate commonalities between supply chains and the GCVC:

- Both chains comprise a network of multiple participants, each with unique and specialized capabilities.
- The chains convert raw materials into finished goods. In the case of the GCVC, the end-product is content in multiple languages.
- The chains are increasingly integrated – connecting, automating, and streamlining discrete processes with technology.
- Relationships between participants in the network result in business benefits such as competitive advantage, reduced costs, and customer satisfaction.

These commonalities provide a reference point for explaining the GCVC to executives and department stakeholders. The concepts are identical: networks of participants, raw materials into final product, and integration. The potential benefits are identical: competitive advantage, cost savings, and satisfied customers. Adoption patterns are also likely to be similar: tactical business benefits in the short term, strategic benefits in the long term; challenges that include overcoming silos and aligning global resources, and leveraging technology consolidation to facilitate integration.

The difference between a supply chain and a GCVC is that network participants don't just transform raw materials into finished goods—they can also *increase the value of the materials* as they move through the chain. Content serves multiple objectives, such as technical documentation of complex products, brand communication on web sites, or proof of regulatory compliance. Regardless of the GCVC application, however, we can identify content attributes that impact value for multilingual business communications:

Value Attribute	Impact
Accurate	True and credible localized translations
Accessible	Meets international accessibility guidelines
Brand-worthy	Reinforces corporate and product brand
Consistent	Reliable information across all channels and content types
Quality	Grammatically and linguistically correct

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[7] BNET Business Dictionary, as published by ZDNet.

Value Attribute	Impact
Relevant	Contextually appropriate and culturally sensitive
Reusable	Can be leveraged repeatedly in persistent ways
Timely	Supports current business initiatives
Usable/utility	Communicates effectively, resulting in the desired behavior on the part of the content recipient

Table 2: Value Attributes of Multilingual Content

The "value" in the GCVC refers specifically to the ability to add worth to content by consciously improving these attributes as it moves through creation, localization/translation, management, publishing, consumption, optimization, and enrichment. People, process, and technologies elements, in various combinations, are the mechanisms for adding this value.

The GCVC as illustrated in Figure 3 is a high-level view of the process flow for multilingual communications. It serves as a model that can be adapted to suit the requirements for different types of applications, such as product content (i.e., technical documentation), brand content (i.e., web marketing materials), operational content *(i.e.,* sales, manufacturing, channels, and compliance information*)* or enterprise content (i.e., human relations policies and procedures).

Drawing on our perspectives as analysts and based on our consulting engagements with enterprise clients, our observations and experience indicate that to date, the majority of content globalization investments have been in customer-facing content such as product and brand content. This frame of reference shaped our research. Although the door was open to discussing all types of content applications in our research, we looked specifically for evidence that significant focus is in fact being applied to multilingual content for product and/or brand applications. The evidence that we uncovered is reported in this study.

Before discussing what we found in practice, however, it is useful to understand how the GCVC accommodates different content-driven initiatives and applications.

GCVC for Product Content

"Product content" refers to content about product use (primarily for manufactured products) and includes technical documentation, online help, and a variety of pre- and post-sales materials such as datasheets. Product content has longer shelf life than many other kinds of content. Depth of translation (that is, the portion of a particular piece of content that is translated) is a larger issue than for, say, brand content. The content itself has stronger ties to engineering systems such as product lifecycle management or product data management systems and tends to be more rigorous. Structured authoring and content management have very strong roots in this domain; SGML/XML, granular content management, and single-source publishing are well established practices.

Multilingual Communications as a Business Imperative

These and other characteristics of product content have a distinct impact on the shape of the GCVC and on the people, processes and technologies that it encompasses, as shown in Figure 4 and discussed below.
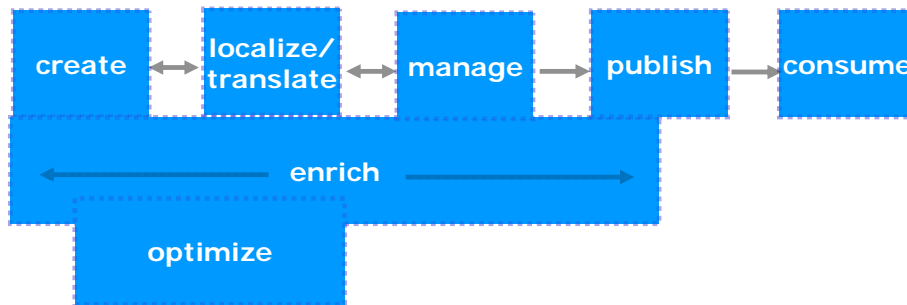
Figure 4: Global Content Value Chain: Product Content

The most obvious difference in the product content instance of the GCVC compared to the generic model in Figure 3 is that adding value through enriching and optimizing content is "front loaded" rather than occurring throughout the process. This is because in most cases, product content is static once it is published and shipped or distributed with the product that it supports. Opportunities to enhance it mostly occur before the content is "frozen" before dissemination. The illustration in Figure 5 provides an example of some of the people, process, and technology elements that are specific to product content applications.
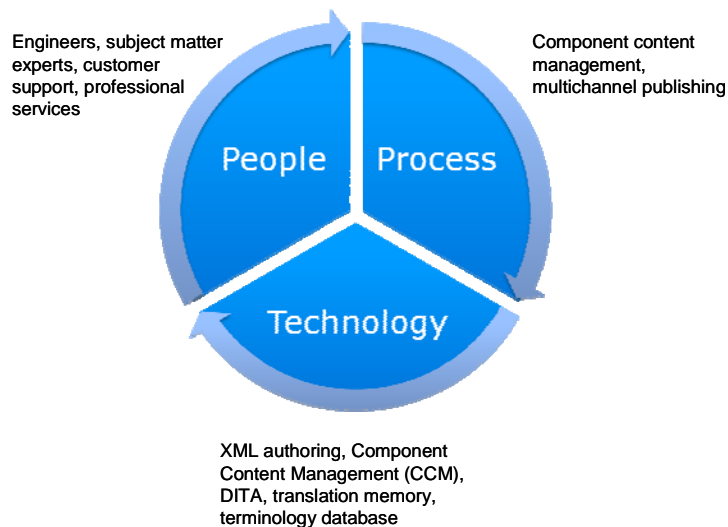
Figure 5: People, Process and Technology Elements – Product Content

Current State Snapshot: Product Content GCVC

This next section summarizes the current state of the GCVC for product content as it emerged from our research.

Due to the wide range of geographic operations and relative independence of countries and regions, survey respondents rarely possessed a complete picture of the GCVC for product content, especially the volume, number of languages, and documents being translated. At headquarters, product content was managed by technical documentation, product management, and engineering organizations, with strong input from regional product managers from sales, technical support, and marketing management.

The technology, solutions, and services used in the GCVC for product content were manifested within respondent organizations in the following ways:

GCVC Function	Business Model	Additional Characteristics
Technical Authoring	In-house licenses for authoring tools	Considered a minimal expense.
Content Management	In-house licenses	Applies to both web and document management. Manufacturers of physical products often used PDM system as a product content repository.
Translation Management	Services outsourced TMS software and tools, both insourced and outsourced	Typically, one group is assigned to company-wide translation, and is responsible for both insourced and outsourced services. Nearly every company outsourced company-wide localization and translation services to LSPs. Some, however, possessed in-house licenses for translation management tools and systems, which enabled them to take greater control of language assets. Companies had a strong interest in which technology was used and how it was deployed, requiring LSPs to report on translation memory usage, as well on project management and costing.
Multichannel Publishing	Variable	Web information published by WCMS. Documents published using creative composition tools, document publishing software, and outsourced services.

Table 3: GCVC Components for Product Content Applications

Individual components such as content or translation management had processes in place for completing key tasks and moving the content forward. There were also processes for transferring information from function to function, and for content review and approval. In many cases, it was a matrix-led process with the technical documentation group responsible for the overall process, though they rarely had

authority over other functions. This process was effective up to a point. Universally, organizations complained that they lacked the executive support to increase funding to further advance the GCVC. Executives provided only minimal support and were skeptical about investing in localization/translation operations even when a business unit cited dramatic, short-term advantages and savings.

Companies with expertise in product content developed notable competencies related to two areas: existing product processes and regulatory requirements.

- **Expertise in product-driven processes:** the majority of companies had processes and systems in place for designing, developing, manufacturing, and delivering products, referred to by the manufacturing organization as a "product development system." Thus, interoperability and interaction across other processes were closely related to the product development system. This alignment often enabled these companies to achieve Simship of the product and multilingual documentation at least for Tier 1 languages (those deemed to be highest priority.) In some cases, these companies utilized their existing Product Document Management (PDM) system as a repository instead of using a commercial document or content management system. The best practice profile on Symantec provides a good example of the advantages of product-driven alignment.

- **Expertise in regulatory compliance:** The second major advantage was deep insight into country or vertical specific regulations that mandate the use of local language. For instance, the pharmaceutical regulatory agency in Europe, EMEA, requires that a drug label (description of drug composition, adverse effects, interactions, etc.) must be provided within a European Union language within a specified number of days after the product is released in that country. Another example is Canadian government regulations, which require most commercial products, particularly consumer goods, to have product labels and instructions in both English and French.

GCVC for Brand Content

"Brand content" refers to content that describes a company and the benefits of its products to the general market to position the organization to the public. Within business enterprises, it is typically the responsibility of corporate marketing or corporate communications functions; in not-for-profits and governments, it might be community relations or office of public information. Brand content has many applications across multiple channels, including web sites. For the purposes of this study, "web content" can be read as synonymous with "brand content."

Ideally, brand content for web sites comprises different media types and can be highly interactive, delivering a personalized experience in real time. Dynamic publishing of content that is rich in metadata is a key technology underpinning since brand content often has a short shelf-life. The effect of this brand content on customer satisfaction is more easily measured than other content types, thanks to the practice of web analytics and the technologies to support it. However, localization/translation can be challenging since marketing language tends to be nuanced and colloquial. Adding to the complexity

is the popularity of combining user-generated content with predefined brand content to evolve customer experience toward engaging web audiences.

These and other characteristics of brand content have a distinct impact on the shape of this instance of the GCVC and on the people, processes and technology elements that it encompasses, as shown in Figure 6.
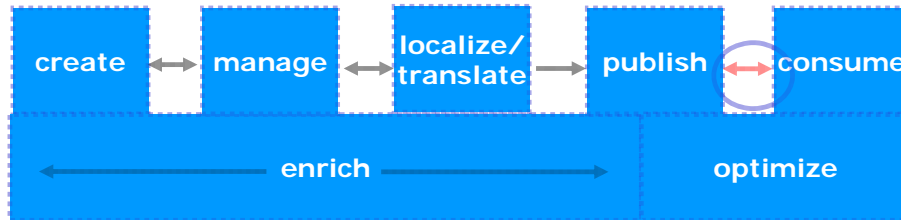
Figure 6: Global Content Value Chain: Brand Content

Compare this instance of the chain with that illustrated in Figure 4, depicting the GCVC for product content.

- **Optimize** is now further downstream, where content is published and consumed. This placement reflects growing adoption of web analytics tools which allow marketing managers and web operations teams to measure the effectiveness of content and continuously improve its performance against business goals.

- The arrow between **Publish** and **Consume** is bidirectional. This flow recognizes the rapidly growing social computing trend and represents the flow of user-generated content into the value chain from the furthest downstream point.

- The **Manage** and **Localize/Translate** boxes are switched. With web content, translation often occurs closer to the point of web publication; contrast with product content, where localization and translation is often closer to authoring processes.

Figure 7 provides an example of some of the people, process, and technology elements that are specific to brand content applications.

Marketing, brand, and product managers, web content managers and developers, site designers, web operations managers

Template-driven design, site hierarchy and metadata design, multi-variant testing

People   Process

Technology

Dynamic publishing, web analytics, digital asset management, search engine optimization, translation memory, terminology database
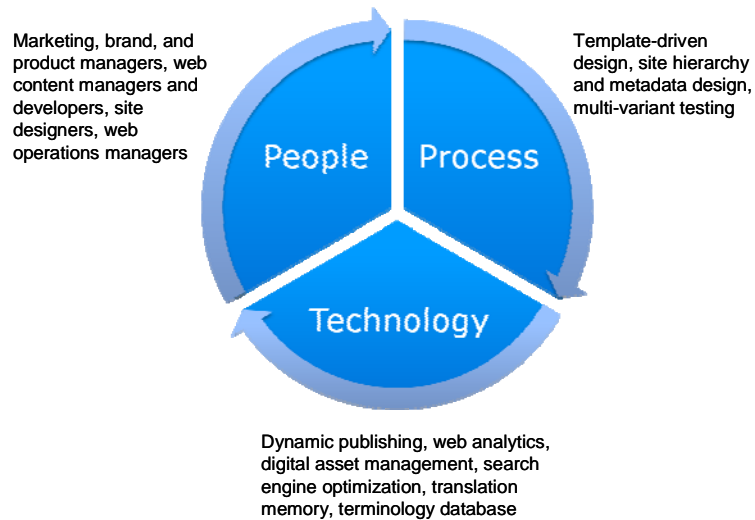
Figure 7: People, Process and Technology Components -- Brand Content

Current Snapshot: Brand Content GCVC

This next section summarizes the current state of the GCVC for brand content as it emerged from our research.

In the ideal scenario for brand content, the process for global branding is usually owned by a centralized marketing group with clear authority for content and messaging. Marketing creates the brand content (text and images), manages it, and publishes it, usually performing all functions within a web content management system. Some companies have implemented companion digital asset management systems to manage a growing volume of rich media. Again, ideally there is a single source of brand content with defined guidelines on which portions must be reused and which can be adapted for languages and locales.

The reality as revealed in our research snapshot is another story. While companies have processes in place for creation, management, localization/translation, and publishing of brand information, the line between centralized and regional authority in most firms is wobbly and constantly in flux. In the current state of the GCVC for brand content, regional operations play a proportionally larger role in content creation than they do for product content. One reason for this is that web sites are often on the front line of global expansion; one study sponsor summarized the attitude as "treating the web site as the beachhead for presence, with real business to follow." Consequently, regional resources tend to have more influence on, if not outright control over, the processes in the GCVC for brand content. They do what it takes to get the job done.

Regardless of company size (i.e., even in very large organizations), regions can opt in and out of using the content and resources of corporate marketing. Regions also create and publish their own local-language content, which they may consider most suitable and compelling for their markets. They make the final decisions on the applicability of the global brand information to their locales and often hold the budget for any required translations. Despite the existence of a formalized, centralized localization/translation operation in some organizations, the department is usually relegated to the role of an

in-house service agency, and must persuade each region of the value of their services. The tension between centralized and regional operations (and how companies are managing it) is explored in detail in the section entitled *Optimizing the Process Balance: Centralized and Regional Collaboration.* For our purposes here, it is sufficient to say that this balancing act is core to defining the current state of the GCVC for brand content.

Because brand content is fundamentally different from product content, functions in the GCVC are addressed in fundamentally different ways. The technology, solutions, and services were manifested within respondent organizations in the following ways:

GCVC Function	Business Model	Additional Characteristics
Authoring	In-house licenses	Use editor from WCMS If not WCMS, then used creative design tools or word processing applications Global branding content created by marketing
Content Management	In-house licenses	Use WCMS. For graphics and images, Digital Asset Management (DAM) system is sometimes used.
Translation Management	Services outsourced TMS software and tools, both insourced and outsourced	Translation management is generally the only standard technology that is not part of the WCMS Centralized translation management is the norm Translation memory database for approved language Terminology management system sometimes used for approved corporate terms and language equivalents
Multichannel Publishing	In-house licenses	Most publishing is web publishing, so the WCMS is the default publishing engine. Content required in other media was provided in digital form and published in-country.

Table 4: GCVC Components for Brand Content Applications

Real-World Scenarios: What's Happening Today

Our discussion with respondents on real world-practices uncovered a number of "disconnects" that cross people, process, and technology elements. A pervasive disconnect was between corporate strategies for global expansion and operational goals to include multilingual communications as part of that strategy. Although there was no mention of content management in its broadest sense or multilingual communications requirements within top-line business objectives, all organizations have active, albeit fragmented, processes for multilingual communications delivery.

These endeavors are led by "operational champions" that are dedicated to the concept of a GCVC and who act as advocates for improvement throughout the enterprise. Most operational champions cite definitive risks in not improving the quality and efficiency of a GCVC, yet lament a lack of shared understanding from senior executives – another key disconnect.

Although organizations are advancing rapidly toward global expansion, they face a broad range of challenges as a result. An overall lack of collaboration is a significant bottleneck that slows or prevents decision-making and stalls the design of an optimum balance between centralized and regional management of GCVC operations. On the other hand, organizations have a strong commitment to global customer satisfaction. Respondents have key performance indicators (KPIs) at various stages of maturity that are designed to measure and prove the value and ROI of multilingual communications investments.

This section provides results and Gilbane perspective on issues such as corporate strategies for global expansion, the role of the operational champion, and how respondents are making the business case for investments in their GCVC and in particular, multilingual communications delivery.

Multilingual Communications in Corporate Strategy

Corporate strategy typically describes how top-line business objectives will be addressed, communicated, and resourced on a regular basis. If the intent of the strategy is communicated consistently, one expects to see a clear pattern across the enterprise when employees are probed on their personal knowledge of its goals.

Our survey respondents seemed well-versed in their knowledge of their organization's strategic objectives. The following quotes represent the typical answers they provided when asked about their awareness of their company's top three to five business initiatives for 2008:

Strategy

Intent   **Action**

"Expand business operations through diversification." "Customer satisfaction." "Growth through acquisition." "Create customer advocates." "Continue growth in OEM sales." "Become more customer-centric." "Increase profit 20% year over year." "Create value that surpasses customer expectations."

Of course, our ears were tuned toward the presence of globalization-specific goals and we were not disappointed:

- "Expansion of business in Europe and Japan."
- "Finalize restructuring plan for China."
- "Simship in 22 European countries."
- "Global integration, global supply chain."
- "Increase worldwide presence"; "improve international presence"; "grow global sales presence."
- "Emerging markets development, specifically Asia Pacific."

These examples demonstrate corporate strategies have a strong focus on two of the three broad market forces that are changing the way organizations deal with their content assets:

1. **A new basis for sustainable competitive advantage.** Clearly, our respondents have received the message that customer expectations and satisfaction levels are driving top-line objectives. We believe that the dominance of customer-driven goals in our respondents' descriptions is significant and a reflection of global market dynamics – specifically, the ongoing shift from providing products and solutions to global customer experience. The fact that organizations are increasing focus on these objectives at the corporate level is positive and will certainly increase the value of a range of content technologies.

2. **The push towards multinational business.** Respondents have also clearly received the message that global expansion is an explicit corporate goal. The organization expectation for greater regional and market presence, market share, and increases in the customer base is pervasive.

And what of the third market force – the burgeoning volume of content, data, and information required to run the business? Unfortunately, neither managing content in its broadest sense nor multilingual communications delivery was ever mentioned as a top-line business objective. Given the consistent corporate focus on meeting customer expectations *and* global expansion (regardless of company size or vertical), it is difficult to understand how the objectives in corporate strategies consistently overlook and more specifically, *fail to acknowledge* information requirements.

Regardless of this conundrum, 89% of respondents believe that multilingual communications is a factor in corporate business initiatives. In essence, those "on the ground floor," responsible for one or more functions within the GCVC, automatically interpret the two patterns within corporate intent – customer expectations and global expansion – as inherently connected with multilingual communications deliverables.

Herein begins the phenomenon of a prevailing *disconnect* between corporate globalization strategies, the intent of headquarters and regional business units to meet the goals, and the tangible actions taken to produce results. In fact, disconnect quickly became a key theme during our overall data analysis. The gaps uncovered between intent and action, between executive and operational priorities, and between current versus required investments in people, process, and technology were vast.

Pinpointing the Disconnect

In addition to asking about strategic business goals, we also asked respondents if their organizations had established and communicated a globalization strategy that supports its business goals. Even though 62.5% of respondents claim their company has a globalization strategy in place, most readily admit that multilingual communications goals are ambiguous at best. Some went farther, stating that explicit focus on multilingual communications is simply "not part of the corporate plan for globalization." Most companies qualified claims to having corporate globalization strategies with comments such as "there's no *single* corporate strategy" or "we don't have an executive-led strategy." Many, while they claimed they had a corporate globalization strategy, typically relied on local or regional offices to assume responsibility for multilingual communications:

- "Strategy is departmentally-driven; executives are not aware of what we are doing."
- "Robust operation for translation management that addresses requirements on a tactical basis."
- "Very division-oriented by geography."

And what of the remaining 37.5% of respondents who openly acknowledged that their companies lacked a globalization strategy? Although this group included large companies with extensive global presence and established operations, candid responses were common:

- "No overarching strategy is in place."
- "Left up to the individual regions."
- "We talk about globalization strategy a lot, but globalization is neither well defined nor sufficiently funded."
- "We are not globally aligned."

That's not to say that the work to adapt and translate product and/or brand content according to cultural expectations is not being done. Rather, it is accomplished reactively, without a corporate-wide commitment to the concept and application of a GCVC. We believe that this is a formidable risk to the success of organizations competing in the global economy.

Enter the Operational Champion

A common observation made during industry discussion of Internet-driven opportunities is that the proliferation of the worldwide web has made the business world "flat." In other words, companies of all sizes can compete on a level playing field wherein everyone has the same access to technology and information. While our study respondents acknowledge the "flattening world" as Thomas Friedman has described it[8], they also recognize that different geographies and cultures have varying and distinct expectations. Thus, generalized information access does not equate to generalized information delivery. From this perspective, a flattening world requires far deeper levels of content relevancy, localization, and personalization than ever before. From this perspective, "one size fits all" is hardly the recipe for success in the global economy.

Most respondents have distinguished themselves as what we call operational champions. Operational champions often serve as the "glue" between two or more functional areas, working to achieve visibility or consensus for a strategic initiative through a bottom-up process. Our respondents embodied this role time and time again, striving to establish "common ground" between legendary functional and regional gulfs such as IT and a particular business unit, technical documentation and customer support, and marketing and sales. All the best practice profiles included in this report demonstrate the impact of strong operational champions.

Not surprisingly, 80% of operational champions believe in the concept of a GCVC. All are personally dedicated to improving it regardless of company size or vertical. For those who may think streamlining and interoperability at the GCVC strategy level is overwhelming, the best practice profile on IHI Danmark shows how a medium-sized division within a large company effectively leveraged technology infrastructure to strengthen its GCVC.

Once again demonstrating the gap between organization intent and action, however, respondents have tactical roles, responsibilities, and authority but are rarely endorsed or directed by C-level personnel. They reported little sense of corporate urgency from executive levels to improve processes and technology, but extreme pressure to "get the job done." Regardless, respondents have a clear perspective on how multilingual communications processes and technologies can help achieve corporate goals:

Corporate Goal	Operational Interpretation	Key Action Items
International revenue increases	Compelling value proposition in local language	Stored translations Author content centrally and regionally Software supports multiple languages

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[8] Friedman, Thomas. *The World Is Flat 3.0: A Brief History of the Twenty-first Century.* July, 2007. http://www.macmillanacademic.com/Academic/Book/BookDisplayLarge.asp?BookKey=2647823

Corporate Goal	Operational Interpretation	Key Action Items
Customer satisfaction improvements	Richer, clearer, more accurate language	Common terminology Integrated processes and workflow Author content centrally and regionally Software supports multiple languages
Successful global branding rollout	Global consistency, single brand across a larger market	Common terminology Integrated processes and workflow Single-source authoring Software supports multiple languages
Quality improvements	Greater accuracy in local language	Stored translations Common terminology Single-source authoring Multiple target languages Software supports multiple languages

Table 5: Linking Corporate Goals with
Multilingual Communications Business Drivers

Based on their expertise and perspective, 92% of respondents believe there is
"Considerable" or "Some" risk in not improving the quality and efficiency of GCVC
components.
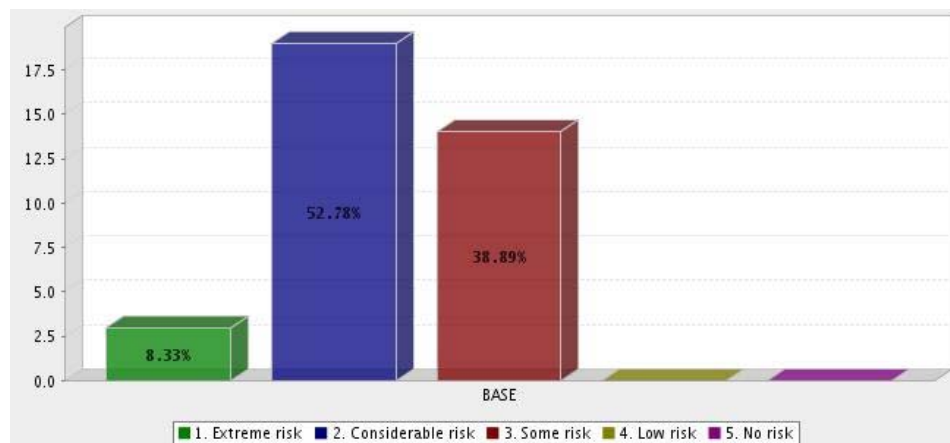
Figure 8: Respondent Perception –Risk of Not Improving the Value Chain

Making the Business Case: Focus on Business Drivers, ROI, and Measurement

Operational champions also have a distinct vision of the business drivers for
multilingual communications investments. Regardless of demographics, respondents
believed that the most important drivers focus on time to market, global brand
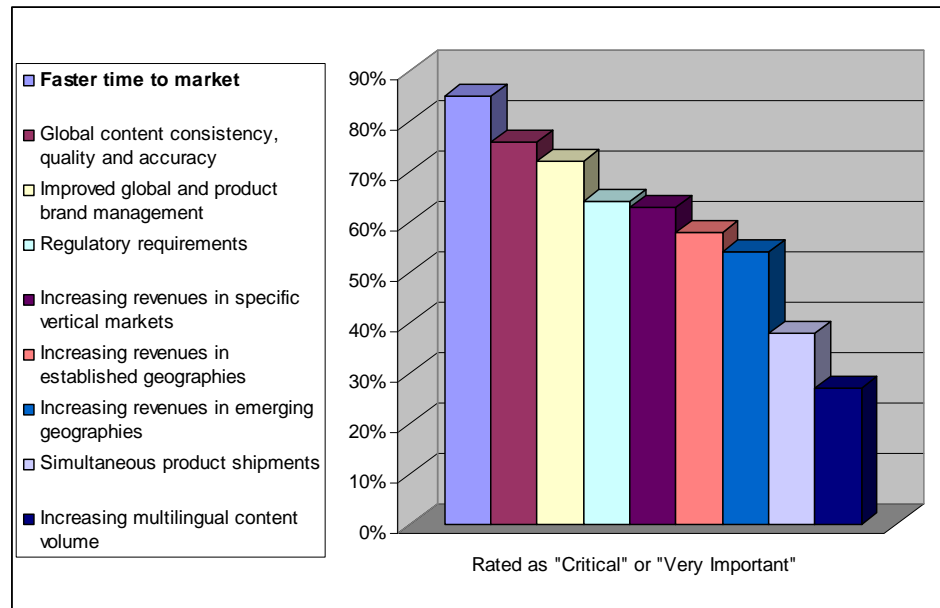management, and meeting regulatory requirements.

Legend
Faster time to market
Global content consistency, quality and accuracy
Improved global and product brand management
Regulatory requirements
Increasing revenues in specific vertical markets
Increasing revenues in established geographies
Increasing revenues in emerging geographies
Simultaneous product shipments
Increasing multilingual content volume

Rated as "Critical" or "Very Important"

Figure 9: Multilingual Communications Business Drivers

Their perspectives reflect a combination of direct and indirect interpretations of corporate strategy. In other words, it would be quite a challenge to find a C-level executive who would debate the influence of global content consistency, quality, and accuracy and with it, improving global product and brand management on improving customer satisfaction. On the other hand, these drivers *never explicitly appeared* in the list of examples respondents provided during conversations on the "top three to five business initiatives for 2008."

Even so, respondents were passionate and meticulous content and localization/translation management professionals, trained to understand the power of the word and its effect on consumers. Steady reference to global content value attributes (as summarized in Table 2) indicate their conviction and resolve that monolingual *and* multilingual content is linked to corporate success.

In some cases, respondent perspectives demonstrate their subject matter expertise based on working in particular verticals and/or regions. For example, respondents from consumer-driven manufacturing and computer software/hardware companies consistently cited the need to address compliance issues, based on explicit knowledge of the risk of not doing so. They are also highly focused on increasing revenues in specific vertical markets.

The fact that "increasing multilingual content volume" is respondents' lowest priority is actually quite logical when viewed from a content-centric interpretation of "do more with less." In other words, respondents felt strongly that blindly increasing volume was not a panacea for addressing increasing customer demand for multilingual content. Rather, doing so would be a recipe for increasing redundant content creation and information overload for customers. Respondents felt strongly that targeted multilingual communications, relevant to specific regional and customer expectations was the goal. Hence, achieving the goal equated to less content with *more* impact.

The results of our quantitative probe on business drivers align concretely with the conversation which followed it, driven by the question: "What do you believe are the greatest benefits that your customers receive from multilingual communications?" Overall, respondents cited benefits that relate directly to corporate strategy for global expansion and meeting customer expectations. Consider the following examples:

- "Customers get faster, cleaner products in their native language. Complaints and problems are reduced and fixes are quick."
- "Improved user experience that brings better contact and relations with customers."
- "Providing customers with a strong comfort level affects the buying decision and language is a part of that comfort; multilingual communications promotes good customer service, sends positive perception, and reduces steps in the buying process. Our job is to make it easier for consumers to be our customer."
- "Information in the language of choice is a barometer of a company's commitment to the international audience."
- "Personalized presence, there are major opportunities to build loyalty from localized content."

As analysts and consultants, it was easy for us to imagine these descriptions included *wholesale* within corporate strategy, mission statements, annual meetings, and business unit objectives. But according to respondents, they are woefully missing.

Multilingual Communications ROI: Measuring Cost and Value

Respondents combine a distinct vision of the business drivers for multilingual communications investments with strong ROI expectations in two categories, increased revenue and improved customer relationships.
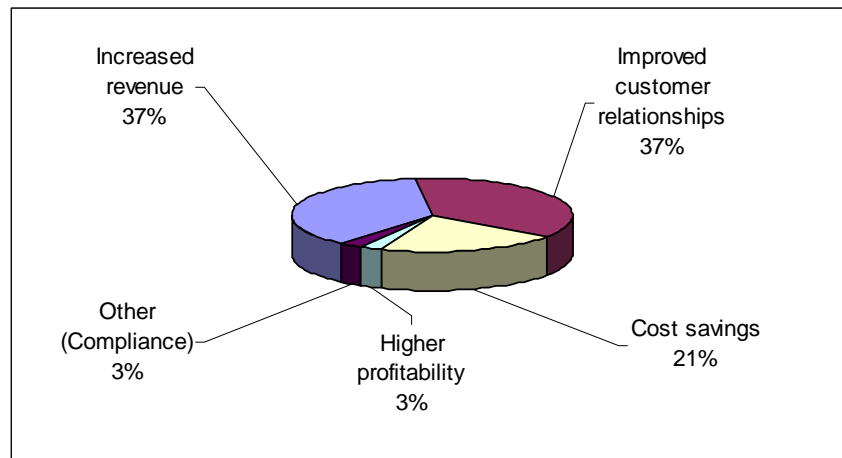

Figure 10: ROI Expectations

The good news is that both categories directly relate to corporate business goals for global expansion and meeting customer expectations. The frustrating news, as described by respondents, is that the potential to achieve multilingual communications ROI is rarely recognized and supported by a corporate-level commitment to funding

and resources. Nearly all were seriously challenged with justifying localization/translation budgets, and most struggled to demonstrate incremental cost savings. A number of operational champions cited difficulties with engaging senior executives to discuss localization/translation operations and many lamented a lack of management understanding:

- "Translation is viewed as a necessary evil. They want it completed, but have no interest in the translation process."
- Getting executive attention, except for Japan where the size of the market is a given. We also need to find ways to quantify impact and specifically show where additional leads are generated."

The counterpoint to this frustration, however, lies within another "disconnect" between intent and action. While respondents felt certain of multilingual communications ROI, they were not always sure how to tie local language content to generating leads, improving sales, and customer satisfaction. Furthermore, most admitted that it was difficult to near impossible to assess overall costs for the localization/translation component of the GCVC.

Multilingual communications for product, brand, and other content types were produced by many departments and many regions, typically with their own budgets, timelines, and requirements. Consider the following comments from two multi-billion dollar manufacturing companies:

- "We have no comprehensive understanding of the costs of multilingual communications…as it's mostly done regionally and they own and are responsible for their own budgets."
- "We don't know how much we spend on translation. There is no line item. A brochure may cost $20 K, but we don't know which part is for translation costs."

In some cases an operational champion had a clear idea of multilingual communications expenses. For example, "we spend USD 100,000 for centralized translation and USD 30,000 for each country that manages it on their own." But their knowledge became less reliable the further they ventured from their own department and they described these figures carefully: "$1 million for North American product centers." The most common answer we received was a broad range for annual costs:

- "$500,000 - $1 million"
- "$5 to $10 million on product documentation"
- "$275 to $300K"

78% of respondents expect localization and translation costs to rise over the next two to three years. 60% of these same respondents estimate the range of the cost increases to be between 5% and 20%. This further complicates the challenge to measure value in that if respondents do not know the full extent of the *current* spend in localization/translation, it is impossible to justify additional resources or technology improvements that will account for future spend.

So on the one hand, respondents were frustrated that their company management, particularly executives, had limited understanding of the resource and technology requirements to support multilingual communications processes. On the other hand, it is difficult for executive level personnel to commit to multilingual communications initiatives if they do not have the information required to justify the investment. Quite a catch-22.

From our perspective, measured value requires the definition of metrics, or in business intelligence circles, key performance indicators (KPIs). Establishing, monitoring, and reporting performance is central to good business governance. If you can't measure an activity or function, it's difficult to prove its value. Hence, proving content value – monolingual or multilingual – is no different from proving the ongoing value of most organizational operations. In fact, most tactical initiatives evolve to formal operations through this very path – understanding what should be accomplished, setting metrics for success, piloting the process to support the goal, capturing statistics and accomplishments based on measurement goals, and sharing the results.

Raising the visibility of the value of multilingual communications in terms of its impact on global business operations requires no less. Making the business case to executives requires defined metrics and ongoing measurement. What's more, the act of measurement can have a positive impact on shared understanding, collaboration, and performance – all elements of frustration among respondents. According to business consultant T.S. Monson of Wainhouse Research, "When performance is measured, performance improves. When performance is measured and reported back, the rate of performance accelerates."[9]

A number of operational champions interviewed for this study have made significant commitments to defining metrics to prove multilingual communications value and finding avenues to measure impact. Some are just starting to think about a measurement strategy, while others simply stated that "no metrics are in place." Figure 11 summarizes answers to our probe on how respondents are or would use specific metrics to measure the value of multilingual communications initiatives.

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[9] Wainhouse Research. *Speeding up Business Processes: Presence-based Mobility and Collaboration Tools for High Value Knowledge Teams*. April, 2005.

Legend:
- Customer satisfaction with content
- Increased and/or accurate brand recognition
- Content quality level; based on inaccuracies/errors
- Level of source content reuse
- Faster resolution of customer questions or problems
- Web site usage, click tracking
- Increase in translation volume, little or no budget increase
- Do not measure
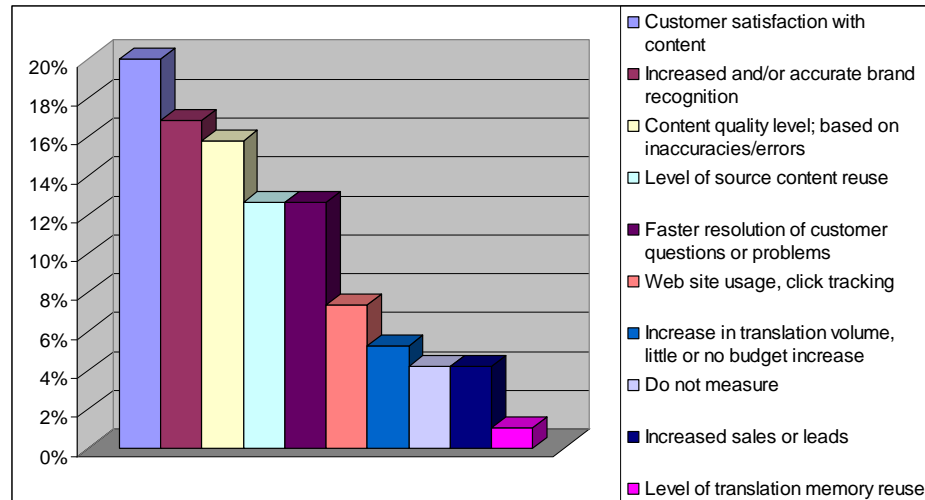- Increased sales or leads
- Level of translation memory reuse

Figure 11: Measuring Content Value

As we found in the results on multilingual communications business drivers, the top three measurement objectives are related to customer-facing benefits that can positively impact corporate goals for global expansion and customer satisfaction. They also account for the market forces described in *Market Context: Content Value in a Global Economy*, through specific tactical objectives such as content reuse (helping to manage content volume), and faster resolution of customer problems (helping to enhance customer experience).

A solid example of an operational champion with a concrete plan for ROI based on measured value came from a medical device company. With over a billion dollars in sales and over 5000 employees, this company was highly successful in their facet of life sciences, doing business on every continent and delivering product content in 10 languages. In their highly regulated industry, penetration of any geographic market was gated by mandatory delivery of product labels in the local language that provided product characteristics, adverse affects, patient instructions, and prescription guidelines.

The company currently spends about $350,000 per year on localization/translation, which they expect to rise over the next several years to $3 million. These processes are incorporated within a larger, very rigorous process of product delivery and regulatory compliance is the primary driver for multilingual communications. Having mastered the traditional measurements of content reuse, customer satisfaction with content, speed of customer issue resolution, and content inaccuracy tracking, the company moved on to measure the performance of individual linguists provided by their LSPs. In their current program, LSPs must report on metrics for all linguists, as well as on "trending," that is, rolling monthly trends of accuracy and turnaround. Moreover, each linguist is tested annually on subject matter and localization issues, and must achieve a score of 95% or greater to continue on company projects.

Conversely, a manufacturer of technology solutions for the energy industry with many times the revenue and number of employees as the medical device firm also had rigorous product development process but did little to measure the performance of

multilingual communications. With business in 17 countries and publishing product content in six to ten languages, this technology giant measures only customer satisfaction with multilingual content.

These two examples demonstrate the chasm between measuring a great deal to measuring very little. It is important to understand that reaching the former situation is possible only with a realistic set of expectations and an iterative pace for implementing a metrics and measurement program. In other words, operational champions report that getting from no executive visibility to increased visibility to an enterprise level of shared understanding takes time.

According to an operational champion featured in the Hewlett-Packard best practice profile, an optimum place to begin is where the costs flow in and expenditures flow out. In other words, building a relationship with the procurement, purchasing or accounting departments – complete with the historical reporting only these departments can provide – is a savvy first step toward shining a light on the current and perhaps redundant costs of LSPs, agencies, and outsourced contractors utilized for GCVC processes. In addition, the best practice profile on Club Car provides an example of the role metrics plays in defining GCVC success.

Key Business Challenges to the Emerging GCVC

From a review of corporate globalization strategies, company operations, the role of operational champions, and approaches to metrics and measurement, we began to get a clearer picture of how organizations are handling multilingual communications requirements and how well it is working. This exercise provided an undeniable truth: until an organization recognizes, acknowledges, and establishes a shared understanding of the key trials ahead, they will be stalled from making significant improvements to the GCVC.

In this section, we provide results and analysis on the obstacles to success as defined by our respondents, citing major bottlenecks, decision-making hurdles, and the challenges of achieving a balance between centralized and regional collaboration. The goal here is to remove the cloud cover and map the territory, so the next phase in building the GCVC can begin in earnest.

Understanding the Bottlenecks

Respondents cited a number of bottlenecks in their current GCVC chain as we defined it. Aside from their overriding frustration on the lack of corporate visibility for localization/translation processing, we asked respondents to think about the processes throughout the chain as a whole – and identify bottlenecks across authoring, content management, localization/translation, and publishing components. Figure 12 provides a summary of their responses.
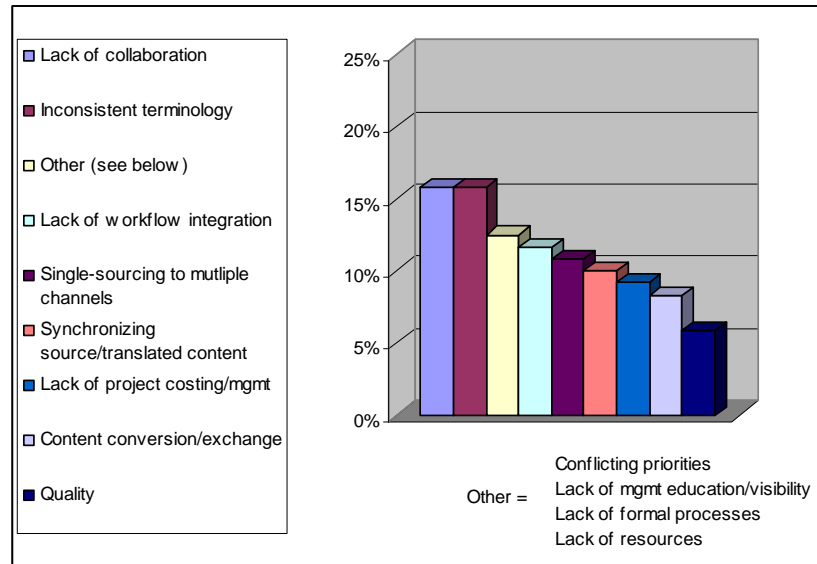
Figure 12: GCVC Process Bottlenecks

The two highest ranking bottlenecks, "lack of collaboration" and "inconsistent terminology" are directly related to operational inefficiencies which can benefit from technologies *available today*. They are not impossible issues to address; rather, they are bound only by a company's inability to understand people and process needs when implementing knowledge sharing and management technologies.

We believe the risk of inconsistent terminology is a significant risk when one considers the potential for brand *mis*management during the execution of corporate globalization strategies. Clear and consistent terminology, in both the source and target languages, is important across the complete GCVC. Because companies recognize inconsistent terminology as a major existing problem, investing in a terminology database should be a prominent part of GCVC improvement planning.

The lack of more formalized collaboration in organizations is a long-standing issue that affects all corporate initiatives, and certainly not just the bottlenecks identified in current GCVCs. So why is collaboration still bubbling up as a major bottleneck given the technology advances made over the past decade? Three words: the global economy. The expansion of internal and external worldwide corporate resources *plus* the drive toward a multinational customer base pushes the boundaries of collaboration strategies in much the same way that content volume pushes the boundaries of enterprise content management strategies.

These bottlenecks open the door for exploration into the impact that social computing can have on addressing this issue. We provide our perspective on this potential in the section entitled Looking Beyond the Research.

Another significant bottleneck, "lack of workflow integration" only exacerbates collaboration and terminology issues. Respondents clearly recognize that technologies that support the GCVC must be able to work together and at minimum, have the ability to move content back and forth through defined action items. As we discussed in the

section entitled *Pushing the Boundaries of Content Management* however, there is good news in this regard. A number of software vendors have anticipated and responded to buyer demand for increased interoperability and integration with tangible, packaged capabilities. In addition, the best practice profile on Océ provides an example of company that has addressed content and translation management integration issues.

Challenges in Decision-Making

Respondents' collective frustrations on the lack of collaboration across the GCVC compelled us to investigate how decisions on issues such as supported languages, translation processing depth, and localization/translation management are *currently* managed. If indeed there is a scarcity of teamwork and cooperation across headquarters and regions, region to region, and department to department, how have companies managed to produce multilingual communications across the range of languages cited in the *Study Demographics* section? We asked the following questions to better understand the decision-making process:

- What departments decide what languages content is translated into?
- What departments decide how much content is translated?
- What departments manage the translations, with in-house, contracted, or service provider resources?

As expected, the range of answers we received is directly dependent on the strength of operational champion(s) in place, executive initiatives made to strengthen cross-departmental and regional collaboration, and sales-driven demand. There is certainly a regulatory-driven overlay that influences decision-making for multilingual communications output. But although compliance pressures increase based on vertical industry and GCVC application (i.e. product or brand content), we did not find compliance to be a major driving force that increases collaboration or process management efficiency. This is surprising, given that our study includes input from respondents across the European Union, well-known for explicit multilingual communications requirements.

Aside from a number of respondents who simply "don't know" how decision-making occurs ("we receive translation requests and perform the work",) there were others – primarily those managing brand content output – who cited blanket decisions to "translate 100% of their content into x or y language," but usually without regard for relevancy for the intended region or culture. Consider the following as examples:

- "Whichever region is first in the market is the one that decides on multilingual content depth."
- "Whoever owns the content, i.e. marketing or engineering/tech pubs."
- "Decision-making is only within regions and not centralized or collaborative at all; authors are losing control of their content and they don't even know it."

- "Regional decision on language, depth, and budget; most outsource to local LSPs although larger markets such as China and Japan have in-house translation teams. QA is not a formal part of anyone's job."

On the other hand, respondents from mid-size to large companies had more formal commitments to multilingual communications via centralized localization/translation departments with responsibility for project management and LSP procurement. Another catch-22 however? The majority of these respondents reported that their departments were service-oriented organizations with the ability to recommend process and technologies for the GCVC, but not the ability to enforce them. Although formally established and staffed, these units continually market their capabilities to regions and other divisions, who can opt in or out of recommended processes as desired.

- "Today local organizations determine translation costs. In the future as more of the translation process is centralized, corporate communications will begin also to play a role in determining the languages, extent of translation, and budgets."

Some companies have been able to add the final ingredient necessary to support formal commitments to multilingual communications – documented, published, and supported *governance*. When this occurs, collaboration appears to rise exponentially based on the degree of interactions and coordination utilized during governance planning and design. In other words, the more workers are queried on their challenges and requirements – the more that workers feel that their voices are heard – the higher the likelihood that governance policies and procedures are actually adopted and used. If this sounds a bit like the cycle required for technology adoption, it should. Consider the descriptions of how decision-making occurs from companies that have implemented collaborative governance:

- "Our process enables regional sales groups to make the business case to a centralized headquarters localization department, who then makes the case to a centralized headquarters product group. Feedback on why or why not the business case is accepted is open to all."
- "Combined decision of the product portfolio management committee, which includes IT, product development, sales, business development management, and delivery services."

In terms of decision-making on how much content is translated and which resources and departments manage the projects that result, the same pattern applies. The higher the collaboration level, the better the result. In this case, however, better collaboration and formalized governance adds an additional positive impact on multilingual communications deliverables, specifically the ability to define *content relevance* based on a coordinated understanding of regional need. The following table summarizes this overall pattern:

Collaboration/ Governance Level	Description	Sample Departments Involved
Low	Single department based on GCVC application, i.e. brand or product	Marketing, corporate web operations, technical documentation **or** in-country regional managers.
Medium	Multiple HQ departments with regional input	Marketing + merchandising Product marketing + product managers HQ sales + regional offices eCommerce + marketing + Internet communications
High	Formal focus or decision-making group with HQ and regional representatives/input	Global product business team Product portfolio management committee Centralized globalization team Customer experience team

Table 6: Collaboration Levels in Decision-Making

All respondents report that decision-making is becoming more pressurized due to increased demand for multilingual content. Again, their perception is not necessarily to blindly provide more content but rather, more relevant content. Justifiably concerned about making process improvements to decision-making in a timely manner, respondents understand the need to increase collaboration, coordination and governance. As the following chart illustrates, those managing brand content applications appear to have the most incentive to accomplish this quickly.
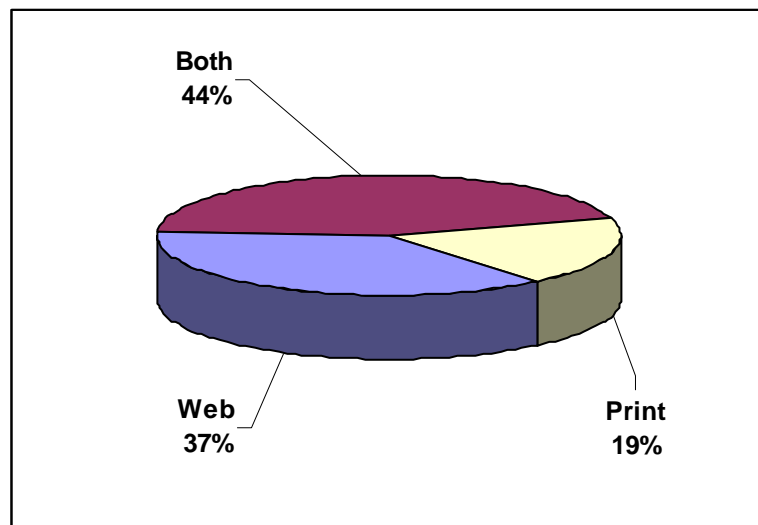

Figure 13: Channel Demand for Increased Multilingual Communications

Optimizing the Process Balance: Centralized and Regional Collaboration

Providing multilingual communications inevitably poses challenges in how to distribute operations between centralized and regional groups. A key finding in this study is that the premise of "centralized *versus* distributed" or centralized *versus* regional" has no place in a corporate globalization strategy with a formalized GCVC. A global economy requires banning the "versus" and replacing it with "and."

As is the case with any corporate initiative, internal conversation on "how to reach the goal" begins with different groups citing unique needs. Clashes over the use of technology, services, and resources grow predictably, with parties eventually walking away from negotiations, continuing business as usual.

From a content-centric perspective, much of this conundrum is due to the organic way that the GCVC evolves in each company. Groups responsible for various components emerge with their own requirements. Central groups often aim for consistency and accuracy of communication around the world in multiple languages. Brand marketing, for example, wants to maintain consistent descriptions on the company and its product on the web site, in marketing collateral, and at events such as webinars, seminars, and trade conferences. They are often concerned that too much customization and fragmentation of information will dilute and diminish the global brand, thereby reducing worldwide impact. To address these concerns, they often seek to reuse approved language whenever possible, and standardize on corporate terminology.

Regional groups, on the other hand, realize they can never be truly successful in certain geographies unless the information is presented in the local language according to culturally-driven expectations. What's more, regional operations recognize that customers from different geographies and cultures have different and distinct needs, and that the information must be adapted and tuned for success in that environment; in other words, it must be localized. The difference between translated and localized content can dramatically affect the regional reputation of the company, the number of qualified leads generated, and the length of the sales cycle. In some cases, effective localization requires entirely different messaging and content. Moreover, it is often incumbent on the region to pay for localization and translation as well (usually a sizeable share of their local budgets). For all these reasons, the regions believe they should have a strong say in what is localized, translated, and published in order to achieve a positive impact on their business.

According to our respondents, managing localization and translation management is a highly distributed process:

- The regions appeared to be most responsible for the decision to translate and localize.
- The regions teamed with central corporate resources (who had centralized translation capabilities) to gain cost advantages and reduce the burden on regional organizations.

- Translation processing was predominantly outsourced to LSPs, who according to respondents, "prefer to receive XML files" and return translated content to the service requestor.
- Translation management technologies store and reuse content, establish basic terminology, and automate the localization process resided within the LSP environment and, if within the company, within a centralized headquarters localization/translation group or within a regional office.

Who, then, manages this vast, distributed network? Who determines which languages content is translated into? Who decides what content gets translated, and when? Who pays for localization and translation? Who selects and manages the LSPs? Where does the technology reside?

Over time, conflicts between the regions and central groups eventually rise to the C-level for resolution. Unfortunately, in most organizations C-level executives consider the balance between centralized and regional operations to be a tactical issue: let the different departments and regional work out a solution on their own. Somehow, translation will always be taken care of. This C-level perspective is partially due to the fact that localization expenses are fragmented and broadly dispersed, and do not become highly visible across the corporation, at least until that fateful day when the large company wakes up to discover that it is spending millions on translation, but does not know how or why.

Most importantly, this perspective raises major questions about the allocation of resources and funding, about authority and decision-making, about global reach and local impact. Given the organic nature of GCVC growth, understanding and recognition of global product and brand communication is fragmented and inconsistent – only a minority of the armada's ships is following the same course. Without aligning the people, processes, and technology across the GCVC, companies create a huge vacuum. The excerpts below illustrate this disconnect:

- "Strategy is departmentally-driven; executives are not aware of what we are doing."
- "We are not globally aligned."
- "Most regions don't have a clear grasp of translation costs, as they are typically sales and marketing centers and don't have the resources to effectively manage this."

Letting this vacuum go unattended for too long is a recipe for disaster, as no company can afford for a region to win over a central group, or visa versa. To declare a winner is to unnecessarily sacrifice a vital part of the business, e.g., which is more valuable: sales in Germany or a global brand recognized in 40 countries?

Companies who managed to synchronize people and processes struck a balance *based on the characteristics of their corporate culture* to meet both regional and central department needs. It is critical to understand the emphasis on corporate culture in this discussion. Complex problems rarely have one single concrete solution; companies that truly define and promote a corporate culture and *understand what it will bear* are in

an optimum position to implement a centralized and regional mix of process management that best fits the culture.
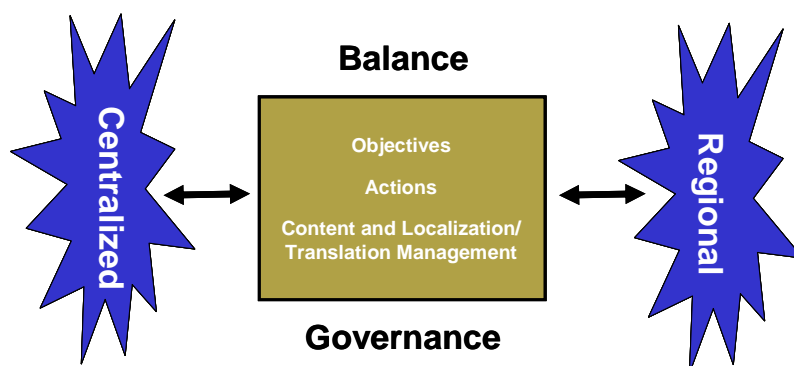

Figure 14: Centralized and Regional Process Balance

Though the mix may vary from company to company, this study found two overarching patterns that help define and reinforce a balanced centralized and regional approach to the GCVC. First, the balance is endorsed by senior management. Second, the balance incorporates guidelines and governance for the following GCVC components:

GCVC Component	Key Action Items
Creation	Central groups create content (e.g., corporate marketing, product management, or product marketing.) Regional groups create content (e.g., different value propositions, regional initiatives and events.)
Localization	Regions adapt and modify content to ensure appropriate localization. Central groups identify content that cannot be changed and must remain consistent worldwide.
Translation	Owned by both regional and central groups. Shared use of translation management and content management technology. Understanding of budgets for localization and translation.

Table 7: Patterns in Centralized and Regional Process Balance

Results that our respondents describe based on achieving the right mix of centralized and regional operations are impressive. The Pitney Bowes Software best practice profile of is a good illustration of striking a palatable and productive balance centralized and regional collaboration. In addition, consider the following descriptions as examples of success:

- "HQ centralized team makes depth and language count decisions based on revenue projections - if the target is not 10x greater than translation cost, it is usually a 'no-go'. To find the target, team looks at projected initial revenue, market growth potential, and the political/culture atmosphere of target country."

- "Centralized languages services team works with regional managers, who must coordinate with local branches to gather input on specific information requirements. If the need exists in a shared content repository, HQ pays for the base translation, but usually outsources to an LSP. If the request is for additional region-specific content or a specialized campaign for a single area, the region creates the content in the native language or outsources to a regional LSP."

- "Centralized HQ team manages translation processing with an in-house licensed translation management solution with contracted LSPs who use the system. This team then cross-charges accounts by according to originating product group or project."

Respondents who had a high comfort level with their process balance felt that their organization had taken a major step forward. As one operational champion put it, "Robust operations for translation management are in place. Regional sales and corporate product management decide what gets translated. There are international revenue goals driving everything and senior management acknowledges that localization needs to be delivered." It may not be perfect, but it works.

Evolving the GCVC: Desired State

Once the landscape for multilingual communications is apparent and the visibility of global communications requirements has spread throughout the enterprise, companies need to step forward and act on their findings. This section reports on how firms are identifying their tipping points for content globalization, outlining their plans for improving their GCVC, and reaping new success from their actions.

Finding the Tipping Point

Our research confirms that operational champions will continue to pursue an increased focus on multilingual communications within corporate strategies for global expansion. However, we also believe that there is a particular point at which an organization commits to a true realization, resourcing, and execution of an aligned GCVC. We call this the "tipping point" or "point of no return" that compels organizations to identify, formalize, fund, and holistically manage GCVC components.

This belief begs the question, "What do you believe to be the 'point of no return' or 'tipping point' at which your company determines that multilingual communications is a higher priority level?" In one sense, responses were all over the map:

Figure 15: Tipping Points for Increased Multilingual Communications Visibility

On the other hand, we noticed two patterns – one, that tipping points are either proactive or reactive (the latter posing more significant risk to corporate success,) and two, that viewed "in reverse," most tipping points can serve as strategy rather than as crisis.

For example, respondents told us that increasing sales in specific countries would be considered a top-line objective. Some noted that marketing and sales executives are

aware that localized content is a "gateway" for market entry in certain geographies such as Brazil and China. However, they also noted that it is generally the province of regional organizations to make a compelling business case for localization and translation processes in order to prove their worth. In many instances the case is based on customer dissatisfaction with a lack of product and/or brand content available in their local language even though actual products are readily available.

Other respondents referred to lists of approved country markets, especially for consumer products in mature vertical markets such as home appliances, automobiles, and over-the-counter medical devices. But they also noted that executive awareness on "how it gets done" is non-existent, and that executives preferred to view localization as "flipping a remote switch" that signals the production of product information in local language.

Not surprisingly, we found a bit of U.S.-based chauvinism in our results, demonstrated by a consistent perception from European-based respondents who stated that "there is no tipping point." In other words, although operational champions in areas outside the U.S. also report similar frustration levels regarding corporate strategy and executive sponsorship and funding, they also report less of a struggle to convince executive management of the need for multilingual communications.

Simply put, Europe's geographical structure means that citizens are quite used to hearing and having proficiency for more than 1 language. In addition, the European Union has formalized requirements for multilingual communications in all 23 official languages. In fact, the European Commission's The Directorate-General for Translation (DGT) has a permanent staff of 1,750 linguists and 600 support staff to meet citizen expectations for multilingual content. [10]

The "geographical gap" between "English as the only language" and "English as a second language" is broadly acknowledged as a barrier to creating opportunities and attracting business in specific countries. Our European respondents report that this barrier is significantly lower within their companies. Consider the following quote as an example: "In the U.S., the concept of translation value is much lower than in Europe; we are much more aggressive in accounting for multilingual requirements."

Study results also reveal specific patterns within tipping points descriptions based on other aspects of respondent demographics. For example:

- **Respondent Role**. There is a correspondence between the role of the person interviewed and the tipping point (which has a direct bearing on the globalization strategy), as illustrated by the chart below. Clearly localization operations and IT personnel gravitate more toward operations, business people toward revenue, and executive and marketing people toward customer perception.

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[10] The Gilbane Group Globalization Blog. *It Starts with One Word: Lessons from the European Union.* January 2008. http://gilbane.com/globalization/2008/01/it_starts_with_one_word.html.

▪ **Vertical.** The risk of not meeting regulatory requirements, particularly government-driven standards, becomes a tipping point in certain vertical markets. The Canadian government requires dual English-French labeling for all pre-packaged consumer goods. The pharmaceutical and medical device industry in the European Union requires product label information and data at the time of market entry.

Defining Future Expectations

The desired state – what respondents want for an optimum GCVC – is at first glance a very long wish list. Given that the concept and implementation of GCVC as strategy is still at an early stage, we expected it might be difficult for respondents to sort and prioritize a "wish list." So, we investigated their perspectives from different angles, aggregating data from the following quantitative and qualitative questions:

▪ What are the most useful technology capabilities as content moves through the GCVC? The least useful?

▪ Where are the biggest bottlenecks in your current global content value chain? (Quantitative results presented in Figure 12.)

▪ Which bottlenecks are the most critical to be addressed?

▪ What would you do differently if given a chance to start again/define a desired state?

▪ What technologies will you use in the future? Which will provide the greatest value? (Quantitative results presented in Figure 18.)

▪ What third-party services will you use in the future? Which will provide the greatest value? (Quantitative results presented in Figure 17.)

Table 9 provides a summary of the high priority wish list items that emerged from this analysis.

Function	Desired State Enhancement
Authoring	Authoring Assistance
	XML Authoring
Content Management	CM/DM Introduction or Expansion
	Digital Asset Management
	Content Analytics
Localization/ Translation	Translation Memory Introduction or Expansion
	Translation Memory Centralization
	Terminology Database Introduction or Expansion
	Specialized translation services

Table 9: Desired State "Wish List"

The following wish list items deserve more detailed discussion because of their prevalence in respondent conversations:

- **Authoring assistance** was cited by numerous product content experts. Respondents saw authoring assistance as a way to better control the quality and consistency of the content from the authoring function forward. A number of industry studies have shown that a large share of time and resources is devoted to authoring, and that much more can be done to improve authoring productivity. Authoring assistance provides three key advantages to the author:
  - Checks the availability of specific language and multilingual equivalents across a body of documentation.
  - Uses a specific language subset (e.g., controlled English) to ensure consistency and clarity across source and target languages.
  - Judiciously follows a corporate style guide when writing to increase readability across a range of documentation.
- **Terminology databases** add value to authoring, localization, and translation. Establishing the key terms for a product, service, solution, or company, and identifying the preferred equivalents in other languages has long been a part of the largest and most advanced translation operations. But today terminology has become critical for the source language alone.

  Many companies are just beginning to realize the value of a terminology database and the accompanying terminology management workflow in achieving clear corporate communication. As one person remarked, "You know you're in trouble when 40% of editing time is cleaning up terms." Gilbane strongly believes that the ideal terminology database is centrally utilized for product, brand, operational, and enterprise content applications.
- **Specialized translation services** included high value services with expertise in specific vertical markets (e.g., finance, pharmaceuticals), technology (e.g., telecommunications, networking, fluid dynamics), and translation for particular purposes (e.g., marketing, product instruction). See the section entitled *Looking Beyond the Research,* for more information on the role of LSPs in delivering such services.
- **Content analytics**, widely available for brand content applications, includes the capture of web statistics to measure impact, stickiness, and most importantly, brand performance. Today's organizations are compelled to continually assess web presence and customer experience to iteratively improve web sites and ecommerce mechanisms. Applying established multivariate and A/B testing methodologies to compare and contrast multilingual web site performance per country or region is viable today. According to many respondents, it simply needs executive endorsement and funding.
- **Greater translation memory usage** is directly related to the discussion in the section entitled *Optimizing the Process Balance: Centralized and Regional Collaboration.* In some cases, organizations are not effectively leveraging corporate translation memory (with its approved translations) for use in other

languages and communication across multiple regions. There are two roads to improvement here. One is technology-driven: guaranteeing worldwide access and use of a single source of translation memory requires integrating disparate internal and external databases. The other is people and process-driven: collaborative development of governance for the use of a "golden source" of translation memory requires a productive balance between centralized and regional requirements.

Realizing GCVC Success

As organizations gained a broad understanding of their GCVCs – where they recognized and were able to articulate their tipping points for executive visibility and in turn, future investment, as they saw the need to integrate GCVC components, and as they identified practical improvements and enhancements to their GCVC – they began to make real progress.

We found significant evidence that companies are bridging the gaps between centralized and regional operations, between executive and operational management, between proactive and reactive policies. Furthermore, respondents themselves are cautiously optimistic that they are making progress. Consider the following quotes from operational champions as examples:

- "Our centralized localization operations grew from a small group within engineering to a corporate localization service, enabling other groups to focus on core competencies."

- "Moving from a decentralized to centralized technology model has improved collaboration; we have more feedback from country managers on what works and what does not."

- "Once we centralized our web content management, we were able to prove that for USD 150K, we could build one template and replicate it 25 times for various regions within in six months. This opened everyone's eyes to value, since time to market is a big factor. We were also able to prove cost savings by having direct control over sites and eliminating some third-party agencies – we drive our content now."

Organizations are making a concerted effort to integrate the different functions and processes within the GCVC, and some saw impressive outcomes:

- "We implemented structured content authoring, automated desktop publishing, and interoperability with our content management system, translation technology, and services. The result was a savings of over $900 per document and reduction of translation time by five days."

Some respondents cited progress with global consistency and accuracy, especially in how global branding was communicated on their web sites:

- "Our pilot project produced the company's first multilingual web site."

- "The global branding program included a strong focus on multilingual requirements and produced a managed terminology database."

- "We completed a major re-haul of web presence in 2007; previous sites had more content and languages but lower quality and consistency. Redevelopment was based on identifying ten core languages and re-writing more targeted content."

Recognizing the importance of maintaining a shared knowledge base of information on content globalization, respondents had a number of ongoing initiatives to educate their global workforces. One respondent noted, "We've raised the level of awareness of content value with internal marketing campaigns, setting branding guidelines, and focusing on web templates."

Progress is being made but the optimal GCVC remains an elusive goal. It is time for organizations to take a broader, more comprehensive look at their operations for global communication. What is needed is a clear framework for GCVC success, which helps companies realize how to effectively deploy people, processes, and technology to deliver multilingual communications. What is needed is information on *Emerging Best Practices*, our next section.

Emerging Best Practices

Despite inherent challenges, a corporate commitment to improving the delivery of multilingual communications can provide amazing value to organizations. Operational champions who have managed to attract executive attention have evolved departmental projects into more streamlined operations that support product, brand, operational, and enterprise content.

According to our respondents, it has not been easy – and there is more work to be done. This study finds that companies begin to address multilingual communications seriously when they are in pain. This pain can take many forms. One organization missed its target release date for a new product because the product documentation was late. Another was forced to pull a product off the market when it discovered translation errors that misrepresented product capabilities. One country group reversed the messages of the corporate web site when they translated it into the local language. And when a corporate product group first added up translation costs from around the world, they were stunned to discover they were spending millions.

The research and best practices profiles from respondents indicate that multilingual communications initiatives tend to evolve organically. They often begin with one individual or small group that assumes responsibility for localization and translation process management. It could be a corporate group, such as marketing, IT, or product line operations or it might be a regional group in France, Japan, Germany, Brazil, or China. Based on this model, the effort usually produces tangible success in meeting a single language requirement. If the effort originates at headquarters, it is quite likely that it evolves into a formal role or group over time that manages multiple LSPs, supports many languages, and becomes the protector of quality and accuracy for corporate and/or product information.

However, the "zigzag course" approach toward advancing multilingual communications to an enterprise endeavor usually lacks speed and efficiency. Disparate groups involved with localization/translation should strive to *unify* – to bring together the roles and needs of different departments and far-flung regions to produce communication that is consistent, shares common messages, and meets a broad array of organizational requirements. As part of this endeavor, companies need to bridge the inevitable gaps between operational and executive perception, such that senior management both understands and advocates a strategy for content globalization.

We discovered several common paths toward developing a GCVC as firms traverse the people, processes and technology elements required for multilingual communications. Some are clearly emerging best practices and are documented in this section to help organizations speed the journey.

Planning

Respondents who have achieved success research and plan how they will communicate to global audiences. They acknowledge multilingual communications as an important facet of the business and recognize the GCVC as a strategy. Although enterprise-driven plans often evolve organically, tactical planning (and documenting achievements) provides a foundation for larger strategies. Universal advice from respondents on the subject of planning includes the following:

1. **Clarify the current state.** Evolving siloed content globalization efforts requires clarification and documentation on the current state of monolingual and multilingual communications processes. First, identify strengths and shortcomings. Next, identify the goals of the desired state as related to corporate globalization goals. Finally, define the people, process, and technology improvement necessary to achieve the environment's characteristics. See the section entitled Conclusion: Toward a GCVC Capability Maturity Model, for assistance in defining your current state and moving towards a rigorous, organized plan for improvement.

   For example, a respondent at a medical device company described a strategy to overhaul labeling operations for 18,000 labels, including plans for determining the volume of translations required based on vertical and geographical regulatory requirements. Identifying gaps between current and required volume, the company will document the limitations of current processes and technologies and use the discrepancy as justification for acquiring an in-house translation management system.

2. **Develop a content globalization mission statement.** As this study demonstrates, corporate initiatives almost always include geographical expansion goals to keep pace with the pressures of a global economy. However, they rarely if ever mention the need for multilingual communications as part of the strategy. Mission statements that describe multilingual communications *in the context of corporate strategies* establish shared understanding across the enterprise.

   Remember that study respondents cite increased revenue (37%) and improved customer relationships (37%) as the top ROI factors for multilingual communications investments. Citing these two metrics along with complementary business drivers will help craft a mission statement focused on top-line business objectives.

3. **Identify senior level advocates.** Respondents report that content globalization initiatives stall without two key ingredients: (a) an *operational champion* who understands the nuts and bolts of content and localization/translation management business drivers and (b) an *executive sponsor* who legitimizes and helps link these drivers to corporate goals and more importantly, to senior management objectives.

For example, a large software firm that provides manufacturing solutions had developed successful operations for localization of product documentation in eight languages, which included an in-house group for managing translation operations. At a certain point – the tipping point as this report defines it – numerous customer requests spurred a senior executive to decide that the company would simultaneously release product documentation in all eight languages. Her mandate to Simship product documentation provided the corporate localization team with funding to expand.

4. **Clarify cross-departmental and regional linkages.** There are few companies that can deny the existence of siloed departments or regions that "just do their own thing." Operating in a vacuum however falls in the "worst practice" category. Achieving success with content globalization efforts requires direct links between departmental, regional, and corporate initiatives. In many cases, there are multiple operational champions within organizations who share experiences and advice "off the record." When it comes to collaboration, it is critical to *formalize the informal,* enabling more visible conversations and knowledge-sharing to help global operations justify additional resources and expenses.

Education

Communication across a wide range of disparate communities requires education – producing multilingual communications is usually a "hidden" process. We know from operational champions that it is possible to launch an educational initiative, invite cross-departmental representatives and nobody comes. However, it is important to keep trying; when key stakeholders participate in educational efforts a shared understanding of goals is bound to emerge. Universal advice from respondents on the subject of education includes the following:

1. **Develop simple, repeatable messaging to educate the global workforce.** The entire global workforce need not understand GCVC processes at the "nuts and bolts" level. They do, however, need to understand why multilingual communications cannot be the last actions taken before marketing launches and product releases. Producing multilingual communications is much more complex than most think. Enabling others to attain a basic understanding of the GCVC concept helps align commitments across the corporation.

   For example, a common question from non-stakeholders is "Doesn't software just translate the document automatically?" The simple, repeatable answer is "no". A more detailed answer for stakeholders essential to GCVC processes provides role-based information on specialized technologies such as translation memory and terminology management, local market nuances, quality assurance, resource requirements, time requirements, and costs.

2. **"No training required" is a myth.** Many organizations think of training only for technology adoption, forgetting the people and process nuances of change management. To be successful, people need to know what they are

expected to do, how they can connect with others, and when handoffs occur from one function to another. Training programs need to be fine-tuned for various levels, but should also have common information such as definitions of content relevancy according to goals for global expansion and customer expectations in target markets.

Technology training is a given, and should cover software usage, technology standards, and IT guidelines. Employees and external users need to have a working knowledge of the tools they are expected to use. Often overlooked however, is an explanation of how workgroups and supporting environments interoperate and exchange information. This lack of information enables *avoidable* upstream issues. Technical writers, for example, may use a structured authoring tool to write product documentation. In turn, IT needs to have a clear understanding on how XML files are structured and managed to align this information with the corporate data structure. LSPs require the same information to receive or directly retrieve XML files, translate content without damaging structure, and return files to the requestor or more efficiently, directly to a content management system.

3. **Extend education to external resources and partners.** In today's world of outsourcing and complex value chains, nothing is achieved in its entirety within the company. Providing education for service providers, individual contractors, and partners ensures that third-parties understand technology architectures, operational goals, and corporate culture.

   One respondent described their LSP of choice to be an honorary member of the "corporate family," often invited to company events. Others described relationships where LSPs and contracted translators have access to internal content management, translation memory, and email systems.

4. **Education is dynamic communication.** One-way, one-time knowledge transfers have little value. As organizations provide ongoing education, individuals should contribute knowledge, raise new questions, validate the approach, and become part of the process. Education is not just a supportive measure. It's a process for validating the operation, gathering new, real-world data, ensuring alignment, improving collaboration, and increasing operational efficiency.

Formalized Processes

Evolving departmental or regional initiatives to corporate strategy requires removing ad-hoc, undocumented processes. Enterprise-level GCVC operations are formalized, shaped by corporate and regional input, and focus on consistently meeting global customer expectations. Respondents who are well on their way to formalized processes can answer the following questions. What does the customer require? Which internal and external resources are necessary to fulfill these expectations? How are projects managed and measured? Universal advice from respondents on the subject of formalized processes includes the following:

1. **Define a centralized *and* regional process balance.** A key finding in this study is that the premise of "centralized *versus* distributed" or "centralized *versus* regional" has no place in a corporate globalization strategy with a formalized GCVC. More details are in section entitled *Optimizing the Process Balance: Centralized and Regional Collaboration*. Organizations that lack collaborative view of objectives, actions, and resources for content and localization/translation management can fall prey to regional efforts that disregard corporate branding and headquarters groups that publish monolingual or multilingual content that regions find unusable. The combination of the two is a considerable risk to global expansion efforts.

2. **Define and enforce governance.** GCVC governance includes policies and business rules that guide all stakeholder organizations. It is a mechanism to ensure compliance with those rules and regulations, whether those are intrinsic or in response to external regulations and standards. Many companies in highly-regulated industries are not only required to address governance, but also to document compliance measures and submit their processes to scrutiny from public regulators.

3. **Document cross-departmental processes**. How does information go from initial creation to being published in German and Japanese? It's important to document *all* the key processes, so people know what they need to do, and how to interact and impact others across the value chain. A common point of failure in multilingual communications is broken processes, resulting in missed deadlines for product documentation, cost overruns, lost information, inconsistent terminology and data points, and compromised quality.

   An effective tactic can be culled from traditional data modeling methodologies. One large, multinational technology provider utilized a modeling tool used by IT data analysts to map processes and assign costs to functions. Another used the "blueprint" from its web content management system to document the requirements and guidelines for global and regional brand content.

4. **Establish processes for managing third-parties.** It is never too early to consider the role of external organizations within the GCVC. Organizations with long-established reseller channels have done this for decades, knowing that resistance against communicating with external organizations only hurts sales. Companies must be clear about their processes to select, engage and contract with, compensate, communicate with, and disengage third-party organizations, including LSPs.

Infrastructure

As we've discussed, an enabling infrastructure for a GCVC strategy comprises people, process, and technology. Because infrastructure investments can be capital outlays or payroll increases, the choices seem scary, or at least risky. Yet a company with an inadequate infrastructure for a GCVC strategy is little more than an empty suit — increasing risks that content is unpublished or misrepresented in global markets.

Universal advice from respondents on the subject of infrastructure includes the following:

1. **Determine optimum resource allocations.** Technology is not enough. Each GCVC component needs to be adequately funded and staffed to produce the committed results. Respondents consistently cited "not enough resources or formalized responsibilities" as a drain on efficiency, quality, content availability, and *overall motivation*.

2. **Document the current use of GCVC technologies.** If an organization does not know what technology it's using, the purpose for which it's deployed, and where it's being used internally and externally, it's near impossible to evolve the infrastructure. Documentation should include a description of where and how technology standards such as XML, DITA, TMX, and TBX are or *should be* used to guide the procurement and use of technology on a centralized and regional basis.

   Identifying technology gaps and silos is a critical exercise during this endeavor to determine where and how technology is not performing as expected. Companies acquire or choose particular technologies for their transformative power – because they will automate, streamline, or improve company processes. As discussed in the section entitled *Understanding the Bottlenecks*, respondents cite "lack of workflow integration" as a significant issue. As the GCVC evolves, applying automated integration at optimum process "crossroads" is a proven approach to demonstrable ROI.

3. **Determine next steps in technology adoption.** Figure 18 shows that operational champions are thinking about which technologies to use in the future and the value they expect to gain from implementation. If a company is evaluating technologies, we recommend that they benchmark their technology against competitors and firms in other industries with similar business models. Key areas of future consideration might be authoring assistance (connecting authoring and translation resources), machine translation (MT), and social computing (blogs, wikis, and other collaborative tools).

Metrics and Measurement

"How will a company know it has achieved success in delivering the right level of multilingual communications?" Our answer? When they can measure it. GCVC components should have clear metrics that assess the company's effectiveness in moving content through the chain. Establishing, monitoring, and reporting performance is central to good business governance. If an organization does not measure an activity or function, they'll never know if they succeeded or failed, and neither will anyone else. Universal advice from respondents on the subject of metrics and measurement includes the following:

1. **Tie multilingual communications metrics to corporate performance**. Identifying metrics that show how content globalization aids in meeting corporate goals (a) defines multilingual communications successes that are

relevant across the organization, and (b) monitors and measures corporate performance against those metrics. Reliance on operational efficiency goals *only* is not the goal. Rather, multilingual communications goals measure high value localization/translation activities, while operational efficiency metrics focus on time, cost, and volume. Both types of measurements are required to properly assess performance. Table 10 illustrates these connections.

Corporate Goals	Corporate Metrics	Multilingual Communications Metrics
Quality improvement	95% accuracy in product documentation	▪ 100% accuracy in local-language terms ▪ 100% use of approved translations
Customer satisfaction	80% product satisfaction	▪ 80% satisfaction with local-language product information ▪ Change in number of local support requests ▪ Increase/decline in regional brand approval
Increased revenue in target emerging markets	50% increase in 2008 revenue in China and India	▪ Simultaneous shipment of product documents and marketing materials in Chinese, Hindi, and American English. ▪ Gap between shipment of product documents and marketing materials in Chinese, Hindi, and American English
Increased revenue in secondary countries	20% increase in 2008 revenue for Product-A in Netherlands	▪ Increase in qualified leads for Product-A after translation of Product-A web pages and hardcopy collateral into Dutch

Table 10: Measured Value for Multilingual Communications

2. **Track operational efficiency across the GCVC.** Efficient localization/translation has always been dependent on globally-dispersed knowledge workers. The prevalence of global workforces across many other enterprise operations, including GCVC components, exponentially increases the risk of inefficiencies whenever there is an increase in the volume of translation or the number of languages.

As we discussed in the section entitled *Multilingual Communications ROI: Measuring Cost and Value*, establishing, monitoring, and reporting performance is central to good business governance. Strong translation management solutions include reporting capabilities on job completion, turnaround time, and number of words processed. Although many companies outsource actual translation work to one or more regional LSPs, they have defined a centralized resource to track and manage project costs and roll them up into total costs. Other companies have begun tracking external resources for speed, accuracy, and subject-matter expertise.

3. **Provide regular reporting on performance.** If organizations truly intend to establish and unify the GCVC, consistent communications on the state of multilingual communications is essential. Monthly or quarterly reporting on progress is a proven method; adding value to quantitative reporting with a "business implications" that clarifies the impact of performance is even better.

Looking Beyond the Research

Gilbane's goal for this study is to provide new information and insight into what companies are doing today to address existing, emerging, and evolving business needs for multilingual communications. The research supporting the study revealed early indications of issues that are on the horizon or off in the future (which is not-too-distant, given the pace of change). We combined these insights with observations drawn from Gilbane's work as industry analysts and consultants to close the report with a look forward.

In simplest terms (and with a nod to the title of the study), how will companies go about optimizing their GCVCs once they are established as strategy? This section focuses on the elements of people, process, and technology change that we believe will be core to GCVC optimization.

People: Raising the Visibility of Multilingual Communications

As discussed throughout this report, a major challenge facing global companies as they struggle to align multilingual content strategies with global business goals is the disconnect between top-level management and the departments and individuals who do the real work. Capturing the attention of executives and securing their sponsorship are essential ingredients for success in every enterprise case study that Gilbane has researched – ever, not just for this study. Making the case for investment in people, process, and technology supporting the GCVC is no exception.

Departmental functions within the domains of product content and brand content are mapped within two circles in Figure 16. If we overlap them, we can identify the functional areas that play in both domains; in addition to C-level executives, the group includes operations, IT, sales, and marketing.
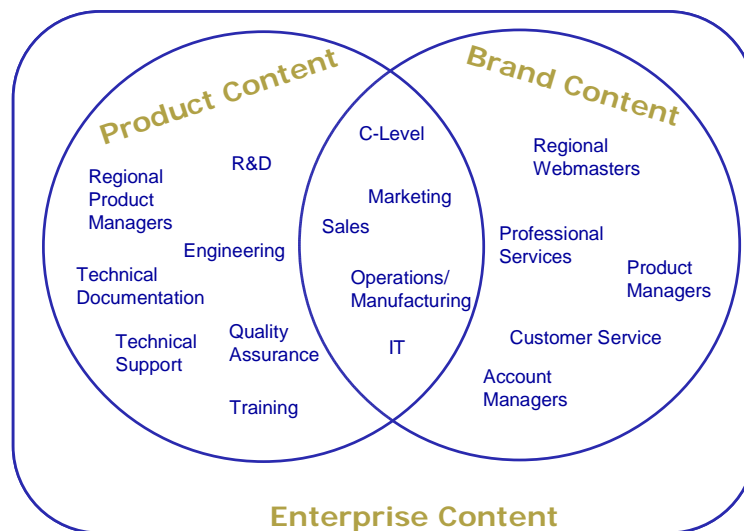

Figure 16: Domain Functions and Overlap

This simple exercise provides insight into one possible path for raising the profile of multilingual communications within the organization. With their feet in both domains, these managers will have cross-functional program and product responsibilities that relate directly to key global business initiatives such as increasing multinational revenues, satisfying customers, reducing operating costs, and mitigating compliance risk. They are likely candidates for executive sponsors and operational champions, especially if their roles are tied to tipping points or areas of exposure.

Process: Increasing Content Value through Quality at the Source

Authoring is a large share of the cost and resources of any multilingual content environment and translation costs grow incrementally each time a new piece of content is introduced or a new language is approved. For that reason – not to mention time-to-market – fusing quality and translation is a significant component of the formula for success in multilingual communications. Many respondents discussed new measures they're taking to bring together authoring and translation processes.

As we look to the future, Gilbane recommends that companies carefully review the portfolio of technology innovations in this area, as well as the appropriate mix of these solutions to produce the desired results. In considering these technologies, the intent is to increase the level of quality at the source – when the content is being written, and, thereby enable the rapid and effective flow of content throughout the GCVC. The end result is to increase the writer's intelligence and effectiveness in addressing multilingual audiences.

Technology	Function	Need Addressed
Controlled Language	A simplified version of a language with restricted vocabulary and grammar.	Produces text that can be translated more quickly and easily, and prevents readability problems due to colloquial or non-standard vocabulary.
Authoring Assistance	Software connecting authoring with translation that prompts for localization-ready content, implements corporate style guidelines, and provides grammatical guidelines by language.	Enables authors to determine the availability of particular content in already in translation, to write specifically for translation, and adhere to corporate style and grammar rules.
Terminology Management	A database of terms and contextual information relating to those terms, which shows the equivalents from one language to another.	Ensures consistency and quality of communication from the source through target languages.

Technology	Function	Need Addressed
Integration of Authoring and Translation Management	Integration code that enables files to easily move back and forth between the authoring programs/formats and the translation management programs/formats	Much has been discussed about the integration between the CMS and translation management system. But in a best case scenario, authors will have ready access to language assets to improve source quality.

Innovation through Value-Added Services

One pervasive theme in our research was the powerful need for higher value services to support a GCVC strategy. The chart below shows the eight services that respondents indicated as offering value.
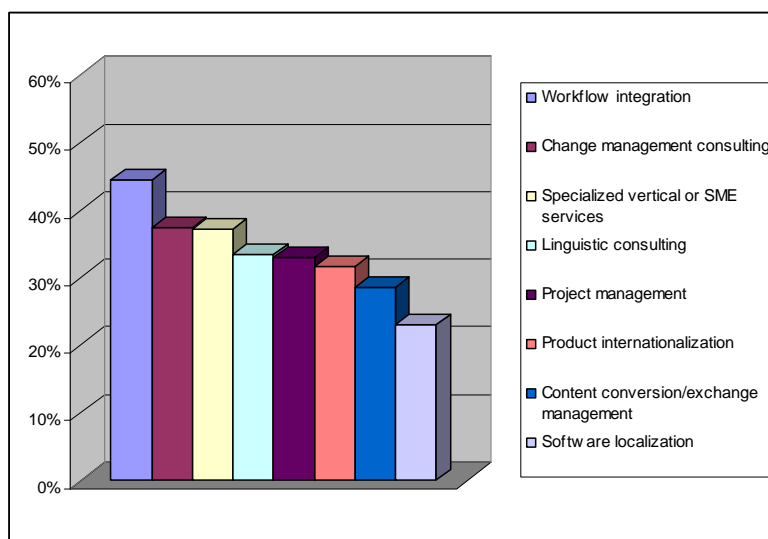
Figure 17: Value Perceptions on Third-Party Services

The Language Services Provider (LSP) appears to be uniquely positioned to assist organizations with these services. The bottom five are services that LSPs consider part of their bread-and-butter or staple offerings:

- **Linguistic consulting** is the provision of specialty services involved in localization/translation such as cultural consulting, global brand communication, establishment of a terminology database, and management of multiple translation memories.
- **Project management** is a common service provided by LSPs, typically for managing translators for delivery of content under tight deadlines within multiple languages.
- **Product internationalization** is preparing products, particularly software, for use in particular languages, such as support and display of the Arabic character set.

- **Content conversion/exchange management** entails converting files from one format to another to perform particular functions, such as converting a Microsoft Word file into XML to permit the use of translation memory. LSPs routinely receive information from many disparate sources, including photocopies or handwritten documents; convert the information into an XML format; run the data through translation memory and perform any incremental translation; and then convert back into the source format for the customer. It is important to note, however, that current versus future requests for content conversion/exchange management are essentially flat. There is no indication of increasing demand. As is the case with most capabilities or services that commoditize over time, content exchange and conversion is ripe for further automation rather than as a long-term value-added service.
- **Software localization** is translating screens, dialogue boxes, and messages within programs from one language to another.

The top three requested services represent opportunities for service vendors, particularly LSPs, to increase their value to an organization's entire GCVC rather than one specific component.

- **Workflow integration**, the most requested item, involves the alignment and interoperability of various processes including translation management, content management, authoring, and publishing. From our perspective, the prevalence of this request reflects the complexity of workflow in today's environments and the perceived difficulties in achieving a better solution.

    On the other hand, this situation is rapidly changing for the better. Given recent advancements in technology that facilitate integration (including improved file exchange between CMS and TMS solutions), as well as the growing adoption of standards (including the translation standards TMX and TBX), we expect that integrated workflows will become increasingly easier. Ease of use will cause a drop in demand, either as integrations are incorporated within industry leading products, or as standards become so widely adopted that product interoperability is no longer an important challenge. For example, some CMS and TMS applications today ship with integration code. There are also third-party connector packages available that simplify file and process integration, and even leverage the several software packages to do collective reporting. Eventually, we expect that the standardization of file integration and workflows will enable the interconnection between different functions to be fully automated. While demand lasts, LSPs are in a good position to provide guidance on workflow integration as well as standards adoption, as they routinely integrate authoring tools, content management, and localization/translation management systems.
- **Change management** appears on the heels of workflow integration and is a strong horizontal request that is specific to addressing organizational culture changes, developing governance, and maximizing user adoption of new technologies. Gilbane believes that LSPs are well-positioned to become key change agents in guiding the development of emerging GCVCs.

- **Specialized vertical or subject matter expert (SME) services** are a significant opportunity for services providers to achieve a sustainable business model and establish competitive advantage. According to our survey, the demand for specialized vertical or SME services will nearly double over the coming year, with expected use growing from 23% to 41%. A few content management vendors have specialized in particular vertical markets, and some systems integrators have stepped up to provide special vertical or SME services. LSPs, however, have routinely built linguistic and translation practices around vertical market requirements, such as finance, high technology, and healthcare. One medical device company told us about an LSP/technology vendor that provided QA services for the medical device market. Many of the respondents were reluctant to change LSPs due familiarity and expertise in particular markets.

The top three requested services begs the question, "Why are LSPs not viewed today as GCVC change agents, providing change management consulting, delivering specialized vertical and SME services, and actively providing other specialized services?" The answer is bound to LSP history and legacy: the marketplace, we're sorry to say, sometimes views LSPs as global janitors, relegated to cleaning up content for global audiences. Translation *is* one of the world's oldest professions and has long been commoditized, where customers are used to paying by the word for services provided over a few days or weeks.

Localization and translation managers inside the organization are often rated solely on operational efficiency, and are recognized neither for the high value of innovative solutions, nor for the expertise required to successfully implement them. With new product introductions, for example, LSPs are engaged after the products are developed, and typically after the operation manuals and marketing collateral is written in the source language.

On the other hand, LSPs have extensive language processing knowledge, but do not often market themselves as untapped strategic resources. Moreover, the traditional LSP business model has been to highlight cost savings and turnaround, which accentuates the dilemma. In the tactical rush of this environment, high value services can easily be overlooked, such as quality assurance expertise, incorporating machine translation with translation memory, and cultural consulting and training.

Gilbane's view is that the trend toward greater involvement of executives and business managers in the globalization process will drive new demand for high-value services. As executives recognize the value of the integrated GCVC and oversee the introduction of new technologies and services that impact the value chain, they will seek consulting firms, most likely LSPs that can assist them with these challenges. For LSPs who remain boxed in and are skeptical that customers will consider them for specialized vertical or SME services, there may be opportunities to team with high profile, business consulting firms to provide domain expertise and technical know-how in corporate globalization.

Multilingual Communications as a Business Imperative

In any case, we suspect that global enterprises will seek and secure the vertical market/SME and change management expertise they need. We expect that most organizations will gravitate toward vendors, particularly LSPs that are savvy purveyors of global change via the GCVC, consistently offering and delivering value-added services such as launching global brands, improving the quality of customer experiences, and automating GCVC infrastructures and processes.

Technology: Traction (and Respect) for Machine Translation

Machine translation has traditionally been the target of many jokes in the globalization industry. It's true that early versions of the technology, dating back to the 1950's, produced unpredictable results that made adoption risky. But with technology advancements (including computing power), machine translation is now not only viable, but also potentially game-changing.

Adoption speaks directly to the third external market factor putting pressure on the production of multilingual business communications: the exploding volume of content, data, and information that is required to run a global business. This quote from a post on Gilbane's globalization blog sums up the opportunity succinctly.

"The fact is, there is not enough time – and definitely not enough money – to perform human translation on even a fraction of the information that is being produced. So, if MT helps people to become aware of your message, it certainly should be considered as a tool, even if the result is not perfect. Useful is often enough."[11]

Our respondents indicated that they intended to increase their use of machine translation and interestingly, also identified this as one of the top three valuable technologies for the future.
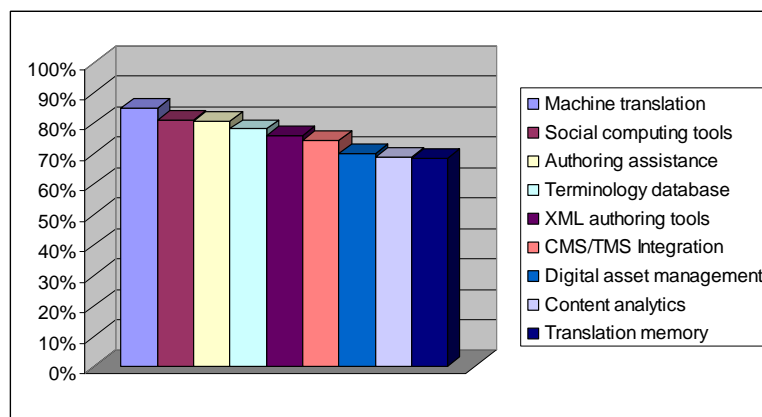

Figure 18: Expected Value of GCVC Technologies

[11]The Gilbane Group Globalization Blog. *Fully Automatic Useful Translation.* January 2007. http://gilbane.com/globalization/2007/01/fully_automatic_useful_transla.html

Applications driving increased interest and adoption run the gamut from gisting—getting the gist of language through automated translation—to Google's use of internally-developed machine translation to handle sophisticated multilingual searches.[12] As the predictability and viability of the technology increases, its GCVC role will expand. One of our study sponsors remarked that companies tend to call for automated translation only when they are in crisis mode. This is changing, however, and today many leading-edge global companies consider machine translation an important—and essential—augmentation to human capabilities. The best practice profile on Symantec demonstrates how machine translation is incorporated within the larger localization/translation infrastructure.

Technology: Social Computing and Enterprise Content

Enterprise practices for multilingual business communications are not immune to the impact that social computing technologies are having across whole business ecosystems. In fact, the characterization of the GCVC as a network makes multilingual business processes ripe for innovation through the application of technologies such as blogs, wikis, shared workspaces, collaboration tools, and techniques associated with cloud computing and crowd-sourcing.

The need for such innovation is certainly evident. As reported in Figure 12, a lack of collaboration is perceived as the most significant obstacle towards implementation of a GCVC strategy. Participants across the chain need and want to communicate and work together more effectively. Social computing tools are obvious remedies for these pain points. Their widespread availability and breathtaking rate of adoption make their impact on GCVC deployments inevitable. Respondents agree, as demonstrated in Figure 18: Expected Value of GCVC Technologies.

At a Gilbane conference in late 2007, a senior manager from a high-tech device manufacturer described how engineers within the company's global workforce had casually begun to translate technical content and review translations performed by internal and external resources. The development of this ad hoc group confirmed that for some content and for some audiences, less-than-100% translations could be "good enough." The development of a trusted network and the availability of collaboration technology enabled this organization to leverage resources to solve a tangible problem.

This kind of organic participation is an early indication of what is possible with social computing techniques. The proliferation of experiments and useful communities of practice will only accelerate as younger people come into professions like engineering and web marketing. They are bringing expectations that their work life functions like their personal life, with community sites like MySpace, Facebook, Orkut, and Bebo providing their frame of reference for how business relationships should work. Vendors of technologies and services should take note of this expectation and consider ways to support web-based collaboration in their product and services strategies.

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[12] http://www.dailycal.org/article/21529/google_researcher_speaks_on_company_s_latest_innov

Conclusion: Toward a GCVC Capability Maturity Model

In this study, we provide a definition of the Global Content Value Chain—an overarching strategy for delivering multilingual communications that aligns with global business goals. We validated the concept of the GCVC with survey respondents, who recognized its potential positive impact on their organizations. 80% of operational champions believe in the concept of a GCVC. 92% believe there is "Considerable" or "Some" risk in not improving the quality and efficiency of its components. We examined obstacles to GCVC deployment. We characterized the desired state for GCVC practices and the processes under its umbrella. We distilled best practices that are emerging within the world's leading producers of multilingual content. We captured some of their stories in profiles detailing their challenges and successes.

We hope that we have made you a believer in the tremendous benefits that are available to organizations who formalize their approaches to multilingual content and consciously manage people, processes, and technology so that they add value to multilingual content. If we have accomplished this last goal, then you will want to know how to begin a rigorous, organized plan for bringing the GCVC to life within your organization, or expanding its reach if you already have a CGVC in place.

Gilbane believes that the Capability Maturity Model® (CMM) developed at the Software Engineering Institute at Carnegie Mellon University (first released in 1986) provides a proven framework for GCVC initiatives. The CMM model was initially developed to help companies understand how to improve the application of software technologies over time. The CMM has since been generalized as "a process improvement model to help organizations identify best practices and enhance process maturity." It has been widely adopted across many industries and many business and technology applications. CMM adopters include Accenture, Boeing, Nokia, Wipro, EDS, General Motors, TRW, Motorola, NEC, and Hitachi.

The CMM as outlined by the SEI breaks processes into five levels of sequential development, defining each organizational state in terms of competencies, capabilities, and best practices:

- *Initial/Ad Hoc*: Process is unpredictable, poorly controlled, reactive, and typically undocumented.
- *Repeatable:* Process is characterized for projects. Some processes are repeatable, possibly with consistent results.
- *Defined:* Process is characterized for the organization, is proactive, and contains sets of defined and documented standard processes.
- *Managed:* Process is measured and controlled, and can be adjusted and adapted to particular projects.
- *Optimized:* Process is focused on continued improvement through both incremental and innovative technological changes.

As a process improvement model, the CMM is well suited to charting and managing a various aspects of corporate operations. With some adjustment, it can be applied to the GCVC for the same purpose. Therefore, Gilbane proposes a GCVC Capability Maturity Model. The GCVC CMM builds upon SEI's CMM, adding value to each stage based on content-driven objectives, and in particular, multilingual communications processes. The chart below describes the GCVC CMM, and how it corresponds with the SEI CMM.

Aligned

Balanced process achieved between central and regional operations with enterprise-wide governance, measurement, and continuous improvement based on annual corporate globalization strategies.

Collaborative

Streamlined content globalization processes in place based on performance metrics and shared language assets between headquarters and regional levels.

Operational

Functional content globalization processes are in place, but siloed within departments and regions with little to no collaboration.

Accepted

Repeatable content globalization processes are developed according to project and content application.

Aware

Reactive headquarters and regional approach to content globalization requirements.

| Initial/Ad-hoc | Repeatable | Defined | Managed | Optimized |

Labels from the Capability Maturity Model®, Software Engineering Institute at Carnegie Mellon University

Figure 19: GCVC Capability Maturity Model

The GCVC Capability Maturity Model is a mechanism for evaluating your company's current situation, deciding where you need to go to align with top-line business objectives, and understanding which factors are most critical to moving to that new state. This approach will enable you to apply rigor to improving the GCVC and deriving incremental value from each investment. The model can also serve as the framework for driving the conversation with other organizational stakeholders. As documented in best practices, education up, down, and across your organization is critical to success. You can begin the dialog by collaborating on the definition of a GCVC Capability Maturity Model for your organization. The outcome of this exercise will be shared understanding, agreement on a plan for moving forward, and the foundations for governance.

As we mentioned in the executive summary, this study is the first of a series of reports comprising a multi-year research agenda within Gilbane's content globalization practice. The GCVC Capability Maturity Model will feature prominently in Gilbane's ongoing content globalization research. Our intention is to provide more details on each stage of the model, dig deeper into best practices, and share the knowledge that today's globalization pioneers are gathering along the way.

Best Practices Profiles

Generalizations and analysis never tell the whole story. For this report we interviewed 40 different companies to learn how they addressed the challenges of multilingual communications, and from this effort gleaned the industry's best practices. In this final section, we look at individual companies, noting best practices in large and medium sized firms, for product and brand content, with organizations that were relatively new to content globalization or carried long histories in localization and translation.

Two medium sized firms, *International Health Insurance Danmark*, the world's largest provider of international health insurance for individuals, and *Powerwave*, a manufacturer of wireless communication products, meet the challenge of global brand success in large, foreign language markets – Latin America and China respectively.

Club Car, the utility vehicle division of Ingersoll Rand, and *Pitney Bowes Software*, a product group with location intelligence software, have developed sophisticated product communication infrastructures and processes for doing business in a large number of countries, and publishing content into 17 and 20 languages. Each company has developed a successful balance between centralized and regional communication.

Printing solution giant *Océ* has streamlined and increased the consistency of its global brand communication through technology innovation. Océ integrated its web content management with translation management, and leveraged authoring assistance technology to ensure multilingual consistency.

Symantec, a global leader in infrastructure software, has built on a long history in localization to achieve new levels of operational efficiency for technical product documentation. Its innovations in source language control, controlled authoring, machine translation, and translation memory reuse are well known throughout the industry.

Hewlett-Packard, one of the world's largest IT solution companies, has become a poster child in multilingual communications for its success in both the product and brand communication. Hewlett-Packard has a mature, well-developed Global Content Value Chain (GCVC) that translates over 30 million words to serve customers in 170 countries.

Club Car

Company Description

Club Car is the largest manufacturer of golf cars and utility vehicles in the world, with 1,200 employees and hundreds of millions in revenue, selling to a variety of markets, including education, outdoor recreation, government, and hospitality. Club Car has sustained consistent growth, with an increasing amount of that growth occurring internationally. Its worldwide distribution network includes over 600 distributor, dealer, and branch locations. Club Car is a product group within Ingersoll Rand, a $17 billion manufacturing giant that generates a significant portion of their revenues from outside the U.S.

Focus on Product Content

Club Car's golf cars are renown throughout the industry for their aluminum frames, which are more durable than steel frames. As the company's global golf business expands, their market share has increased significantly. They are expanding rapidly in non-golf markets as well with utility, hospitality, and off-road vehicles accounting for a significant portion of their sales world-wide. New product innovation is core to the company. A growing share of their business involves new products that meet new commercial and consumer needs and leverage emerging electric vehicle technologies.

Because Club Car's markets span the globe, demand is high for product documentation in many languages. The company publishes multilingual technical documentation, sales brochures, marketing collateral, Powerpoint presentations, meeting minutes, and many other forms of global communication.

Challenges

During the past two decades, the rapid development of new products and growing international sales have strained the company's ability to adequately create, manage, and distribute multilingual product documentation. Despite Club Car's belief in the Global Content Value Chain (GCVC) concept, their internal processes could not keep pace with the company's international product expansion. The technical publications group needed to deliver on-time, high-quality product information in 17 languages but did not receive a corresponding increase in budget or resources.

The Solution

The need to scale multilingual communications output with little increase in budget or resources required Club Car to devise an innovative strategy. Engineering change from the ground up, the technical publications group incorporated GCVC processes into the larger system of product design, development, and manufacturing. For example, the team:

- Moved a large share of the technical writing to an XML-based structured authoring program;
- Integrated their content management system-- already in use for managing engineering development--with their design software and authoring solution; and
- Adopted and integrated an XML-based publishing solution with both authoring and content management.

Club Car selected Sajan, a leading on-demand language translation service and technology provider, to fulfill the need for integrated translation management. Sajan provided new technologies and user-friendly services. They readily accepted XML files, were easy to use with the other GCVC components, and provided a growth path for evolving the value chain. In coordinating the introduction of these technologies, they streamlined the decision-making process to ensure an optimum balance between centralized and regional action.

Decision Point	Decision Maker
Language selection on individual projects	Multiple departments
Level of translation volume	Regions
Managing localization services	Central translation group

Results

Club Car achieved impressive results during the automation of its GCVC, reaching the following milestones within one year:

- Managed 430,000 English words that were translated into multiple languages;
- Produced over 120 complete sets of manuals available in up to 17 languages;
- Limited the translation budget to less than $300,000;
- Saved over $1200 per document by eliminating desktop publishing expense; and
- Reduced the turnaround for translation services by five days.

Club Car asserts that the latest platform of technology, services, and processes will scale easily to accommodate a growing volume of translations. Jeff Kennedy, manager of

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Best Practices Highlights

✓ Integration between GCVC components

✓ Incorporation of GCVC within PDM/PLM system

✓ Balance of centralized and regional operations

✓ Shared language assets

✓ XML leverage

Club Car's Technical Publications Department, stated, "Automating the complete desktop publishing process was a major milestone for Club Car in 2007."

In the coming year, Club Car plans to enhance the success of their evolving GCVC by introducing a controlled language solution. This solution will connect authoring with approved translations, standardized terminology, and a corporate style guide.

Gilbane Group Perspective

Ingersoll Rand Club Car has significantly matured their global communication. What truly distinguishes them is the extent to which they have automated the value chain. Club Car deliberately chose to follow industry authoring standards. By integrating GCVC processes, the company achieved a single streamlined and consistent workflow. Through the efforts of their technical publications staff, they arrived at a solution that leverages common language assets across all technical documentation. Results include faster time to market, improved quality, and decreased translation costs. These improvements will undoubtedly support Club Car's business expansion plans.

Hewlett-Packard

Company Description

Founded in 1939, Hewlett-Packard (HP) is a among the world's largest IT
companies, focused on simplifying technology experiences for all its
customers – from individual consumers to the largest businesses. The
company's offerings span IT infrastructure, software, services, business
and personal computing, and imaging and printing. For the four fiscal quarters ended
April 30, 2008, HP revenue totaled $110.4 billion.

HP serves over one billion customers in 170 countries on six continents. The company
strives to make it as easy as possible for these customers to do business with HP. The
company's globalization strategy is specifically designed to provide HP customers with
the right information, at the right time and in the right way. These goals include a
strong focus on multilingual communications to convey a single, consistent corporate
voice that adapts to global customer expectations.

Focus on Product and Brand Content

During a 2004 Gilbane conference, HP's Vice President for Content and Product Data
Management stated that 90% of HP customers buy based on content, not on touching
the product. This fact underscores the ongoing pressure HP faces to continuously scale
Global Content Value Chain (GCVC) operations to accommodate product and brand
content lifecycles.

Two core beliefs define HP's holistic approach to global content management and in
turn, to global customer experience management. One, that content (including images
and rich media) is a core corporate asset to be shared and reused regardless of its final
destination, i.e., technical documentation, marketing collateral, or web and print
product catalogs. And two, that localization and translation processes are of equal
priority and value within content authoring, management, and delivery.

An HP operational champion since 1998, Translation and Localization (T&L) Manager
Alison Toon is resolute in the execution of these beliefs. Her role rapidly evolved from a
part-time assignment to address T&L issues to a full-time role, managing a team that
spearheads new organizational processes and roles such as full-time terminologists.

Challenges

In 1998, content globalization processes at HP were highly decentralized; business
units and regional divisions worked on their own to localize and translate product and
brand content for local target audiences. At the same time, HP was relying more heavily
on web sites as a primary means of communication with customers and partners. As
Toon remembers, "In our global operating environment, the Internet became a primary
interface between customer and vendor. And the customer expected to see consistent
and timely information regardless of how and where it was published."

As a part-time role morphed into a formal T&L department focused initially on support web sites, Toon was challenged to keep up with increasing content and translation management demands. Translation was inefficient due to redundancies. Two factors were in play. First, some regional translation agencies were not using translation memory, starting from scratch each time a new translation cycle was required. Second, there was no leverage across the isolated translation memories that did exist.

HP's business challenge was not uncommon, but exponentially larger than most due to the company's size and depth of global presence. Enabling corporate business units and regions to take advantage of enterprise technology and services, without preventing local innovation and effectiveness, was paramount.

The Solution

By 2001, HP was managing brand content in up to eight languages through an enterprise translation management system. The T&L department had established a translation memory database with a throughput of an estimated 400,000 words.

By 2004, the number of words translated per year had grown to 30 million. During these pivotal three years, the T&L team worked diligently to raise corporate awareness of their efforts. Like all operational champions, Toon often struggled to garner executive visibility, including commitments to budget and resources. Education, a critical component for transforming globalization strategy from intent to action, played a key role in the team's strategy. Innovative (and persuasive!) tactics included:

> **Best Practice Highlights**
>
> ✓ Operational champion
> ✓ Long-term strategy and commitment with short-term milestones
> ✓ Unified technology architecture for product and brand content
> ✓ Balance of centralized and regional operations; strong focus on collaboration
> ✓ Corporate visibility into T&L activities and cost savings.

- Collaborating with HP's procurement unit, who provided a compelling history of T&L-related expenses formerly "invisible" to an executive audience.
- Benchmarking against competitors, comparing the depth and breadth of multilingual communications with HP's.
- Demonstrating cost savings by proving the feasibility and benefits of translation memory reuse. In one example, the team was able to reveal a 21% reuse level within a single department and in addition, an 18% reduction in content redundancy when applied to a second department.
- Publishing a process model based on business process analysis performed on T&L activity, including detail on tasks, processes and associated costs.
- Hiring a third-party consultancy to develop simple, repeatable messaging for an internal "process poster," still viable for current efforts.

Results

Today, HP has expanded its translation memory throughput to an estimated 130 million words, representing 25% of all product and brand content assets utilized across 36 languages. As Toon notes, "IP ownership and leverage of the assets were major objectives when we first started in 1998," says Toon. "What we've accomplished is a major win for HP."

The T&L team has grown to 12 professionals that help execute the company's globalization strategy and resulting GCVC. Their responsibilities include strategy development, internal education, governance, advisory services, and technology procurement and maintenance. Consistent communication with regional subject matter experts (SMEs) helps the team "think global and act local." Strong collaboration with HP's Application/Content Globalization team (an internal, project management service center for various globalization initiatives) and third-party Language Service Providers helps the team sustain a broad awareness of multilingual communications requirements and value.

It is interesting to note that the T&L team has not always operated based on a corporate mandate for divisional or business unit utilization. In fact, it was only recently that the team gained formal sponsorship at the highest levels through a well-defined executive business case. HP's Executive Committee (EC) now sponsors the T&L architecture for HP translations.

Still, encouraging adoption, proving value, and reinforcing a shared vision for global customer satisfaction are an ongoing T&L effort. Although this presents cultural challenges at times, the team's achievements over the past 10 years speaks volumes about the ability of GCVCs to reduce costs, increase revenue, and create financial value for organizations. As a result:

- The T&L team manages the HP ETMA (Enterprise Translation Management Architecture) that is integrated with various content management systems, enabling business units to upload content for translation projects and collaboratively manage status.
- The reuse rate of product and brand content currently managed within the ETMA is estimated at 68%.
- HP.com content is extremely structured based on the "HP Gateway Framework," a scalable governance and technology layer that defines a shared infrastructure for global brand content, terminology and catalog management.
- A balance of centralized T&L operations (including the approval of HP's Language Service Provider (LSP) channel) and distributed processes provide HP business units, regions and countries with the latitude to maintain close relationships with local SMEs and LSPs.

Gilbane Group Perspective

HP has long been a "poster child" to demonstrate of globalization strategy and execution. In fact, Toon and her team have achieved results cited as best practices by many sources, including the Gilbane Group[13]. For those organizations emulating HP success in this area, it is refreshing that the company continuously shares objectives, lessons learned, and largely through Toon, candid and realistic views of pervasive challenges regardless of company size.

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[13] Gilbane Group, *Global Content Management: Hewlett-Packard Talks the Talk of Worldwide Business*, January 2005. http://gilbane.com/case_studies/HP_case_study.html

International Health Insurance Danmark

Company Description

International Health Insurance Danmark (IHI) is the world's largest provider of international health insurance for individuals, and is a major player in supplying this insurance to corporations as well. Founded over thirty years ago as way for Danish people to maintain healthcare when traveling outside the country, IHI now has over $400 million in revenue from 380,000 policy holders in 200 countries, and claims market share of 19% globally. IHI has a strong global web presence at www.ihi.com. Always a technology innovator, IHI was first to sell insurance online (1996), and first to provide chat in multiple languages. In June of 2005, British healthcare giant Bupa, which has 48,000 employees and over £4 billion in revenue, acquired IHI.

Focus on Brand Content

A truly international company, IHI publishes content in 11 languages, including English, Scandinavian languages, and others. A significant share of IHI business comes from countries outside of Europe. Content is published in multiple languages on the corporate web site, extranets, and portals, and is used as well as used for quotations, applications, and collateral. Multilingual communications is considered a competitive advantage, especially since the largest share of policies were provided to individuals (business-to-consumer).

A recent customer survey of IHI customers revealed that 75% rated IHI customer service as "excellent" or "very good," and over 80% stated that they would recommend IHI to others. IHI also has a solid financial reputation, and was rated highly by Standard & Poor's.

Challenges

IHI aspired to maintain these high levels of customer satisfaction and positive brand across their web operations. IHI's 500 employees, drawn from more than 25 different countries and collectively speaking over 35 languages, were responsible for multilingual phone and personal communications. In order to attain high levels of customer satisfaction, ensure loyalty and prevent churn, and maintain content quality, these employees did much of the translation work themselves; the remainder was done by LSPs, which rarely satisfied IHI's standards for content quality.

In addition, they were moving to an e-commerce business model where clients could manage every aspect of their insurance on the web, including review portfolio details, , and schedules, purchase a policy, pay premiums, file claims, and monitor reimbursements – and all this was to be done for printed documents in many languages and different currencies.

The corporate web site was localized into 3 languages: Danish, English, and Spanish. The web team, operating under clear cost constraints, was tasked with delivering high-quality content to the three corporate language sites, as well as ensuring that each customer had a positive online experience in their chosen language. IHI was also required to meet regulatory standards of the Danish Insurance Contracts Act, European supervisory authorities, and the Danish FSA.

The Solution

IHI revamped and improved their overall web solution and operations. They optimized their processes for preparation and delivery of multilingual information on the web. They also implemented powerful, new web technology from Sitecore for their corporate web sites. Due to its solid support for content in multiple languages and ability to interface with different content formats and translation management systems, Sitecore was used to author the web content, store and manage insurance information, submit and retrieve translation files, and publish approved content. IHI augments Sitecore with industry-standard tools for design and layout.

Best Practices Highlights

- ✓ Centralized localization with regional participation
- ✓ Focus on content accuracy
- ✓ Balanced use of internal and external resources
- ✓ Leverage technology for grater reuse and efficiencies

IHI selected and managed LSPs for the corporate web site from Denmark, as the performance from service providers varied substantially, due to the difficult subject matter and technical aspects of health insurance. IHI felt that there was too much at risk to permit lapses in language quality or accuracy. In keeping with its status as a technology innovator, IHI also selected and implemented translation management tools in-house to improve translation quality, volume, and information delivery. These new tools help ensure that approved translations, whether from IHI employees or LSPs, were repurposed for use with all textual materials (across all web sites and printed materials). IHI now has the multilingual processes, technology, and people in place to meet current demand while maintaining content quality, and still scale to accomodate future growth. According to Mette Nohr, head of e-business , "We did our job so well that our owners, Bupa International, has expanded our charter to support web properties beyond IHI."

Gilbane Group Perspective

IHI evolved their web communication from an ad hoc approach with high-quality personnel to a formal structure and process that incorporates all IHI and partner resources, and delivers high quality, local-language information. They centralized web management and localization solutions for the web, and simultaneously extended these services and capabilities to support a wide range of countries and regions, many of which were serviced by third-party organizations. IHI is living proof that, if the right framework is put in place, a small to medium sized organization can provide a scalable, high-quality experience to online customers in their local languages - even a company that is broadly dispersed, operates in many locales, and is highly regulated.

Océ

Company Description

Headquartered in The Netherlands, Océ enables its customers to manage their documents efficiently and effectively by offering innovative print and document management products and services for professional environments. Océ's global presence is demonstrated by a worldwide distribution network active in 90 countries, fully-owned operating companies in some 30 countries, € 3.1 billion in revenues, and nearly 24,000 employees.

The company's 130-year heritage is impressive. According to company history Océ established itself as the leading supplier of engineering document reproduction and printing systems in the mid-1990s, with a 20 percent worldwide share and a 25 percent European share. In June 2008, Océ Business Services was ranked the No.1 document process outsourcing (DPO) vendor for the second straight year and named to the prestigious "50 Best Managed Global Outsourcing Vendors" list by the 2008 Black Book of Outsourcing annual user survey.

Focus on Brand Content

Océ enjoys a reputation founded on productivity and reliability, ease of use and a favorable total cost of ownership. Managing its global brand identity is critical to corporate operations and in particular, to ensuring consistent communications across a vast distribution network. The company utilizes a formal, multi-disciplinary team of internal marketing and communication professionals to create branding policies and identify brand identity issues. Based on the mission to further develop the Océ brand, the International Brand Team manages the Océ Brand Identity Program.

"Multilingual communications are a critical part of Océ's strategy for continuing global success," notes E-Business Development Manager Michel van der Wal. His perspective includes the strong belief that consumers in most European countries buy high technology products more readily when information is available in native languages. As such, brand content is developed with "multilingual in mind."

Supported by an Océ corporate mandate for product content availability in 21 languages, van der Wal aims to align global and product brand content with this mission. Business drivers for doing so include faster time to market, meeting country-specific regulatory requirements, and supporting the growing demand for a simultaneous shipment strategy.

Challenges

Océ's business-to-business commerce model and its network of communities is a critical part of the company's ability to maintain and expand global presence. In this model, the dynamics of ensuring brand consistency for multilingual marketing communications includes multiple layers of customer expectations from partners and consumers.

As is the "holy grail" for most multinational organizations, Océ's overriding challenge is to balance the corporate governance required for brand consistency with the regional autonomy necessary for brand relevancy. Doing so takes a series of phased efforts; reaching the balance doesn't happen overnight. Leveraging process and technology standards from the company's finely-tuned, product content value chain was a reliable "first step" in constructing a plan to decrease time to market for the brand content lifecycle. Product documentation's use of simplified English with authoring assistance technologies, a centralized base of XML content, and LSP-based translation memory management aligns deliverables based on Simship objectives and country-specific regulatory requirements.

As we've discussed in this report, web-driven geographical marketing is equally complex, but has its own set of challenges. Océ's regional marketing teams were used to a great deal of independence and financial autonomy during the creation and management brand content in their customers' language of choice. On the one hand, results included loyal regional customers that valued a personalized approach for services and a localized approach for communications.

On the other hand, the decentralized model enabled inefficiencies over time, severely impacted time to market. Siloed campaign development processes were norm, preventing content reuse and increasing the likelihood of inaccuracies. Responsibility for reviewing localized materials was not a formal part of anyone's job, overtaxing resources and delaying content availability. Inaccuracies across localized product terminology increased, jeopardizing content and brand quality.

Knowing that collaborative corporate and regional brainstorming was the only way to drive a customer-centric solution, van der Wal approached an internal assessment phase as a shared venture. The objective? Finding the right balance of a global *and* regional approach to multilingual brand communications. Regional team members acknowledged the need for global consistency and accuracy, but felt strongly that localization at the regional level was a core part of their expertise.

The Solution

van der Wal's intention to create all brand content "with multilingual in mind" required changing various aspects of people, process, and technology. In many respects, the "people aspect" of managing organizational change proved the most challenging.

An objective assessment proved to be a valuable tool in van der Wal's approach to the inevitable resistance operational champions often face. Using examples from current Océ web sites, van der Wal arranged a local awareness meeting facilitated by Gerry McGovern, a

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Best Practices Highlights

✓ Cross-geography internal education

✓ Balance of centralized and distributed operations

✓ Integration of content and translation management

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well-known industry expert and author.[14] In addition to providing advice on the value of web communications, McGovern candidly pointed out brand risks within a sample set of the company's worldwide marketing content. Interactions with Océ's International Brand Team were also indispensable. During one pivotal meeting, collaborative realization that humans would always be required for localization/translation efforts and current translators remained integral to brand management "made the difference" in shared understanding and acceptance.

The Océ team is currently implementing a centralized, shared base of brand content managed by SDL Tridion's R5 WCM solution as a focal point for ongoing process and technology changes. A tight integration between content and translation management will enable central control of content and workflow. A pilot project based on a selection of marketing materials is underway. Regions will be able to opt in or out of the resulting centralized technology process. However, the feasibility of reducing baseline web content translation processes from 6 weeks to an estimated 5 days is enticing to regions aiming to increase sales and decrease time to market.

Results

Océ corporate communications now determines which languages brand materials are published in as well as the level of content required for baseline translation. Regions retain the ability to adapt and customize brand information to address local customer expectations. The company regularly measures content reuse, brand recognition, and the instances of language inaccuracies or errors. According to van der Wal, one of the greatest impacts will be shorter time to market for regional marketing campaigns. In turn, this will surely accelerate Océ access to global revenues in established and emerging markets.

Gilbane Group Perspective

Océ has successfully implemented the core infrastructure for a Global Content Value Chain (GCVC) and is well-positioned to reap its benefits. By tightly integrating content and translation management technologies and workflows, the company has also laid the foundation needed to ensure the flow of information across the chain.

Facing a struggle relevant to all multinational organizations with valuable investments in global presence, Océ has designed a shared and reasonable balance of centralized and distributed operations for its brand content GCVC. The company clearly understands that permeating its "Beyond the Ordinary" global brand is essential for continuous worldwide expansion and targeted vertical growth. At the same time, it is empowering employees to consistently infuse brand principles and achieve regional competitive advantage without sacrificing local customer

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[14] McGovern, Gerry. *Killer Web Content: Make the Sale, Deliver the Service, Build the Brand.* A&C Black. September, 2007.

Pitney Bowes Software

Company Description

Pitney Bowes MapInfo and Pitney Bowes Group 1
Software help customers make more insightful
decisions. Through a combination of location
intelligence, data quality and communication management capabilities, they drive
better decisions and increase the accuracy and effectiveness of customer information
delivery.

Focus on Product Content

Pitney Bowes' software operations unit delivers over $400 million in sales to the
organization. A recently merged entity, Pitney Bowes Software consolidates both
Pitney Bowes MapInfo and Pitney Bowes Group 1 Software offerings.

Their software applications are distributed and used in 60 countries, requiring the
organization to create, manage, and publish product and marketing contents in 20
languages. In the early days at MapInfo, the localization efforts were decentralized and
ad-hoc. There was no global strategy for localization. The localization group within
MapInfo found this problematic. Given the aggregate volume of translation, they knew
they were missing opportunities to speed time to market, ensure consistent messaging
across multiple languages, and reduce costs.

The MapInfo localization group slowly transitioned into a centralized localization
operation that managed translation services provided by an assortment of Language
Service Providers (LSPs). To achieve these dramatic increases in sales, the regions
would need to meet a growing demand for local-language content. These regions,
lacking dedicated and experienced in-country resources to manage translation, were
beginning to embrace the idea of a central localization service for many types of
content.

Challenges

Pitney Bowes Software recognized that they would need to assemble these different
products into a single integrated offering and communicate this offering to global
markets. However, communicating product information for all its products quickly and
consistently across countries and regions was a painstaking and often manual process -
since there was no common approach to sharing and leveraging language assets across
multiple LSPs, and no way to consolidate translations centrally.

While the company clearly valued multilingual communications and had an aggressive
revenue expansion plan, there was no overarching strategy in place to drive the
evolution of localization, and no common architecture and processes enabling them to
scale to meet the growing demand for multilingual product information. It needed a
more formal business model that established a reasonable balance between centralized

and distributed operations, and commitments from the regions to fund and support centralized localization.

It was incumbent on the central localization team to justify to the regions why they should relinquish any control over localization and how that impacts the organization's overall efficiency and effectiveness. Further, the central localization team was tasked with spreading best practices for internationalizing the software to prepare for local-language markets, as well as localizing software GUIs and documentation. Moreover, the regions and central localization would need to work together to address a broad array of other requirements, including country regulations, revenue increases in new vertical markets, improvements in global brand management, and greater content accuracy and quality.

The Solution

Yuka Kurihara's (Localization Manager) plan was to influence the source content development process and scale localization operations to build an integrated solution for global communication. To ensure operational effectiveness, the new solution would:

- Meet the regions' needs by delivering higher quality translated content faster and at a lower cost; and
- Meet corporate product and market management requirements by ensuring a greater level of consistency and accuracy while maintaining the local nuance.

Best Practice Highlights

✓ Centralized localization with regional participation

✓ Executive endorsement for resource allocation

✓ Careful approach to technology adoption and process improvement

✓ Clear process for selecting and managing LSPs

In May 2007, a strategic solution was approved by senior management that focused on improving each component of the Global Content Value Chain (GCVC) for product and marketing content. As part of the solution, the central localization team secured the funding for a translation management system that included technologies for translation memory, terminology management and extensive project monitoring and management. In parallel the unit made a decision to follow the DITA approach and standards for topic-based authoring for all new content development. For existing content, the decision to move to DITA was handled on a case-by-case basis.

To make sure the translation applications were fully utilized – and the investment recouped – the company sought LSPs that were well versed with this technology. It was critical to partner with LSPs that have a global IT infrastructure, extensive experience with enterprise translation management systems and a reputation for flexibility and responsiveness. Tying this together was a global process that required both product and market management and regional operations to review and approve translations.

Results

Today, the merged entity has evolved their centralized localization from a small group within engineering into a robust corporate localization service that translates over 10 million words per year into 20 languages while successfully meeting the localization requirements mandated by their regions. According to Yuka Kurihara, "Multilingual product communications is a critical part of our success and will give us a competitive advantage."

Gilbane Group Perspective

Pitney Bowes Software has achieved operational excellence with their global product communication. They have successfully established a means to share language assets as well as an effective balance of centralized and regional localization that works for their corporate culture. The adoption of a translation management system coupled with their choice to follow the DITA approach reinforced the need for common technology and processes. The key to the company's success, however, was in-house management – retaining all linguistic assets, overseeing all localization operations in-house, and managing a portfolio of successful LSPs. "Today, the outcome is clear." Kurihara commented, "We have a well-rounded, balanced approach to localization. As a result we have better contact and relations with customers."

Powerwave Technologies

Company Description

Headquartered in California, USA, Powerwave is a
global supplier of end-to-end wireless
infrastructure solutions for wireless
communications networks. The company designs,
manufactures and markets antennas, boosters, combiners, filters, repeaters, multi-
carrier RF power amplifiers and tower-mounted amplifiers, and advanced coverage
solutions for use in worldwide cellular, PCS, and 3G networks.

Founded in 1985, Powerwave made a series of acquisitions from 2001 through 2005,
significantly expanding its global footprint and customer base in the wireless
infrastructure market. The company boasts account representatives in 50 countries
covering 4 continents, resulting in 2007 sales of USD 780.5M (approximately 73%
international.) In early 2008, Powerwave expanded its international network by adding
a sales office in Dubai to serve a growing customer base in the Middle East.

Focus on Brand Content

In 2007, Powerwave's corporate marketing organization redesigned the core English-
driven powerwave.com web site to incorporate the company's new brand identity. The
effort specifically included plans for multilingual web sites based on the team's strong
knowledge of cultural requirements within Powerwave's international profile as well as
regionally-driven demand.

As an operational champion for multilingual communications, Manager of Marketing
Programs Gregg Prettyman clearly understands the influence of native-language brand
content in building strong customer relationships. "Translation at the word for word
level does not guarantee ad7vantage in customer relationship management efforts; true
localization efforts such as including appropriate images and local phrases that make
sense are critical." Ongoing research and consistent collaboration with regional
managers strengthens Prettyman's expertise in specific country-based requirements.

A tangible example was the team's design and launch of the company's Chinese
language site (also in 2007.) As Prettyman noted, "China is a good example of a country
in which success and loyalty is directly related to multilingual communications. We
could not launch our brand based on the perception that Powerwave was a Western
company with little experience in Chinese culture. In fact, we quickly realized that we
needed the appearance of a company with a strong regional presence and actual
business to prove it." Prettyman also noted Finland, Norway and countries in South
America that have strong customer expectations for multilingual communications.

Challenges

Powerwave's organic growth and acquisition strategy has clearly enabled the company
to broaden its product portfolio and expand global presence. In parallel however, it has

increased the pressure on the marketing team to quickly incorporate new product messaging into brand identity and increase international web presence.

Although not sanctioned by an executive mandate, the team felt strongly that multilingual brand content would be an important factor in developing strong relationships with existing and new customers. Core challenges in providing it were time to market, efficiency, and containing cost. Prior to the Powerwave.com redesign, Prettyman noted that changes to company web sites required "six to seven steps, lots of time, and emails back and forth between IT and various business units."

It is also interesting to note the team's perspective on the importance of multilingual communications for internal communications, a growing challenge for companies with globally-dispersed workforces. As Prettyman noted, "We have sales representatives all over the world and often need to translate C-level communications so that everyone is on same page; we've found that a common misconception in global companies is that all employees speak English as a first language."

Taking a bottom-up approach, marketing identified the needs for a web content management system that would streamline existing processes and scale according to globalization requirements. The team's top three WCM requirements? Multiple language support, the ability to quickly build secure, personalized extranets for OEM partners, and ease-of-use.

The Solution

Powerwave's corporate marketing team realized its vision through a strategic investment in RedDot, the WCM solution from Open Text Corporation. Using this solution as a core infrastructure enables the team to centralize all brand content assets (including multilingual variations) and processes that support Powerwave's brand-driven Global Content Value Chain (GCVC).

The approach makes significant use of the solution's Translation Editor and workflow capabilities, and includes LSP professionals as WCM users. In fact, the team trained its largest LSP on RedDot capabilities that enable them to view side-by-side comparisons of a specific language site and the main English site.

Best Practice Highlights

✓ Operational champion

✓ Content management as an infrastructure component

✓ Localization and translation approach delivers targeted customer experience

✓ Strategic LSP relationship

Results

The Powerwave approach includes the following results:

- A centralized 9-person marketing team that makes decisions on what languages to support and the depth of localized/translated content to be provided.

- Designation of a primary LSP that has access to subject matter experts according to Powerwave's language requirements.

- LSP involvement at selected company marketing or industry trade shows. A Clearly an added-value to the traditional LSP relationship, these occurrences support Prettyman's belief that "'marketing is not just about collateral, Powerwave has relationships built from events and trade shows that often need country-specific, native-speaking subject matter experts on the ground."
- Access to a terminology database managed by third-party vendor.
- Role-based security for WCM access that includes geography metadata.

The team strongly believes that their approach will result in an ROI based on improved customer relationships and increased revenues in emerging geographic markets.

Gilbane Group Perspective

Powerwave is successfully implementing core the infrastructure for a GCVC. Although they are not using translation memory technologies, they have also ensured the flow of information between the content and translation management by including their primary LSP as a WCM user.

The marketing commitment to "localization – not just translation" is admirable and on target with Gilbane's research on country and cultural expectations for multilingual communications. By focusing on success for a particular language site, in this case Chinese, we believe the team will be able to continuously prove success and competitive advantage to executive levels, raising the visibility and value of multilingual communications.

Symantec

Company Description

Symantec is a global leader in providing security, storage and systems management solutions to help businesses and consumers secure and manage their information. Headquartered in Cupertino, Calif., Symantec has operations in more than 40 countries.
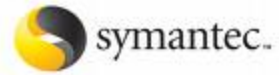
Marking its 25th anniversary in 2007, Symantec published an extensive corporate history, drawing interesting parallels between its own evolution and the Internet-driven information explosion. As the web has transformed from consumer networks to enterprise infrastructures, so too has Symantec, demonstrated by a steady focus on individual and business requirements for online safety. The company's customer-driven philosophy extends to freely accessible thought leadership on topics such as security, storage, performance, compliance, and IT risk management, providing knowledge value in addition to products and solutions.

One of Symantec's five stated "engines of growth" is to grow faster than the market in the world's fast-growing economies, including geographies such as Eastern Europe, Russia, India, China, Brazil, and Latin America. Intrinsically tied to the company's mission to "manage the world's information," this objective requires consistent innovation in global information management strategies – for their customers and for themselves.

Focus on Product Content

Symantec's commitment to multilingual product content is hardly new. In fact, operational processes for localization and translation have been in place for over 15 years driven by consumer demand, particularly from Japan, France, and Germany. A founding member of TAUS (Translation Automation User Society), the company has been steadfastly involved in sharing and promoting innovations in translation technologies since 2004. Dr Fred Hollowood, Symantec's Director, Global Language Services, serves on the current TAUS Advisory Board.

Much of this collaborative work is led by Stephen Brennan, Symantec's Vice President, Shared Engineering Services, whose longtime objective to integrate language technologies within the enterprise is well-known. Brennan runs a global team that manages language production for Symantec's deep reservoir of multilingual product content. Meeting worldwide customer expectations requires language outputs that range from a base set of requirements (including Japanese, Simplified Chinese, French, German, Italian and Spanish) to up to 27 languages.

Proactive availability of security information extends far beyond traditional customer service operations. In an environment where the velocity of cyber threats can be measured in milliseconds and the response required in minutes, content creation, localization/translation and dynamic repurposing takes on a whole new meaning.

There's no latitude for collaboration or communication gaps between documentation and technical support, no time for redundant and inefficient processes, and little consumer or business patience for delays and errors. As Brennan's team noted in 2005, "Volumes are growing and costs are too high. We need to respond more quickly to customers' needs. Sometimes we must turn-around localized technical articles within an hour."15

Challenges

Symantec's international customers must be able to understand and apply preventative and crisis-based information in their native language, period. From this perspective, the company does not have the luxury of choice when it comes to providing multilingual product and support content. Sustaining its leadership position in responsiveness and accuracy depends on it. Successful emerging market expansion through the "engines of growth" mission hinges on it.

Brennan describes one of his primary objectives as the ability to achieve "worldwide content reuse through innovative process and technology." His distinct vision for globalization strategy however, does not mean that Symantec does not face organizational challenges. Like many organizations, strategy execution is often tactical, departmentally driven through initiatives from distinct product groups and the company's customer experience team.

On the other hand, Symantec clearly has an end-to-end concept of the Global Content Value Chain (GCVC). Rather than identifying specific processes for isolated improvement and technology investments, Brennan notes that the company strives to maintain and refine an "infrastructure perspective." Doing so is consistently a challenge in itself, but it is also necessary for the Global Languages Services team to meet corporate objectives to cut costs and demonstrate annual savings.

Isolating the right "productivity boosters" for efficiency can be difficult, particularly when it requires iterative process re-engineering and training programs that instill and promote user adoption. This challenge is especially significant for what Brennan describes as "the next frontier:" to service the multilingual communications needs of customer service operations by improving the speed and accuracy of responses.

Symantec has been active in assessing and proving the successful use of machine translation in a customer support environment. This long-term investment continues to yield more and more accuracy as the company's translation memory knowledge base grows. However, conquering one challenge often exposes an existing underlying challenge. In this case, the availability of multilingual information is layered over the problem of the *relevance* of the information to a specific problem in a specific region. As Brennan notes, "extracting relevance on a dynamic basis is essential for providing the right information at the right time and in the right language."

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15 TAUS Newsletter, May 2005.
http://www.translationautomation.com/newsletter/TAUS_Newsletter_03.pdf

The Solution

Symantec's infrastructure perspective on GCVC components has helped the company identify a number of principles that lay the foundation for Brennan's vision of worldwide content reuse. Demonstrating a combination of process and technology "pillars," this approach underscores the benefits of multiple best practices:

- **Better source content yields more accurate translations.** Pillars include XML-driven controlled authoring, authoring assistance through electronic style guides, and accessible translation memory during content creation.

- **Strategize collaboratively.** Pillars include guidelines and processes for regional sales groups to develop business cases for multilingual communications initiatives. For example, groups assess strategy with Global Language Services who then helps make the case to the appropriate corporate product group. Historical experience and revenue projections are factored into decision-making.

- **Formalized source control is critical.**
Based on Brennan's "fix the source or pay for post-editing" mantra, pillars include centralized web content management (WCM), component content management (CCM), and terminology management solutions, each integrated with translation memory.

- **Automation boosts globalization capacities.** Pillars include the integration of Systran's machine translation technologies with translation memory management. As Brennan noted, "Automated translation software is a powerful innovation when integrated into a streamlined translation workflow."

- **Measurement is a success factor.** Focus points include pre and post-process efficiency, levels of content reuse, post-editing effort in translation, quality of machine-translated output and customer satisfaction.

> **Best Practice Highlights**
> - ✓ Operational champion
> - ✓ Executive endorsement
> - ✓ Multilingual communications as a means to meet customer expectations
> - ✓ Quality at the source perspective
> - ✓ Strategic use of automated translation technology

Results

Symantec's achievements are incremental and ongoing, which is another key takeaway from this profile. The company is able to drive toward long-term goals by investing strategically and setting expectations for immediate and future results. For example, a 1 ½ year investment in the company's terminology database has resulted in a more consistent writing style in source and supported better MT output across a range of languages. Brennan notes that the company now has a proactive rather than reactive approach to global content consistency and the accuracy that can be applied to multiple multilingual communications initiatives. In addition:

- A strategic approach to outsourcing actual translations has resulted in the identification and use of a few specialized vendors for post-editing services and fewer internal linguists who now support our MT technology.
- A 3 ½ year plan to refine the traditional technical documentation process through the use of XML, CCM, and controlled authoring included considerable education and training components. As a result, the company reports an 85% user adoption of new authoring tools and processes, up from less than 50% for the previous year.
- The use of machine translation addresses scalability and cost control. For certain languages, multilingual communications throughput for documentation sets has grown by 60% year on year.
- Translation memory reuse has been measured at between 68 and 82% depending on the project.

Gilbane Group Perspective

Symantec is focused and steady in its roadmap for multilingual communications that strengthen customer relationships. Although this profile focuses on product content as Gilbane has defined it, Symantec is a company driving toward cross-application utilization of product content's role in dynamic problem solving, namely customer service operations. The company's infrastructure view of global content value, an impressive and visionary operational champion, and investment in the innovative application of technology such as machine translation surely positions them for continued success.

Glossary of Terms

Definitions are critical to a clear understanding of the Global Content Value Chain (GCVC). The following table provides glossary of key terms used in this report as well as industry standard definitions from sources such as the Globalization & Localization Association (GALA) and The Localisation Industry Standards Association (LISA).

Term	Definition
Authoring Assistance	Software for improving the quality and consistency of multilingual communications by prompting for localization-ready content, implementing corporate style guidelines, and promoting usage that is grammatically correct.
Content Globalization	Strategy and process for preparing, managing, and publishing multilingual information to help meet goals for global growth.
Global Content Value Chain (GCVC)	A strategy for moving multilingual content from creation through consumption according to the needs of its target audience. The strategy is supported by practices in disciplines such as content management and localization/translation management. The enabling infrastructure for the strategy comprises people, process, and technology.
Globalization	The process of making all the necessary technical, financial, managerial, personnel, marketing, and other enterprise decisions necessary to facilitate international business.
Internationalization	The process of adapting a product so that it can handle multiple languages and cultural conventions without the need for redesign.
Language Service Provider (LSP)	A company that provides translation, localization, and/or internationalization services.
Localization	The process of adapting information to a specific language or culture so that it seems natural to that particular region, which includes translation, culture, customs, technical and other local characteristics.
Machine Translation	Technology that automatically translates text from one language to another, using terminology glossaries and advanced grammatical, syntactic, and semantic analysis techniques.
Multichannel Publishing	Presentation and distribution of content through a variety of media, including printed manuals and marketing collateral, public web sites, portals, mobile phones and devices.
Multilingual Communications	Textual communication in multiple languages.

Term	Definition
Supply Chain	The network of manufacturers, wholesalers, distributors, and retailers, who turn raw materials into finished goods and services and deliver them to consumers. Supply chains are increasingly being seen as integrated entities, and closer relationships between the organizations throughout the chain can bring competitive advantage, reduce costs, and help to maintain a loyal customer base.
Terminology Management	A database of terms and contextual information relating to those terms, which shows equivalents from one language to another.
Translation	The process of converting words and text from a source language to a target language.
Translation Management System (TMS)	Software for managing complete localization and translation processes, including translation memory, terminology management, and workflow.
Translation Memory	A special database that stores previously translated sentences which can then be reused in full or in part.
Visual Software Localization	Technology for localizing the user interface of software products, including screen messages, dialogue boxes, and other aspects of software appearance.

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Jahia

Jahia is headquartered in Geneva, Switzerland with subsidiaries in
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Content and Portal Management platform. By leveraging state of the
art Open Source frameworks and libraries, Jahia offers as many features as the
top high-end commercial Content Management Systems or Corporate Portal Servers in
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source code. Jahia promotes an innovative business model in the Professional Open
Source world. For more information, visit http://www.jahia.com/.

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Jonckers Translation and Engineering, Microsoft 2007 Service
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RedDot, Open Text's Web Solutions Group

Open Text's Web Solutions Group, a leading Web Content
Management (WCM) software, provides Web Solutions to
create, manage and deliver the content that drives business.
The content management and delivery solutions are
recognized throughout the industry for their legendary ease
of use and feature leading multilingual support; enterprise Web 2.0 capabilities;
content integration; and contextualized delivery. RedDot is the Web solutions offering
of Open Text, an enterprise software company and leader in enterprise content
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Sajan

Sajan provides language translation management solutions for the
enterprise client. Our key focus is on creating value using advanced
multilingual data management technologies, rich process
automation features, an open architecture, comprehensive analytics
and the ability to easily connect to other business applications
(including CMS), as this strategy is core to the realization of a truly global content
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the hands of those who have successfully developed and integrated an enterprise class
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SDL Tridion

Since its establishment in 1999, SDL Tridion has focused
on enabling customers to manage their content within a
Web environment. SDL Tridion works in close partnership with its customers to
develop solutions that fulfill real, practical business needs. SDL Tridion R5, the core
product, provides complete Web content management and content delivery capabilities,
focusing on ease-of-use for all content contributors, site managers and power users.
SDL Tridion's foundation and core strength is BluePrinting technology, which has
proven its value for organizations that need globalized Web sites, brand management,
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Sitecore's Web Content Management System (CMS) and
portal software solutions enable companies to deliver
compelling web experiences. Organizations around the
world rely on Sitecore's multi-site support, multi-
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SYSTRAN is the market leading provider of language translation software for the desktop, enterprise and Internet. SYSTRAN's products and solutions help businesses and individuals instantly translate and understand multilingual information and communicate more effectively in 52 language combinations. Use of SYSTRAN solutions enhances productivity and time-savings for B2E, B2B and B2C markets as they deliver real-time language solutions for search, content management, online customer support, intra/inter company collaboration, and other business applications. Customers include leading global corporations, portals Microsoft® and Yahoo!®, the US Intelligence Community, and the European Commission. SYSTRAN is headquartered in Paris, France, and has a North American office in San Diego, CA. For more information, visit http://www.systransoft.com/.

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