Harvard Business Review

Modernizing publishing infrastructure
to embrace an evolving media strategy

EVERYONE KNOWS *Harvard Business Review* as the highly respected publication on business management practices produced by Harvard Business School. But as a cross-platform publisher, with books, web content, and mobile content, *Harvard Business Review* faces the same challenges that any consumer media company wrestles with today.

With meticulous standards for editorial and design content, keeping publishing operations efficient, timely and cost-effective, requires the continual application of many of the best practices their own subject matter focuses on.

The Challenge

In 2006, after many years of operating with an established workflow and publishing platform, HBR decided it was time to take an aggressive look

at how they could work better, and poise themselves for greater flexibility in the content creation and publishing process.

HBR had been working within a very serialized process, by first creating and editing text, and later planning and executing design and imagery, which was driven largely by their existing publishing technology and the options that offered at the time. The publishing platform they had relied on for many years was coming to the end of its life. Knowing newer tools and technologies were available, and more sophisticated processes were now an option, HBR set out to review and analyze a better way to work.

Having heard about Technology for Publishing (TFP) from other publishers who had worked with them, Dana Lissy, Editorial Production Director for HBR, retained them to help guide the effort. "We were looking

to address a number of issues – replacing outdated systems that were unstable, embracing newer tools such as InDesign that would allow us to do more, and overall, prepare our content production to be more collaborative, efficient and flexible as we embraced new directions," says Ms. Lissy.

The Approach
The first task was to convert existing processes to InDesign.

This wasn't just about migrating existing design, templates and process to a new application. This step allowed HBR to take a fresh look at how it created pages, and how those pages not only supported an editorial process but also provided the basis for content to move online for other uses and for digital distribution.

Technology for Publishing helped to educate and refine template best practices, and

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develop standards for content structure, as well as instill a broader understanding of how the handling of page elements and layout creation impacts everyone who works with the content.

A big part of this phase was teaching HBR Design and Production staff how to best utilize InDesign features and functionality to create adroit templates. "It was a facilitated process that focused heavily on knowledge transfer and skill expansion – it's always great to see the users work through the challenge of a learning curve and change, and experience the reward of tackling that process with their new-found knowledge, especially when it seems daunting at first," notes Margot Knorr Mancini, President of Technology for Publishing.

Knowing they could tackle a complex conversion process like their InDesign transition helped to bolster HBR staff's confidence

and momentum in taking on the next stages of improvement. With the publishing client environment stabilized, how could they address the rest of their technology requirements? Could they take a fresh look at their overall editorial and design processes and improve the way they worked? How could they improve and tighten the integration between print and web, knowing that this convergence was a new reality for their content?

Technology for Publishing led a multi-stage workflow analysis, starting by pinpointing the way the existing process was executed and understood by all participants. The current state review brought to light differences in perception of why and how things were done, a common issue when staffs change and grow. It also helped to shake out a list of pain points, bottlenecks and a wish list of desired improvements.

The current workflow evaluation also made note of changing business issues and direction, and specific constraints that were unique to the business. In HBR's case, experts in the field write the majority of their content. Because of this, coordination with authors is more challenging than most publications (take former President Bill Clinton, for example). Authors have exceptionally busy schedules but must stay involved with their work deeper into the editorial process than traditional authors as the piece is edited and designed in order to stay true to their intent.

Noting these constraints, the lists of desired improvements, current best practices, and options that newer technologies brought, TFP provided an analysis of the overall workflow for HBR. In any workflow review, TFP points out inefficiencies due to redundant effort, especially from paper-based

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editing; effort placed at the wrong point in a process—which usually results in rework; and insufficient use of tools and technologies that can bring improvements. "We make it a point to push a publishing workgroup past their comfort zone with suggested changes—changes that are manageable and in use today by other publishers, but something that is usually a stretch goal from where they are currently," says Ms.

Knorr Mancini.
"It helps them to see how far they really can or should go. It reminds them that change should be ongoing, but also helps them to be realistic in the end, when we bring that back to something that can be executed for success."

As HBR reviewed the analysis, there were several areas of "low-hanging fruit" or quick improvements that they could implement on their own, that

would start to add value to the bigger effort. Other areas that required more dramatic change across the work groups, took some time and further discussion in order to prioritize next steps. HBR determined which changes would be most beneficial, and also most successful, then set out to create a new workflow with TFP.

Top on the list for intended changes was to reduce the number of reviews per story, reducing them to fewer, more efficiently placed reviews. Additionally, reducing the amount of paper-based markup and subsequent input and verification of changes was a transition that could be realized by rethinking roles, and using newer technology to work electronically. Taking time for the review process helped the HBR staff to ask themselves, "Do we really need to do this step? How can we work differently, in a way that would help us to be more effective?"

Technology Analysis

As content structure and strategy came into the discussion, HBR began to evaluate vjoon's K4 as an editorial publishing system to bring additional benefits to their workflow. "Knowing that K4 had the ability to help us get our content to the web more easily was a big draw," notes Ms. Lissy.

Additionally, the potential for parallel edit and design was a big benefit. The ability to allow editors and copy editors to access text on live pages while designers were working on layouts had never been an option, and led to a significant amount of redundant effort. The file management and production tracking potential was also very attractive, as it provided the ability for work in progress to be visible and transparent to all involved, something not possible in the previous HBR system.

TFP led HBR through an evaluation of K4, and soon thereafter, implementation. Once HBR decided on K4, a new workflow was designed that combined the newly clarified business objectives, desired workflow changes, and newly achievable options brought by K4. "TFP led us through a series of sessions, illustrating options for how we could choose to implement our workflow in K4. From there we did several more of our own sessions—something we might not have done on our own previously, and then we tested the workflow," says Ms. Lissy. "Ideally, in hindsight, we would have devoted more time to Pilot Testing, but we were looking at a very narrow window for implementation".

HBR went from K4 selection to first issue implementation in four months, an aggressive timeline, that was made possible by the fact that they'd already made their InDesign transition and had templates that were well structured and in a state that would work well with K4.

Lessons Learned

When asked what the more challenging aspects of the project were, Ms. Lissy replies, "It's easy to underestimate the amount of hard work it takes to make a project like this successful. Ideally, we would want IT project management to be more involved in future projects—we tried to do as much on our own as we could".

Managing the debate, helping staff that may be nervous, or uncomfortable with change, and differences in learning curve all had to be factored into making the project a success. Creating a core group with representatives from each interest area that were willing to think openly about change was a key factor in pushing through the hard work.

Top Benefits

Since HBR's transition to the system, they, like most publishers, have had to deal with downsizing and reorganization. "The work we did together as a group and the process we implemented laid the groundwork for our overall ability to be more adaptable, so that we were able to respond quickly to other changes—we knew where our flex points were," says Ms. Lissy. Since implementation HBR has been able to cut more than three weeks from their overall issue schedule, and make their content more timely. Additionally, they feel that there's even more they can do, feeling on top of their workflow, and well-poised to respond to even greater change if needed.

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The Top Benefits Of This Implementation Were:

1] Parallel workflow allowed for significant reductions in issue cycles.

2] Copy editors now have much greater control over copy and layouts, and can edit directly within pages and write to fit.

3] Less paper-based editing and consumption, estimated at roughly 1/3 less.

4] Remote access capability has made it easier for staff to work from home or while traveling, and for remote/freelance staff to be incorporated into the workflow.

5] Potential to export content directly to XML.

Harvard Business Review continues to actively evaluate their processes and content possibilities, planning exciting new offerings for their audience, with continued strengthening and reshaping of who they are and what they offer the leading businesses in the world today and tomorrow.

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helps publishers work smarter and faster by solving content, process, and technology problems. Learn how at *www.tech4pub.com*.