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CHAPTER

Cataloging Audiences

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An *audience* is a group of people that is defined by both a common set of traits shared by its members, and by your decision to deliver value to that group in the form of content or functionality. In this section, I discuss the idea of audiences from the perspectives of marketing, software development, and writing. I discuss how you may go about segmenting users into audiences, and then I detail the information that you need to capture about each of your audiences so that you can deliver the best content to them.

It never ceases to amaze me how much lip service people pay to understanding their audiences and how little real effort they put into doing so. I've never run into someone who disagrees with the statement "You must understand who you're serving if you're to serve them well." On the other hand, I know of precious few who do anything more than a cursory analysis of those they intend to serve.

Cataloging Audiences Jumpstart

This Jumpstart summarizes what you need to do to include localization in your CM process and system.

Use this jumpstart as a summary without the weight of detail, or as a quick review if you've already read the chapter and want a checklist of what you need to do localization.

To analyze your audiences you can follow these steps:

1. Define your potential audiences. If your organization doesn't already have a well-defined audience document, expect to spend several iterations refining your audience definition with key stakeholders.
2. Refine your list of audiences. Determine how the CMS can help you serve each audience better and also reach your goals.
3. For each audience on your final list:
   - Identify them by giving each audience a name and charting the characteristics that describe it.
   - Describe their demographics using a narrative that explains the audience and how they benefit from your organization. Also include descriptive characteristics such as their jobs, technical savvy, and traditional demographics, as well as the size of this audience.

- Determine their attitudes, including their beliefs and opinions about the subjects of your content. Describe how you will establish credibility with the audience, what arguments will resonate with them, how to approach them effectively, and how much personal data you can gather from them.
- Understand how they will compare your offerings to competitive publications. Determine what publications (yours and others) the audience most commonly reads.
- Determine what you offer of value to them. Outline what benefits you offer and what costs you extract. Describe how you communicate this value equation to them and monitor it over time.
- Decide how they will use your information. Start by identifying their goals for each of the publications you target to them; next, develop use case reviews, test usability, and describe how you expect the audience to use each publication.
- Figure out what sort of profile to create for them. A profile is a collection of traits and trait values. Decide which traits you can use to categorize individuals and place them in the correct audience.
- Determine the localities that your audience encompasses. Localities take into account the local culture as well as the capability of your organization to provide content tailored to that locale. Include primary, constituent, and key localities in your description.
- Determine the tasks that you must do on an ongoing basis to accommodate the audiences that you identify. These tasks can range from periodic review of audience definitions to monitoring their activities via site logs. You might also review competing publications and do periodic usability and use case reviews.

4. Relate your audiences to the other entities in your analysis. Be sure, above all, that by serving them with the information they want you are able to advance your goals

After you've identified and described your audiences, you can use the traits to serve as the user profiles on which you can build your personalization module.

Serving versus Exploiting an Audience

At the same time as you want to serve your audience, you also want to get something from them. The more that you know about people, the better you can anticipate their needs and provide them with just the right content. On the other hand, the better you know people, the more you can manipulate them into doing what you want them to. (Usually, you want them to buy something.)

This paradox plays out on both sides of the computer screen. Users expect the Web sites that they visit to be smart enough to anticipate their needs. They gravitate toward sites that seem to know them and remember their preferences. On the other hand, users are wary or even hostile toward sites that ask a lot of questions. The question immediately comes to mind: "What are they going to do with this information?"

Direct marketers live by the creed of "Know thy audience." They collect as much information as possible on you and then carefully craft a message that they think you may respond to. Direct marketers live and die by the lists of targeted audiences that they create. Marketers walk that very thin line between serving their audiences and exploiting them. And, very interestingly, the line isn't a sharp one. Consider the same piece of junk mail sent to two neighbors.

The mail is a flyer advertising a long-distance telephone plan. Neighbor A has a plan and is happy with it. She feels put upon and manipulated and says, "I hate all these advertisements trying to get me to buy something!" Neighbor B just moved in and has been researching long-distance phone plans all day. She looks with interest on the ad and says, "How fortuitous to get this today. I wish that every phone company had sent me one."

However thin and imprecise the line is between service and exploitation, a line still exists. And in your own publications, you can choose to cross it or not.

Note For the record, I forbid you to use any of the techniques that I mention in this book to manipulate or behave unethically toward your audiences!

Content Mismanagement

In an inner-city elementary school a few years ago, there was a librarian who kept books from children and children from books. The librarian didn't teach children how to use libraries, they were not made to feel at home, and their curiosity was not welcomed. The library shelves were almost naked, but the librarian stood in the way of parents and teachers who were trying to get more books.

A working library includes book checkout, return, and a functioning catalogue so a student can learn to get from subject, author, or title to a book on the shelf. This library had none of those; and students, even teachers, couldn't predictably find a book without asking the librarian. The books on the shelves didn't match the catalogue; the numbers swung wildly, as did the alphabet.

The librarian used a "personal" system instead of the system used at other schools and libraries. When asked how students were to locate books in his system, the librarian answered, "Every library has its idiosyncrasies and the children know mine." Even if that were true, is the purpose of a school library for students to learn a unique and idiosyncratic system or conventional library skills that can be used in other libraries and throughout their lives?

The librarian kept many books locked away out of the general collection, and most new books never got put on the shelves. As a result, even the school PTA stopped donating books to the library.

The librarian repeatedly stated, "I will not change," and that rather than alter his system in "my" library, he would forfeit funding to get books—and in fact he did so. Teachers' objections weren't able to change the librarian's ways, so most classes didn't use the library. Instead teachers kept limited book collections in their classrooms.

Many children were robbed of irreplaceable time and precious opportunities. Each day was an irredeemable loss to children who pass this way but once.

It's already a struggle for kids to get a decent education. There can be no waste of scarce resources. But this librarian was not forced out; he left in his own time, only when he became eligible for retirement.

In this century we have learned the hard way that "evil flourishes when good people do nothing." When children are deprived of tools for understanding the world because a school library is run as the librarian's private kingdom, and nobody can or will do something about it, something is terribly wrong. A great deal of content is being tragically mismanaged.

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I believe that the key to staying on the right side of the line between service and exploitation is to place a value proposition at the base of your audience analysis. For each audience that you expect to serve, you must decide what its members want from you and what you want from them. Then make sure that the equation is balanced. If you're willing to give as much value as you expect from your audiences in return, the relationship involves no exploitation. Your value propositions can serve as the guiding principles behind every other part of how you work with this audience.

What Is an Audience?

Audiences are simply groups of people that you choose to serve in some way. The first natural question to answer is, "How do I know someone who's in my audience from someone who's not?" The answer is to find the set of traits that distinguishes this audience from others and then figure out whether the person in question demonstrates these traits.

A *trait* is a specific characteristic of a person that you can discover, store, and combine with other characteristics to *know* this person. For you, a person, to know another person is one thing. For a computer to *know* a person is quite another. For you or me, a person isn't some set of data points; she's a complex being whom we intuitively "get." You say that you know someone if you can recognize her and can accurately predict what she may do, say, and want.

No computer that I know of can "get" a person in this sense, so you better settle for something less. You can settle for coming up with a few isolated traits and using them to try to predict wants. And, amazingly, that approach basically works. In most of the circumstances that you face in a CMS, you can limit the number of potential wants that you serve. You can also draw wide enough distinctions between your users that determining who's who and what they probably want isn't too hard. As you learn to discern more traits more accurately, you can continue to get better at predicting more wants for more people.

Although many disciplines talk around or about audiences, I've never seen the concept nailed down enough to become specifically useful in the context of a CMS. So in the following list, I try to draw the elements of *audiences* out of the three different disciplines in which I've seen the concept operate. My goal is to piece together a use of the term *audience* that you can apply very specifically to a CMS:

✦ **From the discipline of writing and oral communication:** I draw the idea of audience analysis, which tries to define what you need to know to "speak" to a particular group of people.

✦ **From marketing:** I draw the notions of segmentation and profiling, which tries to tie groups of people together by using data about them.

✦ **From computer science:** I draw the notion of the user as a kind of person that an application must serve psychologically and ergonomically.

From these three bases, I construct the set of data that you can gather to understand, serve, and be served by your audiences.

Audiences and communicators

Writers, public speakers, and other communication professionals have used the concept of an audience analysis for a long time. A lot is written on this subject, appearing in textbooks and the popular press. Most of the work that I've seen boils down to the following seemingly simple points:

- Who are these people objectively? What are their ages, interests, jobs, and other relevant data?
- What does this audience already know and believe about this subject?
- What are people's needs and desires for new information in your subject area?
- What kind of presentation style are they likely to respond to favorably?
- What publications do they already trust, and to which are they likely to compare yours?
- What's the author's relationship to this audience? Is she a peer, an expert, or an outsider?
- How do you establish credibility with this audience? What do audience members consider good information sources, arguments, and examples?
- What tasks and purposes do your audience members have in mind as they approach your material?

This sort of analysis has motivated communicators from the ancient Greek rhetoricians to the modern technical writer and journalist. I believe that it's a pretty good list of the sorts of information required to understand how to communicate with an audience. Most of the time, you conduct this analysis quite informally, and it results in an intuitive feel that gives the communicator a sense of how to approach an audience. For a CMS audience analysis, you can make the answers to these questions explicit and relate them to the parts of the CMS that they're going to help structure.

Audiences and marketing

I rarely hear marketing people use the word *audience*, but I hear them talk about target markets all the time. A *market* itself is a group of people with common concerns that motivate their behaviors — basically, it's an audience. Within the broad market that an organization serves are market segments that consist of subgroups with identifiable traits and targetable needs.

Marketers are getting more and more precise in how they construct and manage segment data and how they target individuals. Today's merchandizing and campaign-management systems are very sophisticated in the ways that they divide people into categories (or segments) based on the data that they can collect or acquire. These systems match profiles to the materials that each group is to receive. *Profiles* are sets of traits and trait values that you can group together to define a kind of person.

Note Traits are another form of metadata. They consist of data *about* a person.

Traits such as age, sex, interests, pages viewed, job type, and time on the site, for example, may be at your disposal and you can use them to define segments. You may create a segment that you call *Info Addicts*, for example, that consists of males between the ages of 16 and 25 who spent a lot of time on your site. Based on the age and sex of a visitor (which you ask or otherwise obtain) and the time that visitor spends on the site (which you measure), you can determine who is and who's not an Info Addict. Of course, the next question is, "So what?" What do you do differently with an Info Addict than with any other visitor?

Marketers use segmentation information to understand and speak to a market segment. They may design an ad campaign, for example, to reach these info addicts and draw them to your site. The kind of advertisements that Info Addicts receive are different from those that a segment that you call, say, *Casual Browsers* receives.

You can use this same approach in your CMS to identify audiences and target content to them.

Audiences and users

I've never heard programmers use the word *audience*; but as they talk about users, programmers are using the same concept. *Users* are the consumers of computer applications.

Users access an application through a user interface. To be successful, a user interface must be usable. Usability testers recruit representatives of user groups and watch them use the application to see whether it works well for them. What are these user groups if they're not audiences?

Today's hot design process *Unified Modeling Language* (*UML*) makes the link to audiences even more tangible. Programmers use UML to model the way that you use an application before they put any effort into programming it. UML defines roles as the types of people who're likely to use an application. In UML, you create a set of *use cases* that define what a type of person wants to accomplish and how you can expect her to go about accomplishing it.

For an electronic publication, audiences are users. In fact, I call audience members *users* throughout this book as I discuss people interacting with Web sites and other electronic publications. Thus application usability, user groups, and use cases apply literally to much of what a CMS produces.

In fact, I carry the notions of usability and use cases forward into my discussion of CMS audience analysis. As part of the audience analysis that you do for a CMS, you can define a set of use cases and usability concerns for each audience.

How many audiences do you have?

The Web gave rise to the notion of "one-to-one electronic marketing." The idea is to use technology to reach out to each person and serve that person individually. The computer, many believe, can know you and serve you the way that the corner grocer used to. Personally, I can't imagine a computer leaving me with the same feeling as the retailers of my youth. But personality aside, is an audience size of one obtainable in your organization? And if it's even technically feasible, is driving toward that much segmentation advisable?

First, you need to determine what level of audience segmentation *is* feasible. Considering that most publishing systems in use today don't have any notion of audiences (that is, they serve one conglomerate audience), you may be best off by beginning modestly. You may ask, "What's the smallest number of audiences that we can divide our users into and still derive tangible business benefit?" Or you may ask, "What audience segments does everybody agree on today?" or even, "Can we latch onto one or two traits to use to divide our users into just two segments?"

Regardless of how ambitious your approach is, the following things are sure:

✦ You need at least a few cycles of defining and refining audiences before you can know for sure that you have it right. If your organization's worked at this goal for a while, you can perhaps say right now who your key audiences are. If not, expect to start somewhere and continue to refine toward a stable set of audiences.

✦ Your audiences change over time. Not only do your segments get smaller and smaller, but you also begin to expand toward audiences that you may not have been initially prepared to serve or that present themselves as good opportunities to broaden your constituency.

Second, what level of audience segmentation is desirable? One-to-one marketing would have you believe that you should aim to serve segments of one: You should know each person as an individual and target each one personally. Supposing that this task is even feasible — that is, that you can put in place the technology to accomplish it — I'd question whether it's generally desirable. What does having audience segments of one really do for you? Most argue that the benefit lies in increased loyalty and a better sense of service and trust. Maybe so, but it comes with a cost as well, as the following list describes:

✦ **Content differentiation:** Can you segment and tag your content so thoroughly that it's different for each person who receives it?

✦ **Traits:** Can you create and maintain user profiles that are rich enough to differentiate every user?

✦ **Leverage:** Do you want to forgo the capability to develop messages with wide appeal and leveragability over a large number of people?

The whole concept of one-person audiences flies in the face of audience analysis. Authors don't create different content for each person. They create different content for each *kind* of person. It contradicts, too, the basic idea that organizations serve constituent groups and not isolated individuals. They craft value (products, services, information) that appeals to a *kind* of person and not to an aggregation of lone individuals who are more different than the same. So if the extra work of very small audiences doesn't stop you, the lack of real value to your organization may.

On the other hand, in some cases, certain aspects of one-to-one marketing do work: identifying users, for example, and then providing them with their purchase history; or, as Amazon.com does, sending e-mail messages announcing books that may interest a reader based on past purchases. In this last example, conceivably no two people receive the same series of e-mail messages.

Audiences and Localization

Localization is the process of making content as understandable as possible in the variety of cultures that view it. Most simply put, if you want people from more than one culture to use your content, you'd better think about localization.

Communication is at the center of a CMS. How you communicate depends a lot on the culture of the person with whom you're communicating. Thus a CMS that communicates well with people of various cultures has localization at its core. As central as localization may be, however, I've rarely seen it at the core of a CMS. Rather, it's normally at the periphery and is most often an afterthought. Why? Following are two reasons:

✦ **Ignorance:** Unfortunately, many people simply don't understand enough to know that localization is a core issue of a CMS. Either they believe that users take on the burden of understanding the language and conventions of the native culture of the organization; or they think that simply translating some of the text of the system as an afterthought is enough. Especially in the United States, but clearly in every country to some degree, an ignorance of the need for localization has helped prevent localization's wide-scale application.

- **Difficulty:** Localization is hard. It adds a lot of complexity to an already complex system. Variations in language and especially variations in content structure combine to drive up the effort and, in turn, the cost of a localized CMS.

In a rapidly globalizing world, staying ignorant of the need to localize for very long is difficult. And indeed, over the course of my time in the computer-information field, I've seen the consciousness and understanding of localization grow from a few voices to a full discipline and industry.

A CMS can't help you much in raising the consciousness of your organization about the need to localize, but it can deal quite effectively with the difficulty of localization. You can hand off a lot of the effort and organization that surrounds localization to a CMS. A CMS can organize the localization effort, but it can't do the localization. That requires people. So, although a CMS can make localization a lot easier, it remains an expensive and slow process.

Note

I claim no great expertise in localization. I've seen more aborted attempts at localization than I have successes. So my goal in this discussion isn't to present a comprehensive account of localization or to survey the current trends, but rather to present a set of concepts and vocabulary around localization that I can weave into the fabric of my wider discussions of content management.

What is localization?

Localization is the process of making content as understandable as possible in the variety of cultures in which people view it. I'm going to work back from this definition to one that's more useful in the context of a CMS.

The definition has the following three major concepts:

- **Culture:** I want to keep this very complex issue as simple as possible and define *culture* as a set of shared communication and behavior standards that a group of people adopts and upholds. Not all that long ago, geography was the main indicator of culture. People who lived near each other shared a culture. Today, that's too simple a way to look at it. As anyone who's walked down the street in any major city of the world can tell you, cultures aren't countries. Today, I'd define *culture* as a dynamic mix of language, region, ethnicity, and other affiliations. However, to stay within the general bounds of the accepted localization terminology, I use the word *locality* and not *culture* to capture the concept of localization. This has validity in the software development (and larger business) world, where often local subsidiaries of a company are responsible for handling the marketing of company products for their locality.
- **Understanding:** What makes content as understandable as possible? Clearly the language in which you write any text is the biggest factor. But it's not just language. As I discuss in the following section, translation is only the start. You must recognize and change a world of other, more subtle local conventions.
- **Process:** Localization is a process. In fact, I'd say that, by and large, it's an authoring process. The content that someone authors for one locality, someone else must then reauthor for another. The localization process encompasses many mechanical parts, where bits of content move from person to person for processing. But after the content arrives on the localizer's screen, the mechanics end and it becomes a human process of knowing what *works* in one locality or the other.

So, for the purpose of a CMS, I define *localization* as follows:

> An authoring process in which you make the communication conventions of your content optimally understandable in the various languages, regions, and affiliation groups that you care to serve.

What are your localities?

A *locality* is a specific combination of language, region, and affiliations. Following are some examples of localities that illustrate the concept:

- ✦ **Turkey:** You define this locality by a region (Turkey). Regardless of the language that some inhabitants may speak, you use Turkish to communicate; and regardless of their ethnic or religious affiliations (Kurds, Moslems, and so on), you speak to them as secular Moslems. You would create this locality if you were opening an office in Istanbul.
- ✦ **Francophones:** You define this locality by language (French). Regardless of location (Africa, Europe, North America) and any other affiliations (citizenship, political persuasion, religion, and so on), you speak to this audience in French. You may create a locality such as this one if you discover that 30 percent of your product inquiries come from French-speaking people.
- ✦ **Social conservatives:** You define this locality by an affiliation. It includes people that may be offended by words or images that depict the human body or allude to sex. You may create this locality to acknowledge the fact that half the people who visit your Web site come from regions or religions where conservative mores prevail. Regardless of the language that they speak or the region where they live, you speak to these people without sexual words or images.

I choose the preceding three examples not because they're common ways that people localize, but to make the point that a locality isn't always a language. For you to consider it a locality, a group of people must share a set of communication assumptions that you care to cater to.

Given the amount of work that catering to communication assumptions involves, you're unlikely to create a locality for every group that you may discover. Rather, you identify the following types of localities:

- ✦ **A primary locality:** This type is the default locality for your content. The most popular primary locality today is International English. This locality assumes a fluency in the English language but tries to use no expressions or styles that are idiomatic to a particular region where English is spoken.
- ✦ **Constituent localities:** These types are all the localities where you expect people to use your publications.
- ✦ **Key localities:** These types are the localities that you choose to actually serve.

To implement localization in a CMS, you group all the constituent localities into a few key localities. You choose the key localities to cover the widest set of constituents possible. The primary locality serves as the master content that you then localize into the assumptions of the key localities.

Note

I'm aware that the primary locality of this book is American Techno English. This locality involves the set of communication assumptions common to educated middle- and upper-class citizens of the United States who have a strong affiliation to the Web and electronic-publication communities. If you're not in this group, I apologize for making things easier for me and harder for you by using words such as Techno English.

Audiences and locality

Audiences and localities aren't the same concept. An audience certainly may all reside in a single locality, but an audience may also spread over a range of localities. I've heard some people advocate dividing each locality into its own audience from the start. The idea is that each locality exhibits such a different set of needs that it's necessarily a different group. Well, maybe, but then again, maybe not. I think that assuming that you always find big differences between localities is just as wrong as assuming that all localities are the same (which is the argument that people sometimes make to avoid localization altogether).

The chief lesson that audience analysis teaches you is not to assume anything but instead to find out. Your best bet, I believe, is to define your audience segments based on the content needs that you can identify and cater to. If those needs happen to divide people by language or regional lines, fine. If not, that's fine, too.

In any case, don't confuse localization with audience. A Spanish-speaking person in Chile may share more significant traits with a Russian speaker in Israel than with a Chilean in the next office. Just because one can't read Russian and the other can't read Spanish doesn't make them two audiences. It makes them members of two localities.

Different audiences get different content. Different localities get the same content in different ways.

Nonetheless, I choose the audience chapter as the spot for my major discussion of localization for the following good reasons:

- You direct most localization toward an audience.
- Localities often *are* audiences.
- A localization analysis shares much in common with an audience analysis.

What gets localized?

Obviously, the main event of localization is *translation*. Translating text and tracking your translations is a big job and may be all that you ever manage to do to localize your content. As part of the translation or, better, as a part of the original authoring of your content, however, you want to consider the following more subtle communication conventions:

- **Idioms:** These conventions are word uses that are particular to a locality. The phrase *on the fly*, for example, which I use frequently, isn't in general use throughout the English-speaking world and likely doesn't even have a good translation in many other languages. So to localize a phrase such as *on the fly* may require more than translating the words. It may require more than finding the corresponding expression in the other locality. It may require a reauthoring of the phrase to get its true meaning across in different localities.
- **Metaphors:** These conventions are phrases that use one set of circumstances to illustrate a similar relationship in another set of circumstances. In this book, for example, I discuss the "wheel of content management." The idea is that the relationships between content-management entities is similar to that of the relationship between the parts of a wheel. Does that metaphor make sense in all localities? I hope so! If not, a large section of this book needs reauthoring to fix the problem.
- **Connotations:** These conventions are the additional nuances of meaning that you ascribe to a word or phrase in addition to the main meanings that you find in a dictionary. Meanings are fairly standard, but connotations vary widely by locality. I choose

the word *component*, for example, to describe classes of content partly for its connotation to me. I remember creating a stereo system out of what are generally known as components. Each component is sold separately, but together they make a wonderful sound.

- **References:** These conventions are specific mentions of people, things, or events that you use to make a point. I frequently refer to Amazon (at `www.amazon.com`), for example, hoping that it's an example that's known to my audience regardless of locality. I suspect that I'm right, but then, I wouldn't know if I was wrong.

This list isn't exhaustive, but it gives you a feeling for the kind of conventions that localization involves beyond simple translation. To continue, I turn now to the *hot spots* (yet another idiomatic expression) of localization, as the following list describes:

- **Look-and-feel:** In publications, you spend a lot of time figuring out how to make your publications communicate certain emotions and intangible ideas. This area may be the most locality-bound part of a CMS. What color, imagery, sound, and text style communicates which emotion varies a lot from locality to locality. What in one locality says "elegant" may, in a different locality, say "bizarre!"
- **Messages:** These concepts are the key ideas that you want a user to take away from your publications. (See Chapter 26, "Designing Publications," in the section "Messages.") Messages are locality bound. The immediate message especially, which you communicate as much by look-and-feel as by words, may not map well between localities.
- **Tone:** A general tone (casual, formal, official, friendly, and so on) is often hard to replicate across localities without major reauthoring. In this book, for example, I try to maintain a casual and friendly tone. In some localities, such a tone may very well read as disrespectful or even comical.
- **Examples:** You use examples to bring a concrete and tangible reference to bear on an abstract concept. As references, examples are locality bound. Examples must address the experience of your audience but must also make sense to your various localities.
- **Illustrations:** You use illustrations to summarize complex concepts or capture the essence of the text around them. Aside from the fact that illustrations are technically much harder to translate, you can embed a lot of local context in illustrations that can make them confusing outside their locality of origin. I use a picture of a "standard" organizational chart, for example, to discuss information flow in the organization. (See Chapter 14, "Working within the Organization," in the section "Tracking Information Flow in the Organization.") If that "standard" chart is unknown in your locality, in no way does my illustration help you to understand the concept. In fact, it's likely to confuse you more.

Localization and content management

Localization and content management go hand in hand. In fact I'd go so far as to say that the central issues of localization are among the central issues of content management, as the following list discusses:

- **Collection:** How do you author or acquire content in a way that frees it from its context by explicitly stating its context? For localization, you make content free from its locality by tagging the parts that are locality bound. In content management in general, you make content free from any particular audience or publication by tagging the places that are audience- or publication-specific. In both cases, you're not trying to remove the context of the content but rather to explicitly state it so that you can formulate and implement logical rules for the use of the content. In a collection, for example, you can tag each example with the localities that it's useful for. You can develop alternative examples for your other localities.

✦ **Management:** How do you store and administer content in such a way that people can find, access, and most easily use it? In localization, the point is to deliver content to the localization team as efficiently as possible. Doing so may mean delivering only the examples that need translating to a particular language because you're tagging them for the locality that uses that language. In the wider content-management world, of course, management is responsible for delivering content to wherever it needs to go.

✦ **Publishing:** How do you ensure that the right content gets into the right publication in the right locations? In localization, this task is a matter of selecting the localized version of the content. You may, for example, want to make your CMS select and display only examples that you tag for the locality of the current user. In content management in general, of course, this concept is the central purpose of the entire publishing system.

Localization can come into play in any or all portions of your CMS design. Thus I leave the detailed discussion of localization analysis and design to the specific applicable sections throughout this book. I leave this section with the following two general principles of content management that apply especially well to localization, and I offer them as general guides to localization:

✦ **Conservation of work:** A CMS doesn't reduce the amount of work that publishing content takes; it merely shifts the burden of that work from a human to a computer. In localization, you want to adopt the attitude that your job is to put as much of the work as possible onto the CMS. You can, however, only shift it so far. If you want content that's useful to people, you can't escape that fact that people must do a core of the work.

✦ **Balance of generality:** The more general that you make your content, the easier it is to reuse. The more general it is, however, the less it communicates. You must balance a CMS between the constraints of reusability and strong communication. Similarly, you must balance the need to communicate at all with your key localities with your need to communicate well with your primary locality. Whenever I say, "on the fly," I tip the balance a bit toward my primary locality to give them deeper and wider understanding at the expense of other localities that may get less understanding.

Cross-Reference

For a view of how localization fits into the larger CM picture, see Chapter 39, "Building Management Systems," in the section "Localization System."

An Example Audience Set

As in all logical design examples that I provide, I use the nonprofit organization PLAN International as my semi-hypothetical example organization. For the sake of illustration, I assume that PLAN came up with the following set of key audiences (in order of priority) in their requirements-gathering process:

✦ **Members:** This audience consists of all those who join PLAN and pay a monthly fee to support a child and a community somewhere in the world.

✦ **In-country staff:** This audience consists of all those who reside in diverse locations around the world and need to know what's happening in the organization.

✦ **Donors:** This audience consists of all those who make major grants to the organization.

✦ **Press:** This audience consists of all those who learn about and provide publicity for the organization.

As I move through the description of audience analysis, I draw on these hypothetical audiences for examples.

Analyzing Audiences

In the sections that follow, I lay out a methodology for coming to understand the audience segments that you must create. In addition, I supply some logical design criteria that you can use to fully describe each segment. As I do with all the entities in your logical design, I break the analysis into questions to get you to think, methods that you can use to plan, and questions to help you integrate your audience analysis.

The key to finding the right set of audiences is to look within your organization to see how it divides constituents now in order to be sure that you're making the most of what your organization already knows. Find out how your organization communicates with each audience now and what feedback it receives from those audiences.

For each audience, you construct the set of personal traits (for example, age, interests, and so on.) that select a person into the audience. These traits later serve as the user profiles on which you can build your personalization module. To most effectively speak to each audience, you must create a set of assumptions about what members like and dislike (for example, what motivates, impresses, and offends them). You should find publications that they know and trust now and make sure that you're providing content that's consistent with their aims. These assumptions give rise to the metadata that you add to your content so that the people who want that content the most can find it and get it delivered to them.

After defining all your audiences, decide how they relate to each other to determine whether simultaneously serving the variety of audiences that you want is possible and to determine the kinds of metadata that most effectively capture the essential needs of each audience.

Think

To help you ease into the analysis, you can ask yourself and your organization the following set of questions:

✦ **Who is the primary audience?** Do you want to serve one group of people much more than the others? If so, how much are you willing to sacrifice the needs of the lesser audiences to those of the primary audience?

✦ **Do you have too many audiences?** Can you really expect to serve the range of people you've identified?

✦ **What are your current communications?** How well and in what ways are you in touch with your audiences now? Are they satisfied? What are the opportunities to increase satisfaction? Are any feedback channels established? If so, what feedback has come through?

✦ **Who are the key members?** Can you find members of key audiences to review your work as the project progresses and help you ensure that your CMS produces the right publications?

Plan

The following sections break your audience analysis into a set of design constraints that you should collect and account for from each audience you intend to serve.

Identification

Begin your analysis by charting the main identifying characteristics of your audiences. Come up with a response to the following audience design constraints to help you keep track of and rank your audiences:

- **ID:** Assign each audience a unique identifier so that you can later use it in the CMS for profiles and rules.
- **Name:** Choose a descriptive but memorable name for each audience so that the staff accepts the name and uses it consistently in conversation.
- **Rank:** Give each audience a priority rank. You rank audiences relative to each other if possible. (Members are priority one, for example, and in-country staff are priority two.) If you can't reach agreement on relative ranking, rate them all according to an external scale. (Members and staff are high priority, for example, whereas the press is a low priority.)
- **Key member:** For each audience, identify an exemplar to whom you can point as a concrete example of the group. The person may or may not be available to your group on an ongoing consulting basis, but you should at least meet with the key member once to get a solid feeling for what people of this audience are like. If your audience is in more than one locality, can you get a key member from each main locality?

Demographics

Beyond simple identification, you should study the kind of people you expect to be in each audience. The following constraints help you get to know the kinds of people who are in a particular audience:

- **Personal description:** Craft a short essay that gives someone who's never met any members of this audience a clear idea of who they are. The essay should give a sense of the kinds of people in this audience and what they stand to gain personally from an affiliation with your organization. Make sure that your entire team reads and agrees with the description.
- **Job description:** What kind of job (or jobs) do people in this audience hold? Do they all share similar job tasks or responsibilities? What can these people gain professionally from an affiliation with your organization?
- **Full size:** How many people in the entire world fit into the description of this audience?
- **Current size:** How many people who fit into this audience does your organization currently communicate with at all? How many do you communicate with on a regular basis?
- **Demographics:** What ages, sexes, races, regions, languages, and other such data describe people in this audience?
- **Localities:** In which of your localities do people from this audience reside?
- **Published data:** Are any sources of data on these people available for you to access?

✦ **Platforms:** What publishing channels can these people access? You can assume that they're capable of receiving print publications, but do they have e-mail? A fax machine? Personal digital assistants (PDAs)? Can they access the Web? If so, what operating systems, connection bandwidth, and Web browsers do they use?

✦ **Technical savvy:** How technically literate are these people? Specifically, what kinds of user interfaces are they comfortable with? What technical terms can you assume that they know? What functionality are they likely to accept and use? (Are they likely, for example, to do downloads? Installations? Transactions?)

Attitudes

Learning the attitudes that members of each audience are likely to hold toward your organization and content is an important task for you. From knowledge of attitudes, you can craft the appropriate messaging for each audience. The following constraints help you understand how the audience may react to your content:

✦ **Credibility:** According to Aristotle, the perceived credibility of the speaker is more important than what she says in determining whether she's convincing to the audience. How do you establish credibility with this audience? How much credibility do you have now with its members? Have you experienced any particular failures or successes in the past with these people?

✦ **Current beliefs:** What does this audience already know and believe about the subjects that your content addresses as well as about your organization? Are you reinforcing or trying to change existing attitudes? Do members have any particularly strong positive or negative beliefs that you need to take into account? Ask yourself, "What do people of this ilk trust, respect, like, know, and believe?"

✦ **Argument:** What do members of this audience consider good arguments and examples? Do they respond more to a logical or an emotional appeal? Must you cite certain sources or quote particular people for them? Can you leverage scenarios or examples that the audience has already heard of? (Maybe, for example, you can assume that PLAN's press audience has heard about and closely followed a recent famine. Can you cite information about the famine or otherwise use it as an example to show relevance to this audience?)

✦ **Style:** What tone and presentation style does this audience expect and respond to? Can you advance the expected style to a new level in a way that shows respect for the existing style and innovation (if, that is, the audience responds to innovation)? What vocabulary and usage does the audience expect and respect?

✦ **Openness to giving data:** How much personal data (such as the design constraints in the preceding "Demographics" section) does this audience want to give? What profile collection methods do members most respect and support? Are they likely to be concerned if you buy information about them from outside sources (direct-marketing companies, for example)?

Comparisons

Come to know your competition. By emulating the characteristics of the publications that each audience respects and avoiding the characteristics that they don't like, you can significantly boost the acceptance of your own publications. The following constraints tell you what publications and organizations each audience is likely to compare you to:

- **Benchmark publications:** What, for this audience, are the most well-known and respected publications that cover the same information that you do? Include competitors' Web sites and other publications as well as commercial publications such as magazines and books. What publications aren't well regarded by this audience and why?
- **Current publications:** What publications from your organizations and others do people from this audience most commonly read? Where do your current publications for this audience rate relative to the field of benchmark publications?

Value proposition

If you provide value in your publications equal to their effort or expense for your audiences, you create a stable system that continues to draw the audience and provides your organization with the value that it deserves back from its efforts. The following constraints help you work through a value proposition for each audience:

- **Benefit:** What do you want from this audience? Include in your answer any actions (buy, try, use, encourage others, and so on) and any attitudes (believe, trust, understand, know, and so on) that you want your publications to this audience to affect.
- **Cost:** What does this audience want from you? What must you give its members for them to leave your publication with the highest level of satisfaction?
- **Balance:** What is the balance point between what you want from the audience and what its members want from you? PLAN, for example, may want its in-country staff to promote the organization in the towns and villages they serve in. Staff may want more free time and less hassle translating materials into the local language. The balance may be for PLAN to create a small-sized print publication that consists only of pictures of children around the world who are involved in PLAN activities. By producing such publications, PLAN serves its own needs and also those of its staff.
- **Communication:** How do you communicate this value equation to this audience? Crafting a balanced value proposition in the mind of your team is one thing. Really crafting it with the audience is quite another. You're probably not going to choose to put the literal words of the value equation on the home page for this audience. But what do you do? How do you clearly show the agreement the publication is willing to make? Sometimes a simple headline is enough to get the message across. PLAN, for example, may detect that a staff member logs into its site and so prominently displays the tag line "Promote PLAN in 30 seconds!"
- **Feedback:** How do you monitor the acceptability of the value equation over time to your audiences? You may or may not have the wherewithal to hold focus groups and send out surveys, but what do you do to make sure that your equation stays in balance while you're continuing to deliver more to both sides?

Use

Correctly assessing the uses that your audiences make of your publications is critical to your success. If they're likely to come to your publications with certain tasks in mind, discover them and tailor your publications to help each user accomplish her goal. The following design constraints help you catalog the tasks and goals that a particular audience may have:

- **Goals:** What are the top three things that this audience wants from each publication that you target to it?
- **Use cases:** For each goal, develop one or more scenarios of an audience member coming to the publication with that goal in mind. Chart out the actions that the user may

take and the assumptions that she may make in navigating to the information and functionality that helps her meet that goal. What clues can you provide for this audience to indicate that certain content can be found in a particular place? What "wrong" assumptions may users make that you want to account for ahead of time?

✦ **Usability:** Given the technical savvy of this audience, how can you design your publications so that the users can reach their goals without being frustrated because they don't know how to use something? Can you get a group of members from this audience to test your ideas and assumptions? At this point in the analysis, you should catalog all the usability concerns that your audience analysis leads you to. Later, when you actually start building publications, you can run tests on the real publications.

✦ **Usage profiles:** How do you want this audience to use your publications? One time, periodically, or consistently? How much time do you expect members to spend per visit?

✦ **Disposition:** What dispositions are group members are likely to bring to a publication? Do they need quick answers, for example, or are they casually browsing; are they ready to take action, or do they need information first; do they know what they're looking for, or do they want you to tell them what they're looking for and then get it for them?

Profiles

For each audience type, you need to decide the traits and trait values that distinguish that audience from the rest of the world. After you complete this exercise for each audience, you combine your individual analyses into one overall profile analysis that charts all the traits that you intend to measure and how you expect to use these traits to decide who's in what audience. The following constraints help you work through a thorough cataloging of the traits that you want to distinguish for each audience:

✦ **Trait names:** What list of traits uniquely separates this audience from the rest of the world? Traits may be personal (age, sex, language, and so on) or professional (job title, company type, profession, and so on).

✦ **Trait values:** For each trait, determine what type of metadata field it is (free text, pattern text, Boolean, and so on). For more information on metadata fields, see Chapter 24, "Working with Metadata," in the section "Categorizing Metadata Fields." This information helps you build a user-profile database or XML schema later. PLAN, for example, may designate that donors are most likely married, with grown children, aged 50 or older, and making more than $100,000 per year.

✦ **Collection:** For each trait, determine how you value it for each person who uses your publications. You're likely to find that some traits are nearly impossible to assess without asking. See Chapter 32, "Designing Personalization," in the section "Personalization and the audience," for more information about collecting data about audience members.

✦ **Minimum requirements:** If you can't collect all the trait data on a person, what's the minimum amount that you consider sufficient to qualify a person as part of an audience? This constraint is where the profile "rubber hits the road." If you choose too little trait information, you miscategorize a lot of people and upset them. If you choose too much trait information, you can't always collect it all for each audience member, and you may end up with too few people who actually benefit from the targeted content that the audience receives.

✦ **Default audiences:** What do you do with people you can't place in an audience? Do you create a "general" audience type that gets all content? Put unknowns in one of the other audience groups? If all else fails, you can try asking users to categorize themselves. If you do so, instead of asking them to fill in a bunch of metadata fields, show them the personal and professional descriptive paragraphs that you wrote and ask them which one they think best describes them. Make sure that you provide a "none of the above" choice and a space where users can write in their own descriptions (thus providing you with invaluable feedback about the categories that you create).

Localization

Brainstorm the full list of localities that may visit your publications. Group your list into constituent, key, and one primary locality. (See the section "Audiences and Localization," earlier in this chapter, for the definitions of these terms.) Then fill in the following constraints to document your overall approach to localities:

- **ID:** Create a unique identifier for each locality that you can identify.
- **Name:** Create a name that you can use to refer to this locality later.
- **Language:** What language or languages does this locality speak?
- **Region:** In what geographical locations do people in this locality live?
- **Affiliation:** What significant affiliations (for example, social, political, religious) do people in this locality have that affect the way that you communicate with them?
- **Service:** Is this locality your primary locality, a key locality, or a constituent locality? If it's a constituent locality, what key locality serves it? Does the key locality fully encompass this locality, or are people from this locality less than optimally served? If you expect the Russian key locality to serve all Eastern European localities, for example, what respect or understanding do you lose from nonnative Russian speakers?
- **Audience:** To what audiences do people from this locality belong? Does studying the locality add anything to your audience analysis?
- **Key member:** Can you get a representative from this locality to serve as an advisor to your project?
- **Traits:** How do you know that a user is in this locality? List the traits and decide how you can collect them and how you can ensure that they're accurate.

Tasks

Consider the effect of your audience analysis on the ongoing maintenance of the CMS. Then fill in the following table to define any tasks that you imagine must happen on a recurring basis to run the CMS. Here are some task types to get you thinking:

- Periodic audience surveys.
- Review of the current set of audiences.
- Audience focus groups.
- Retrieval of user data that you buy periodically.
- Retiring inactive profiles from the user database.
- Review of the traits that make up each audience.
- Review of site logs to discover audience activity.
- Ongoing use case and usability testing.
- Periodic review of competing publications.

Finally, fill in the following table. I've provided a sample entry.

Task Name	*Who*	*What*	*When*	*How Much*	*How*
1. Audience focus groups	Marketing Analyst	Use Web feedback to find participants.	Once at start-up and once per year thereafter	Can be simple one-hour phone-based focus meetings	Collect Web feedback.
2. Recruit participants.					
3. Plan and conduct meetings.					
4. Debrief CMS team on results.					

The required information includes the following:

- **Task name:** Give the task a short but memorable name that describes it.
- **Who:** Indicate what person or role is responsible for accomplishing this task. (Naming an automated process here instead of a person is acceptable.)
- **What:** Describe how the person or process accomplishes the task.
- **When:** Specify at what frequency this task needs to be accomplished or how you know when it must occur.
- **How much:** Describe how much or how many of this sort of task you expect to do. A numerical quantity is preferable here, but if you can't come up with one, words such as *a lot*, *not much*, and so on suffice.
- **How:** Detail the skills, tools, or processes the person or process must have to accomplish this task.

Don't worry if the tasks that you come up with at this point are somewhat ill-defined or sketchy. In your workflow analysis (in Chapter 33, "Designing Workflow and Staffing Models"), you have ample opportunity to refine them.

Integrate

After you make your way through your audience analysis or make at least one or two passes through it, consider the following questions to help you tie the results of your analysis together and to the rest of the logical design:

- **The right set:** Look back over each audience. Do all the answers hang together? Did you need to answer questions with a lot of qualifiers and exceptions? Did you find a lot of diverse job descriptions, for example, in the same audience category? Could you identify a person who was typical of this audience? If you have the feeling that a particular audience has no center, that's a good indication that you may need to break it into smaller parts.
- **The right number:** Ask yourself again: Can you really serve the number of audiences that you've analyzed? If not, can you combine some together for the present until you

get more time or funding to expand? On the other hand, can you serve more audiences than you now have? How would you further subdivide the audiences if you had the chance?

- **Goals:** How do your audiences support your CMS project goals and vice versa? Are these the right audiences for your goals? If you could deliver the right content to these audiences would you really be closer to meeting your organization's goals? Are any other goals suggested by your analysis? Are these the right goals for your audiences? Are any others suggested?
- **Agreement:** Is your organization in agreement about these audiences? What must you do to see this set accepted as *the* set of audiences that your organization serves? Are the stakeholders in your organization all likely to agree with the way that you've divided and ranked audiences? Can you hand off the ongoing audience analysis to a marketing or public relations group? How will you ensure that other analyses further refine rather than contradict this analysis?
- **Understanding:** Do your sponsors and project team understand these audiences? Do they understand and support the value proposition, and are they likely to agree to abide by it?

Summary

The notion of an audience for the purposes of a CMS isn't so different from other prevailing views. What a CMS needs, however, is more than just a good notion of an audience — it needs a lot of factual data about your audiences that it can use to select content. To analyze audiences for a CMS, you must perform the following tasks:

- Name and identify each one.
- Collect as much demographic and statistical data as you can on each one.
- Understand and account for the attitudes of the audiences in the construction of your content and publications.
- Decide what publications audiences are most likely to compare yours to and make sure that your publications compare favorably.
- Understand the uses that each audience is likely to make of your publications and make sure that you serve those uses.
- Create profiles for each audience that indicate definitively which users are in which audience.

In the next chapter, I discuss the complex task of fully analyzing and designing your publications.

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