



Welcome Back!

November 15th 2023


Oslo

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House Keeping...

- 1. Office layout and facilities**
- 2. Coffee machine, water cooler, Light refreshments**
- 3. Meeting rooms for Stream 1 and Stream 2**

Running Order...

Tuesday (Day 1) – Today		Wednesday (Day 2) - Tomorrow	
13:00	Intro and welcome from SD CEO and CSD 	09:00	Summary of Day 1
13:30	Walkthrough of the End-to-End SD Processes	09:30	Introducing Customer Success (2024 Engagement model) SN and SO CEO meet and greet
14:30	Coffee break and “meet the team”	10:15	Coffee break – mingle with SN and SO CEO’s
15:00	Stream 1 – Standards Development Workshop Authoring, Viewer, Enquiry Product Roadmaps - 2024 plans and priorities	10:45	Stream 1 – Standards Development Workshop Shared use cases, best practices and common issues importing standards
15:00	Stream 2 – Marketing & Sales Workshop Store, Import, Subscription Price Product Roadmaps - 2024 plans and priorities	10:45	Stream 2 – Marketing Sales Workshop SD Store & Subscription Price - Reviewing what we have today, and where we should be going in the future...
17:00	Close Day 1 Leave for hotel, meet for dinner at restaurant...	12:15	Summary session for all participants Discussing topics, priorities, actions, next steps...
19:30	Dinner	13:00	Day 2 and Event Closure - Thank you!



Day 1 Summary

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Day 1 Summary

Stream 1: Standards Development

1. *Reviewed feature list for SD Authoring and SD Enquiry*
 2. *Voted on value / usefulness of each feature*
- We will present a short intro to SD Enquiry for all...*

Day 1 Summary


Stream 2: Marketing & Sales

1. *Reviewed the SD Import and SD Store roadmap, which included priorities already set by SD*
 2. *Today we will workshop customer specific ideas and priorities them for inclusion in the roadmap*
- *We will present a short intro to SD Store for all...*



Any highlights from
yesterday?

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Introducing Customer Success

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What is Customer Success?

$$CE \times CO = CS$$

Customer **S**uccess is when
Customer **E**xperience meets Customer **O**utcomes

A Human First approach

What does it mean?

- 1. Listening to your needs**
- 2. Providing you with a positive experience**
- 3. Helping you achieve your desired outcomes**

In short...

- **Your success is our success**
- **We can only be successful if you're successful**

CS Measures

Monitoring:

- 1. Customer Health**
- 2. Customer Satisfaction surveys**
- 3. Customer feedback**
- 4. First contact resolutions rates**
- 5. Net Promoter Score**

What is NPS?

NPS is a benchmarking tool for customer satisfaction..

“On a scale of 0-10, how likely is it that you would recommend us to friends, colleagues or business associates?”

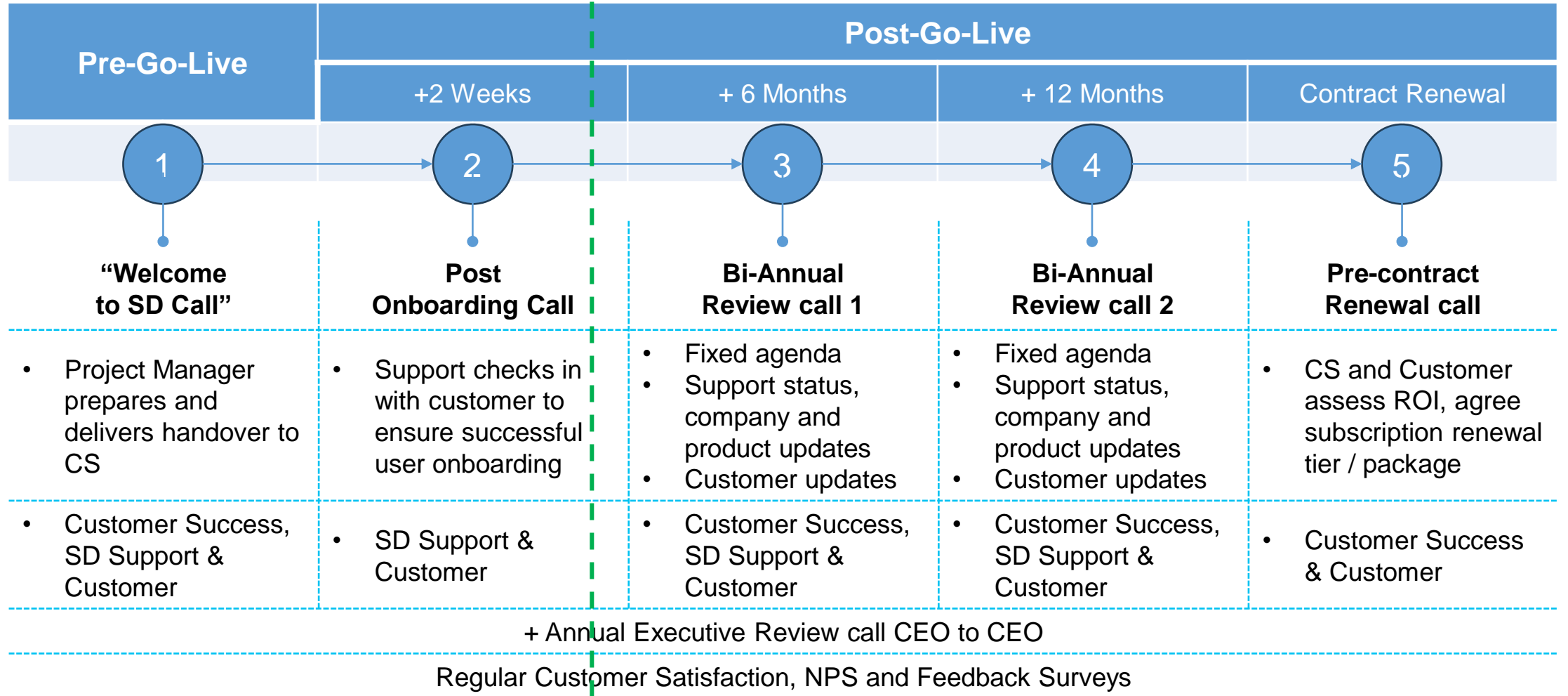
(0 is bad, 10 is great!)



CS Engagement model 2024

Customer Engagement:

Already Live ?



Steps in the right direction..

- 1. Formation of the Product Managers & Tech Leads**
- 2. ISO 27001 and working towards 20000**
- 3. SD Days**
- 4. Initiating the Engagement model**
- 5. ... More to come!**



How will you define success in 2024?

What do you expect from us?



Thank you for listening!

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Stream 1 – Standards Development Workshop

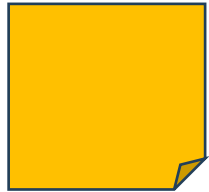
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Possible topics to discuss

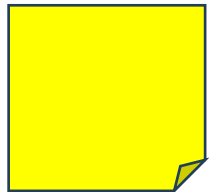
- Shared use cases and best practices/ tips and tricks to handle them
 - Creating national adoptions of CEN/CENELEC standards
 - translating european/international standards
 - authoring purely national standards
- Importing ISO/IEC/CEN/CENELEC standards into AT
- Best Practices:
 - Working with commenting
 - Working with versions and milestones



Possible topics to discuss



Creating national adoptions of CEN/CENELEC standards



Translating european/international standards



Authoring purely national standards



Working with commenting



Working with versions and milestones



Importing ISO/IEC/CEN/CENELEC documents into AT

- At has functionality that allows you to upload valid NISO STS files into AT.
- *Note: AT is based on the same software ISO/IEC/CEN/CENELEC are using for their OSD project*
- But what IS valid NISO STS??
- in Theory, XML provided by ISO/IEC/CEN/CENELEC should follow the Guidelines for coding NISO STS Standards
 - The ISO OSD should produce XML as defined in the guidelines
- in Practice:
 - there are still differences between ISO and IEC in terms of encoding
 - the current ISO OSD is not in line with the guidelines (work in progress)
 - the coding guidelines have evolved over the years, but no organization have updated the XML in their back-catalogue
 - The QC done on the XML especially at CEN/CENELEC and IEC is quite poor and we often encounter XML that is invalid/ missing images/...
- but: AT requires one very specific way of XML encoding in order to work correctly
- RESULT: not all files received from ISO/IEC/CEN/CENELEC will import into AT!



Importing ISO/IEC/CEN/CENELEC documents into AT

.... so what can we do about it?

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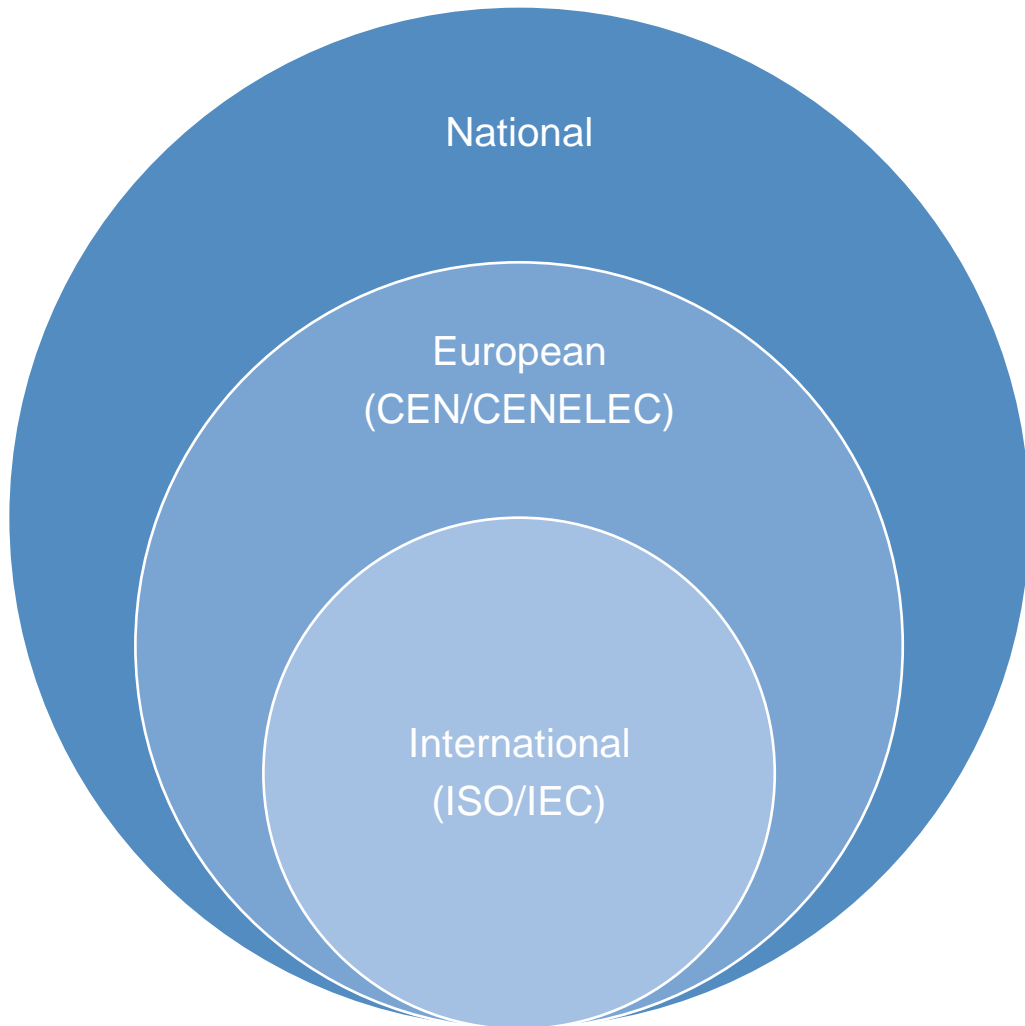
- Implement transformations for the most common use cases preventing upload, such as:
 - graphic files stored in different locations
 - <reg-meta> instead of <std-meta>
 - footnotes at the end of the standard,
 - ...
- Influence ISO's development team to be more accurate in their XML encoding

You as Members

Make yourself heard!

- provide feedback to ISO/IEC/CEN/CENELEC when you find errors and request correction
- make them understand that the coding guidelines and their correct application are important and you want to be involved!
- share import issues with SD so we can add potential transformations

Authoring National Adoptions: principles



Adoptions are like an Onion: the national content is added around the European and/or International content

Basic assumptions:

- the European and International content is not modified
- National content can be added to the front of the document:
 - national foreword
 - national coverpages
- National content can be added to the back of the document:
 - national Annexes
 - national Bibliography
- National content can be added to the European and International content through
 - National notes
 - National footnotes



How do you create national adoptions?



✓ ...



Possible ways to create adoptions using AT

- **Option 1: All in one**

- The international and European content is added into a single document in AT
- National content is added, i.e.
 - National foreword
 - National notes/footnotes
 - National Annexes
- Single XML file is produced from AT which can then be used for publishing

- **Option 2: Piece by Piece**

- If we assume we don't want to touch the European/international content at all, we don't need it in AT
 - in case of national notes, these can be added into the national foreword
- In AT, we create a national annex (specific template only containing the <back> matter of the standard)
- in AT (or elsewhere), create the national foreword
- Use your XML production chain to assemble the XML into a single file using the original ISO/CEN xml files and the nationally created files that can then be used for publishing



Translating documents

- AT is not a translation software
- Each working document has a single language assigned to it
- Therefore you either:
 - upload a translated XML (from a translation software like Trados)
 - upload the XML in the original language and overwrite it with the translation bit by bit
 - create a new document from scratch and write your translation in there



How do you work when you need to translate documents into your national language?



✓ ...



Authoring national standards

- Most organizations have internal guidelines on how to write national standards, including a predefined structure, boilerplate (common) text for specific sections like the foreword and formatting guideline for common elements like figures, tables, equations, notes, examples etc



1. Structure and boilerplate text should be setup in the template

- ✓ if you need different boilerplate for different deliverables but the structure is the same, just add all boilerplate texts into the template and ask users to delete the ones that don't apply

2. No need to include formatting examples

- ✓ Since the AT has predefined ways to add things such as examples, notes, figures etc, there is no need to include examples in your templates; users will not have a choice to add something different

3. The less templates you have, the better

- ✓ adding templates that are fundamentally the same but differ only in small things is time- and maintenance-consuming and not really necessary
- ✓ The only real differentiation you need is for different languages



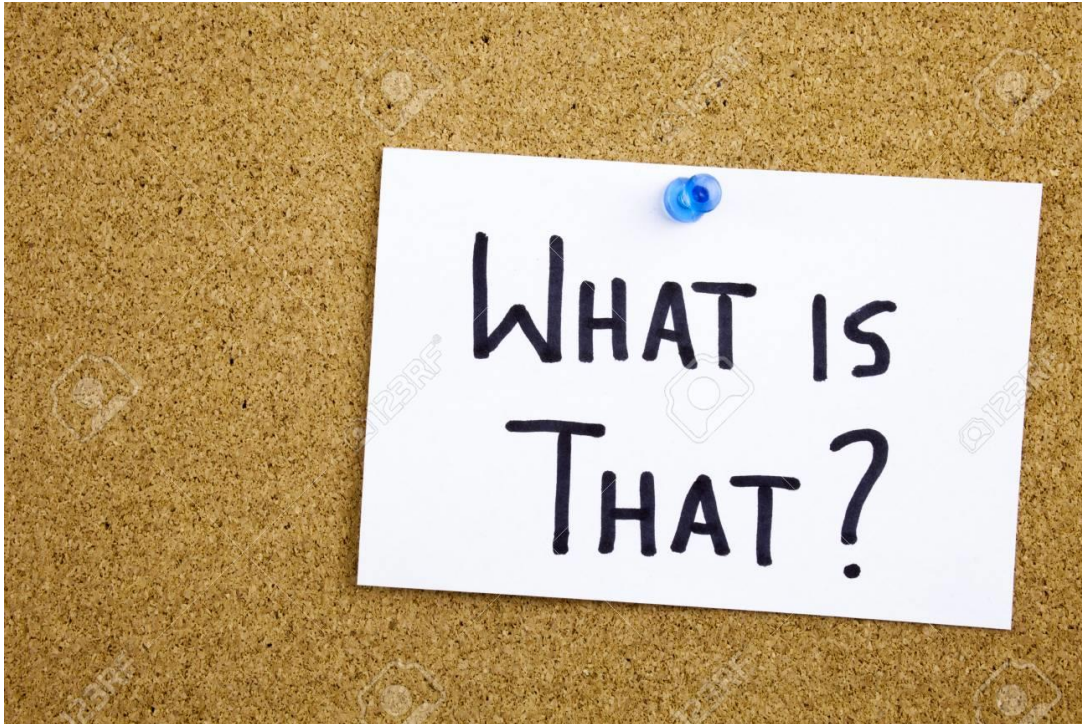
SD can setup custom templates with

- Custom auto-numbering schemes
- Custom structure
- Custom rules on mandatory/optional clauses

We also have experience setting up templates for documents that are not traditional standards, for examples laws, guides etc.



Working with Versions and Milestones



Version

- functionally: a “snapshot” of your document at a given time → enables you to keep a clean version of your document at a given moment
- technically: a new copy of the document

Milestone

- functionally: An event, process step,... affecting your document lifecycle
- technically: a metadata element associated to your document



What do you use Versions and Milestones for?



Versions

✓ ...

Milestones

✓ ...

Recommended usage



- Versions and Milestones naturally work well together.
- As an organization, you probably have the major milestones in the project development lifecycle already defined, and these will be your **milestones**, for example:
 - Authoring
 - Translation
 - Editing for Enquiry
 - Public Enquiry
 - Authoring after Enquiry
 - Editing after Enquiry
 - Publication
- It is likely that at some stage in time, you will want to see the document as it was in each of the major phases of the document, these will be your **versions**
- It is interesting to associate fixed version numbers to each milestones, so for example:
 - Authoring – V1.0
 - Translation – V2.0
 - Editing for Enquiry – V3.0 etc



Recommended usage



Milestone

- As an organization, set predefined Milestones that all project should use



Version

- Anytime you reach a major Milestone in your project, create a new “major” version (i.e.1.0, 2.0, 3.0 etc).
- Anytime the team is doing some major changes, create a “minor” version of your document (i.e. 1.1, 1.2, 1.3 etc) before starting the changes/authoring

- ✓ Easy for everyone to see in which stage of the process the document currently is
- ✓ Easy to go back to a previous version if errors have occurred
- ✓ in the new document history, easy comparison between versions



Working with Commenting



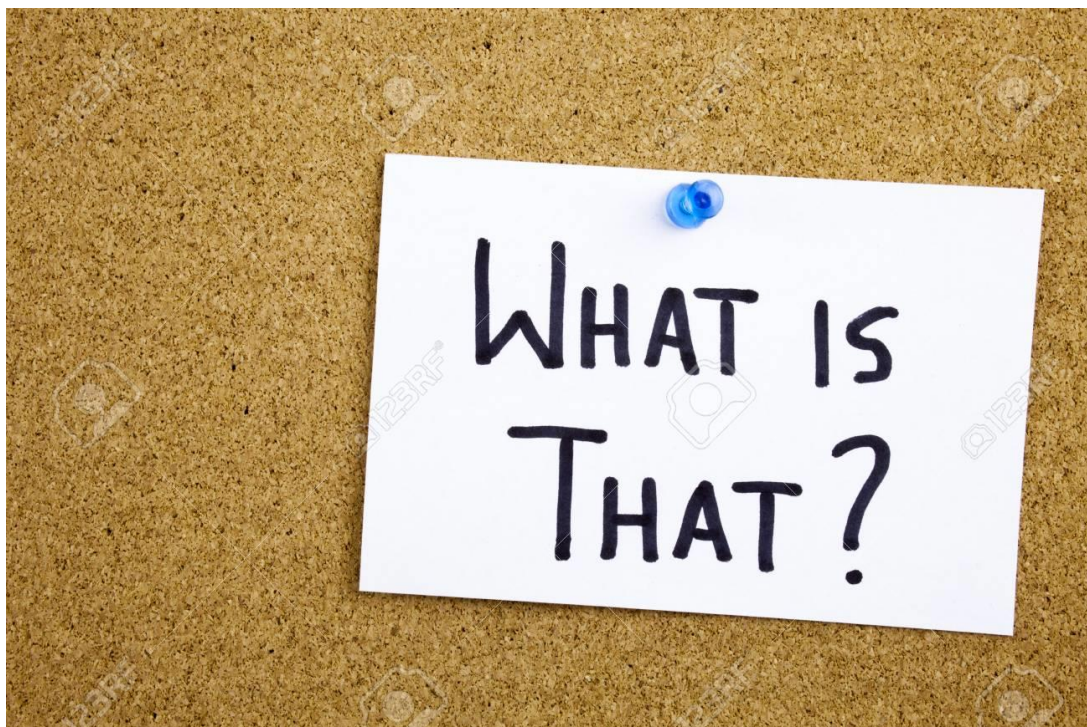
Commenting is a feature of the system that enables comments and proposals.

Comments:

- Make a comment in the text without adding a concrete proposed change

Proposals:

- proposes an actual change to the existing text/ equation/ figure/ table
- Shown in a “track-changes” way
- proposed changes can be automatically applied



NOTE: in Fonto 8, comments/proposals are immediately shared when user enters them; in the current production system comments are first private and need to be actively shared



What do you like best about the AT commenting features?
How do you use them?

✓ ...





What is missing from the AT commenting that would make your life easier?



✓ ...



Some tips and tricks

Use tags to categorize your comments

Tags are like keywords that can be associated to comments; they can be used to categorize comments and filter on this categorization, for example, tag a subset of comments:

1. for review in an upcoming meeting
2. for review by a specific person or to assign responsibility of an area to a specific person
3. for noting things that should be handled in the next edition of the document
4. etc

Download comments

For sharing comments with people that do not have access to the AT tool, you can export the comments in 2 formats:

1. Excel format: contains all relevant information on the comment in multiple columns
2. MS Word format: specifically designed to match the ISO commenting template

We recommend to use the exporting of comments as little as possible; comments cannot be imported back, so it's best to use the comment filtering features in AT to find what you are looking for



Some tips and tricks



Reach consensus

Comments and proposals can be controversial; it may be difficult to reach a consensus within the WG on which comments should be accepted/ rejected.

Did you know that on each comment you can “vote” to support/ don’t support the comment? This can be done “live” in a WG meeting or people could do this in preparation of a meeting.



Stream 2 – Marketing & Sales Workshop

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Store Workshop



Store Workshop: Ideas for Store 2024+ Roadmap | Date: 15/11/23 | Location: Oslo, Norway

GOAL The goal is to brainstorm ideas for SD Store, vote for them and prioritize. Most voted and valuable ideas will go to Store Backlog for 2024 and the future.	MAD	GOOD	QUESTIONABLE	Rules <ul style="list-style-type: none">- No limit on the number of ideas per person- Discuss ideas in a group of 3 people- Present ideas for the rest of group- Each participant has 5 votes that can be distributed between ideas (you can put any amount of votes to any idea)- List of the most voted ideas will be created as a result and taken into the account for the Store Roadmap and Backlog in 2024 and further
GOOD - All the ideas that are clear, viable for business and could be developed				Sticky notes
MAD - Ideas that sounds a little crazy to be implemented in the closest future, but have a potential to be taken in the account after a few years or could be reviewed				
QUESTIONABLE - Ideas that can negatively affect business or functionality that already exists in Store.				
Sticky notes				