

Welchman *Pierpoint*

Special Topic:

Web Governance and Standards Compliance

Contents

1	Introduction	1
2	What Is Web Governance?	2
	What Web Governance Means for the Organization	2
3	Web Governance Framework	3
	What a Web Governance Framework Means for the Organization	3
	Key Concept: Inputs & Decisions	4
4	Web Policy	4
	What Web Policy Means for the Organization	4
	Key Concept: Policy Review	5
5	Web Standards	5
	What Web Standards Mean for the Organization	5
	Key Concept: Web Standards Range	6
6	Web Standards Enforcement - People, Processes, Tools	6
	Standards Definition	7
	Standards Dissemination	8
	Standards Implementation	8
	Standards Measurement	9
7	Conclusion	10
8	About WelchmanPierpoint	11
9	About Vamosa	12

Introduction

Over the last 15 years, the Web has fundamentally changed the way organizations operate. From its simple beginnings, the use of the Web now extends from public-facing Internet sites to knowledge-sharing, employee-focused Intranets, partner-oriented, limited-access Extranets, and the newer collaborative domain of social media. As the Web function continues to broaden, it requires the same management accountability mechanisms and controls that support and govern other aspects of business.

The notion of corporate governance is not new. Many organizations have formal governance over core functions such as IT and finance. But the idea of Web Governance can sometimes appear to counter the freeform, organic Web development culture that helped moved the Web from a curiosity to a mission-critical business tool. In the past, the Web gained traction partly because of unbridled growth. Content, data, and applications were ported to the Web without first establishing standards, development, and publishing protocols. Now the same unchecked growth and lack of standards creates risk as the Web presence degrades amidst a cacophony of un-orchestrated development practices.

The Web is simply too mission-critical to operate in an ad hoc or informal manner. In order to effectively align the Web with strategic objectives, formal Web Governance must be established and mechanisms to enforce standards must be incorporated into day-to-day operations.

What Is Web Governance?

Web Governance is the authoritative administrative structures that set policy and standards for Web product management. It includes:



Figure 1: Web governance stakeholders

In combination with strategic leadership from the executive level, mature management of the Web division, and comprehensive Web measurement practices, Web Governance is one of the core dimensions of a mature Web operations approach. It helps reduce Web development risks by establishing clear Web decision-making authority, extending Web accountability to more senior levels of the organization, and improving Web Standards compliance.

What Web Governance Means for the Organization:

Web Governance refers to the way people make decisions about the organizational Web presence. It determines who gets to sit around the table when those decisions are made and who has final decision-making authority when consensus cannot be achieved through discussion. Web Governance also includes 1) writing Web-specific policies that will reduce risk to the organization and 2) forming appropriate teams to write the Web Standards that will raise the quality of the organizational Web presence.

Web Governance Framework

The Web Governance Framework specifies the organizational mechanisms through which Web Governance-related policies and standards are set, maintained, and enforced. Ideally, the Web Governance Framework should be emplaced by a formalized mandate from senior management and should be integrated with existing governing bodies, if appropriate. A Web Governance Framework specifies who provides inputs and who makes decisions related to the various aspects of Web operations, from non-technical communications-focused concerns (such as the design of Web sites) to highly technical issues (such as load balancing and network security).

What a Web Governance Framework Means for the Organization:

Having a Web Governance Framework helps minimize and settle internal Web site ownership disputes. It can also smooth the relationship among Marketing Communications, IT, and various departmental Web stakeholders. This stability turns the focus to managing Web sites instead of arguing about them.

Because the framework holds senior, strategically-focused organizational leaders, mid-level program and line of business managers, and Web subject matter experts, it provides a structure to align the strategic and tactical needs and concerns of the organizational Web presence. This alignment ensures that the management of the Web is properly orchestrated and is conducted in accord with both organizational needs and Web site users' needs.

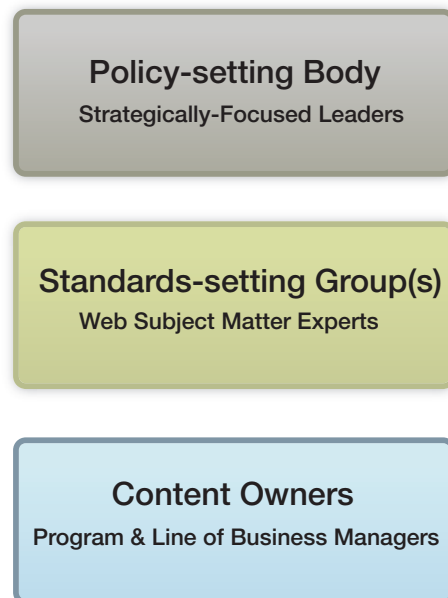


Figure 2: Basic components of a Web governance framework

Key Concept: Inputs & Decisions

A Web Governance Framework specifies who in the organization is required to give input and who ultimately makes decisions about the Web Policy and Standards. Without formal governance, confusion exists over who has the right to make decisions about Web editorial, structural infrastructure, and technical concerns. This uncertainty leaves the organization exposed to silo'd efforts, stalemates, or in-fighting, which in turn manifests itself as inefficiencies in the execution process. This ineffectiveness can stall or stop Web initiatives.

There are some best practices for establishing inputs and decision mechanisms in an organization. As a general rule, receiving **a lot of input** from various stakeholders is helpful. This contributory influx ensures that a broad organizational perspective informs policy and standards. Further, the input process frequently quells some of the resistance that can arise when newly codified policies and standards are enforced.

Conversely, **decision-making should be narrowed** to a single organization or functional area that is run by subject-matter experts who are qualified by their expertise and knowledge to make well-informed decisions that will serve the best interests of the entire organization.

Web Policy

Web Policy

- Mandates that define what we must do in regards to the Web

Characteristics

- Are about the organization
- Created to protect the organization from risk
- Set by senior leadership
- Affect the entire organization
- Few in number
- Change infrequently

Web Policy refers to a set of legal, compliance-related, editorial, and technical constraints for Web development. A mature approach to establishing Web Policy considers the full range of Web-based interactions an organization can have with the world. It also considers what constraints and practices may need to be put into place to protect the organization from risk and to ensure that the organization is in compliance with any relevant regulatory concerns and is otherwise operating within the bounds of the law and good practices.

What Web Policy Means for the Organization:

Web Policy guides the organizational Web team by putting the constraints of Web development into place. These constraints are mandatory, meaning that all who develop content, data, and applications for the Web must abide by them, regardless of whether those developers are part of an in-house Web team, are members of an outsourced vendor team, or are casual contributors to the site via interactive software. Web Policy is best set at a fairly senior level of the organization with the guidance of key senior Web subject matter experts.

Web Policy should integrate with existing organizational policy so the two are complementary. This integration may involve examining and rewriting an existing policy. For example, a Web records management policy that defines what constitutes a Web record should be in alignment with the organization's existing records management policy as it relates to paper and electronic records.

Key Concept: Policy Review

Organizational policy that was crafted prior to broad use of the World Wide Web, **including those concerns not necessarily related to the Web**, should be re-examined in light of the Web. For instance, HR policy will need to be redrafted to account for implications that have arisen from the use of social media channels.

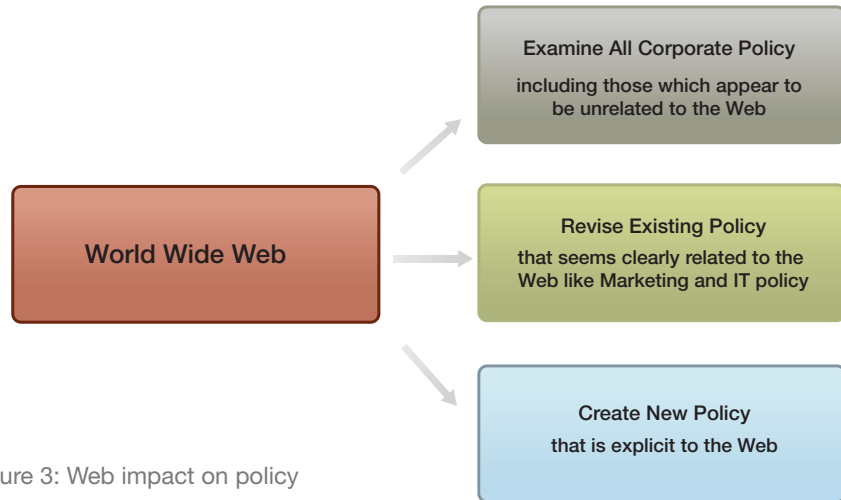


Figure 3: Web impact on policy

Web Standards

Web Standards
<ul style="list-style-type: none">• Statements that define how we will accomplish policy mandates
Characteristics
<ul style="list-style-type: none">• Related to the quality of Web presence• Created to support quality execution• Set by subject matter experts• Impact Web publishers• Many in number• Change frequently

Web Standards describe specific parameters, limits, and exceptions for the development of Web products. They provide explicit protocols to be used by those who are creating content, data, and applications for the Web. Web Standards should cover design and editorial, information organization and access, Web tool and application, and network and server infrastructure concerns. Standards differ from 'guidelines' in that they must be adhered to. They also differ from standard operating procedures in that they do not specify deep methods or workflows that may be utilized when developing for the Web.

What Web Standards Mean for the Organization:

Having a codified and enforceable set of Web Standards helps raise consistency and quality, both of which can contribute to a better user experience. Complete Web Standards also improve the internal Web development environment by reducing the opportunity for conflicting editorial, structural, or technical approaches. The practice of establishing Web Standards provides an opportunity to bring together often competing Web stakeholders in a forum where disparate needs and production practices can be aired, aligned, and replaced by a consistent and effective set of benchmarks. Web Standards are best set by a team of Web experts with informed input from all organizational Web stakeholders.

Key Concept: Web Standards Range

In order to manage a Web presence effectively, the Web team must define and implement a full range of standards for the Web—from **non-technical design and editorial standards** that are generally the concern of communications and marketing to **technically oriented standards** related to network and server infrastructure that are generally the concern of the information technology (IT) team. A full set of Web standards also includes standards that have either come into existence or come into prominence because of the Web such as, information architecture and Web applications development.

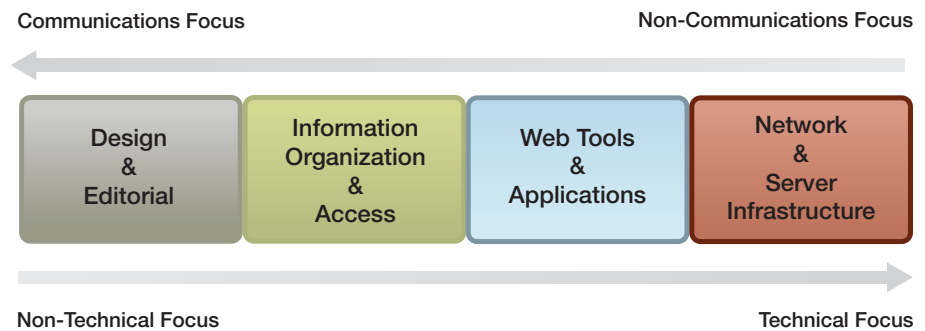


Figure 4: The range of Web standards

Crafting Web standards in the Information Organization & Access and the Web Tools & Applications categories requires the expertise of both communications experts and technology experts. Academically speaking, however, even the most technical requirements, such as the rate at which content is replicated across servers globally, require input from the non-technical teams by the way of a requirement. Similarly, non-technical standards, like the graphical look and feel of a Web page, may need to be informed by input from technical resources regarding page load time performance.

The use of the Web to support business functions has created the need for a more intimate and collaborative touch point between Communications and IT. If operating outside the bounds of a clear governance framework, this touch point is likely weak or contentious and consequently standards are non-existent or un-even and therefore difficult to enforce.

Web Standards Enforcement - People, Processes, Tools

Web standards set the parameters for a quality Web presence, but enforcing them across complex sites with multiple contributors can be difficult. Most Web sites are simply too large and unwieldy to be monitored and controlled through a manual editorial process.

Furthermore, effective enforcement is not a one-off exercise. Instead, it is incorporated throughout day-to-day Web operations. Enforcement starts with the creation of a set of standards followed by dissemination, implementation and finally measuring for compliance.

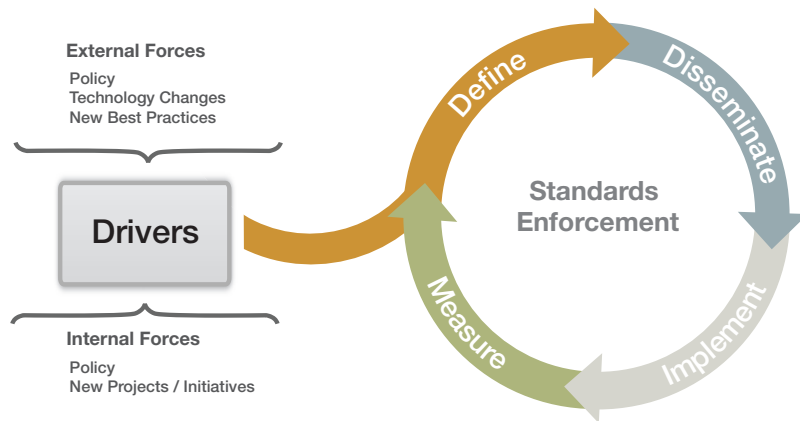


Figure 5: Web standards enforcement activities

It takes coordination of people, processes and tools to effectively complete each enforcement activity. The tables below identify the people involved in each activity, processes that are typically part of the activity and a set of tools, which can enable the activity.

Standards Definition:

Enforcement of Web standards begins with their definition, ideally by a cross-functional team of business stakeholders and Web experts. Through this collaborative process, participants have a clear understanding of the standard and its rationale. Furthermore, it is more likely that a Web standard will be implemented successfully if internal stakeholders had a hand in its formation.

Table 1: Standards Enforcement – Define

People	<ul style="list-style-type: none"> • Cross-functional team of business stakeholders • Web experts (such as IA's, taxonomists, designers, etc.) • Communications • IT • Functional experts (such as librarians, records managers or legal)
Process	<ul style="list-style-type: none"> • Input • Articulation • Approval/codification
Supporting Tools	<ul style="list-style-type: none"> • Knowledge Management software • Collaboration software • Intranet • Wiki

Standards Dissemination:

The next step in enforcement is dissemination of standards. People can't implement standards if they don't know about them. Without effective communications, they can become 'shelf ware,' sitting in a binder or a forgotten section of the Intranet and therefore never fully implemented. Standards should be disseminated to all stakeholders (managers, content contributors, Web staff and vendors) along with guidance on how to implement them.

Table 2: Standards Enforcement – Dissemination

People	<ul style="list-style-type: none">• Web execution teams – including internal staff and vendors• Communications staff• Trainers• Site owners/managers
Process	<ul style="list-style-type: none">• Creation of style guides, FAQs, etc.• Publication• Training
Supporting Tools	<ul style="list-style-type: none">• Intranet• Wiki• Email

Standards Implementation:

Implementing standards can be relatively simple, like using a cascading style sheet, or complex, such as building a custom application. Regardless, the key to successful implementation is making sure you have an execution strategy that defines exactly how the standard will be implemented. It should include details about staffing, budget and time requirements for implementation and describe the process for meeting those requirements. Providing stakeholders with a detailed execution plan ensures the implementation will be consistent and not simply a mandate that can be ignored or misinterpreted.

Table 3: Standards Enforcement – Implementation

People	<ul style="list-style-type: none">• Web execution teams – including internal staff and vendors• Content contributors• Site owners / Managers
Process	<ul style="list-style-type: none">• Consider user permissions• Workflow definition• Content quality control• Application development cycle
Supporting Tools	<ul style="list-style-type: none">• CMS• Taxonomy Management• Search

Standards Measurement:

But even in the perfect world, where an organization has defined, disseminated and implemented standards well, there is the challenge of ongoing quality. Organizations should develop processes and tools to measure standards compliance. While thoughtful implementation of standards can mitigate the risk of standards violation, it cannot completely eliminate the possibility. Therefore, ongoing monitoring and remediation is required to ensure quality.

Depending on the complexity of the site, manual processes can be too laborious to be effective. Organizations should consider ways to automate the review and remediation of violations in areas such as:

- Template usage
- Accessibility
- HTML
- Branding/logo usage
- Link integrity
- Metadata
- Copyright

Using automated processes can ensure objective reviews and frees up staff resources to focus on content development.

Table 4: Standards Enforcement — Measurement

People	<ul style="list-style-type: none">• Web execution teams – including internal staff and vendors• Site owners/managers
Process	<ul style="list-style-type: none">• Training and certification• Audits
Supporting Tools	<ul style="list-style-type: none">• Monitoring and remediation• Search• CMS

Conclusion

Formal Web Governance allows individuals to understand their role as it relates to Web decision-making, policy creation and standards enforcement. It reduces the potential for silos, stalemates, and disputes and enables collaboration by setting the foundation for efficient execution of Web projects and initiatives. As a result, it also reduces redundant efforts and technology misalignment.

Having an eye towards standards enforcement when establishing governance procedures keeps enforcement from being an after-the-fact consideration. Enforcement begins with the definition of a full range of standards followed by dissemination to all stakeholders, careful implementation and finally measuring for compliance.

About WelchmanPierpoint



WelchmanPierpoint has defined the field of Web Operations Management, a discipline which identifies the root causes of your Web problems and provides a plan for solving them. We know effective Web sites start with sound Web operations, and understand the challenges inherent in managing a cross-functional information channel. Since 1999, we've helped clients establish models that position the Web site as an integral, strategic component of the organization based on the four components of Web Operations Management: strategy, governance, execution, and measurement.

Our consulting services focus on:

Web Governance

- **Web Governance Plan** - An in-depth assessment of the organizational decision-making patterns that affect your Web presence and recommendations for improvement.
- **Web Governance Scorecard** - Rates your risk level in Web governance and provides high-level recommendations for improvement.
- **Web Governance Workshop** - Learn best practices, discuss your organization's decision-making processes and draft a governance framework.

Web Operations Management Analysis and Planning

- **Web Management Plan** - Pinpoints the specific causes of your Web problems and how they impact your Web properties and provides a long-term plan for strengthening your Web Operations.
- **Web Management Scorecard** - A risk assessment of your current Web Operations with high-level recommendations for improvement.
- **Web Operations Management Workshop** - We'll teach you web operations best practices and you'll learn how to identify and address your organization's Web operations pain points.

Web Execution

- **Web Execution Plan** - An in-depth analysis of your current Web team structure that identifies strengths and weaknesses and provides recommendations for improvement.
- **Web Execution Scorecard** - A basic risk assessment of your current Web team with high-level recommendations for refining your Web execution functions.
- **Building an Effective Web Team Workshop** - Learn about the range of the organizational Web team, identify gaps in Web team expertise, clarify team roles, and draft a new Web team structure for your organization.

About Vamosa

Vamosa is a sector-defining software and solutions company specializing in the emerging area of Enterprise Content Governance (ECoG). Recognized as a global leader in ECoG, Vamosa is the only company that offers an integrated suite of products and services to manage the end-to-end process of discovering, transforming, deploying and maintaining content quality. Our solutions allow the world's largest enterprises and governments to analyze, enhance, standardize, monitor and maintain all forms of business content within a policy-based infrastructure of best practice methods.

Organizations with Vamosa's ECoG solutions benefit from improved regulatory compliance, enhanced knowledge management and a lower Total Cost of Ownership (TCO) for content management. We have provided solutions and consultancy for content discovery, cleansing, migration and maintenance to some of the world's largest enterprises and government departments – including Cable & Wireless, Vodafone, IBM, Oracle and Volkswagen North America.

Vamosa has quickly established itself as the sector-defining ECoG provider. Large multinational companies and government organizations in Europe and North America are relying on Vamosa to solve content quality challenges.

Our unique solutions for both documents and web content include:

- **Vamosa Content Analyzer** - enabling organizations to gain a clear understanding of their current content inventories and content management activities
- **Vamosa Content Cleanser** - for enhancing content by automating classification and tagging while removing duplicates and managing version control
- **Vamosa Content Migrator** - for simple, automated, web content and document migration
- **Vamosa Content Quality Builder** - a high performance rules based content transformation engine to address complex content quality process challenges
- **Vamosa Check and Fix** - the world's only web monitoring tool that also fixes problems automatically, for guaranteeing governance, accessibility and brand monitoring
- **MetaPoint** - which tags document content in an MS Office/ SharePoint environment at the point of publication ensuring that it is readily found, shared, and stored according to corporate information management guidelines
- **Vamosa Expert Services** - to ensure industry best practices are tailored to the unique needs of every business

Welchman*Pierpoint*

WelchmanPierpoint

6115 Falls Road, Suite PH2
Baltimore, MD 21209
USA
info@welchmanpierpoint.com

Tel. +1 410-377-3012
Web. <http://welchmanpierpoint.com>



Europe

Glasgow

1st Floor, Ailsa Court
121 West Regent Street
Glasgow G2 2SD

Tel. +44 (0)141 574 2500
Fax. +44 (0)141 574 2501

London

Regents Place
338 Euston Road
London NW1 3BT

Tel. +44 (0)207 544 8661
Fax. +44 (0)207 544 8401

North America

Boston

4th Floor
470 Atlantic Avenue
Boston MA, 02210

Tel. (617) 273 8398
Fax. (617) 249 0461

New York

19th Floor
5 Penn Plaza
New York, NY 10001

Tel. (646) 378 2269