Introducing Language Technology to the Editing Process: How to do Things Right the First Time

Gerald von Stein-Salisbury, Daniel Zielinski

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STUTTGART, NOVEMBER 8–10

loctimize

Agenda

- Introduction
- Defining a strategy and setting the goals
- Managing expectations
- Planning a budget
- Involving the right people
- Defining the requirements
- Doing proper evaluation
- Planning implementation and rollout
- Managing change
- Continuous improvement

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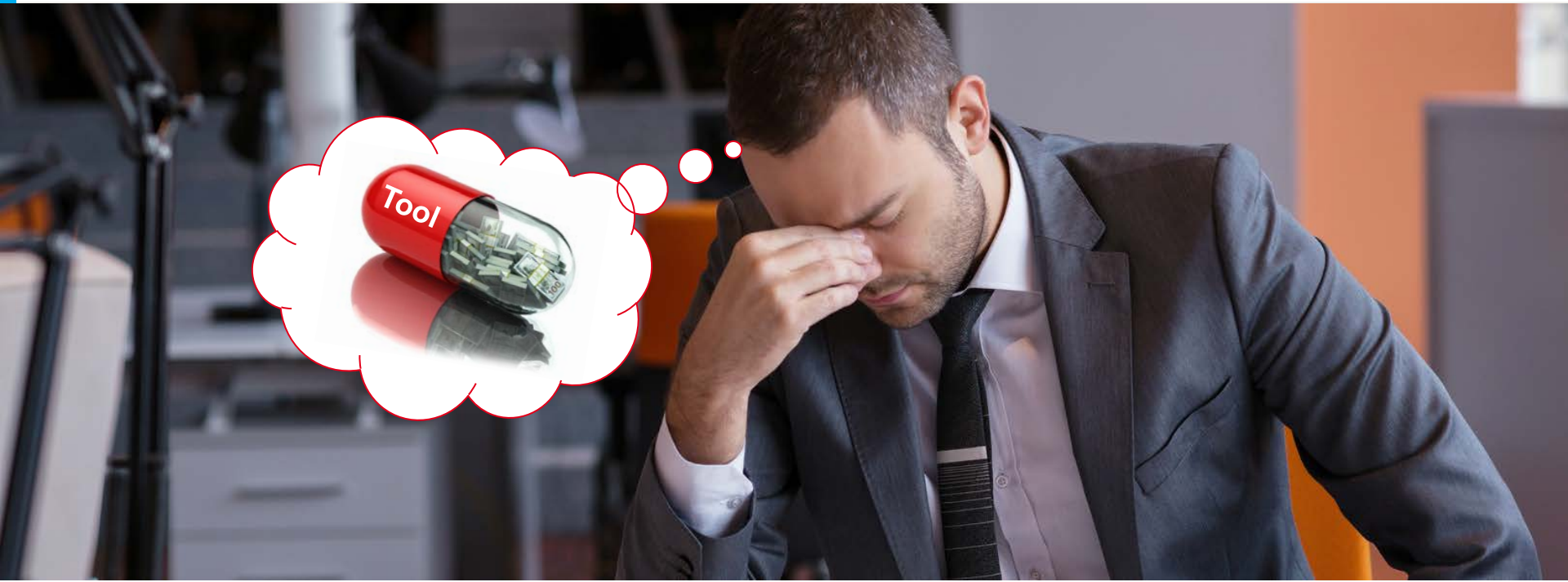
Introduction

“What makes organizations decide to implement a language technology solution for technical editing and technical translations?“



Pain!

Language technology in technical editing and translation

Authoring tools
Schema ST4, TIM RS…

Controlled language tools
Acrolinx, Congree…

Translation management systems
Across, Déjà Vu, MemoQ, Memsource, Plunet Business Manager, SDL Trados Studio, Wordbee, Wordfast, XTM, XTRF…

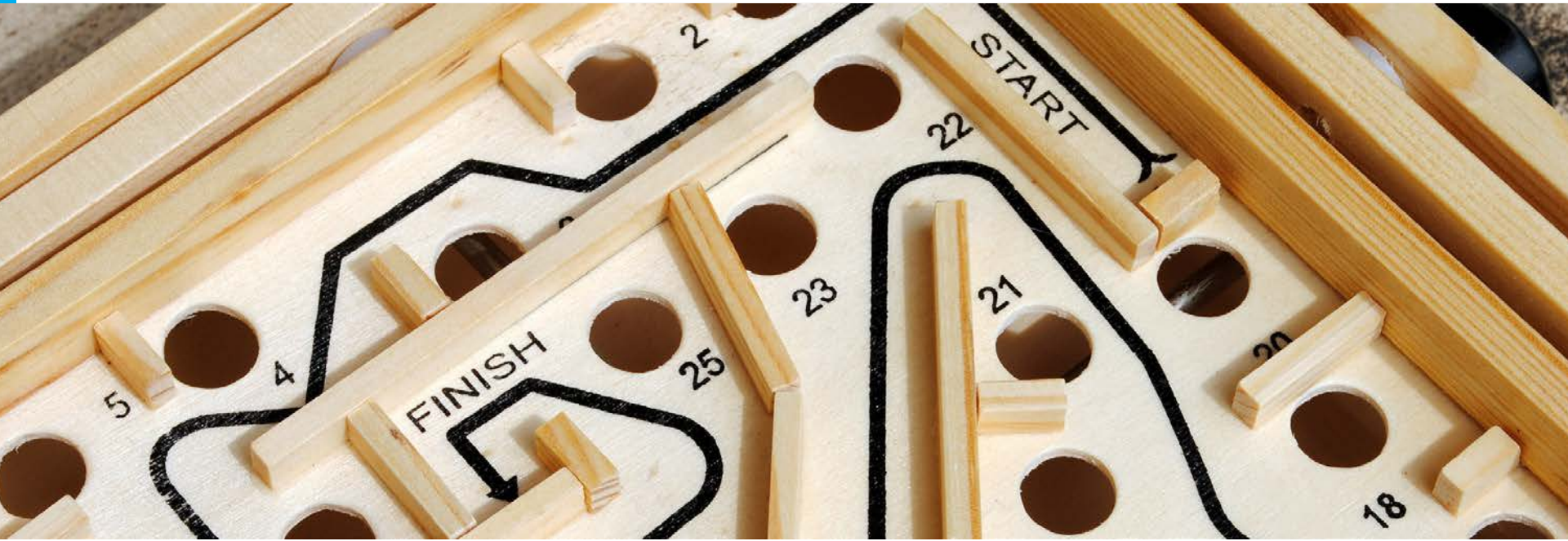
Terminology management systems
Coreon, EvoTerm, SDL MultiTerm, TermWeb…

Machine translation systems
Asia Online, Kantan MT, Lucy LT, SDL Language Cloud…

Quality assurance tools
ErrorSpy, QA Distiller, Verifika, ApSIC Xbench…

“Implementing a single solution is often seen as a straightforward project. However, it quickly becomes very interesting as well as complicated when integrating the solution into the workflow with other tools.“


chiefmartec.com Marketing Technology Landscape
March 2016
Advertising & Promotion
Mobile Marketing
Display & Programmatic Advertising
Search & Social Advertising
Native/Content Advertising
Video Advertising
Print
PR
Content & Experience
Mobile Apps
Video Marketing
Interactive Content
Email Marketing
Content Marketing
Optimization, Personalization & Testing
DAM & MRM
SEO
Marketing Automation & Campaign/Lead Management
CMS & Web Experience Management
Social & Relationships
Call Analytics & Management
ABM
Events, Meetings & Webinars
Social Media Marketing & Monitoring
Advocacy, Loyalty & Referrals
Influencers
Community & Reviews
Feedback & Chat
Customer Experience, Service & Success
CRM
Commerce & Sales
Retail & Proximity Marketing
Channel, Partner & Local Marketing
Sales Automation, Enablement & Intelligence
Affiliate Marketing & Management
Ecommerce Marketing
Ecommerce Platforms & Carts
Data
Audience/Market Data & Data Enhancement
Marketing Analytics, Performance & Attribution
Mobile & Web Analytics
Dashboards & Data Visualization
Business/Customer Intelligence & Data Science
IPaaS, Cloud/Data Integration & Tag Management
DMP
Predictive Analytics
Customer Data Platforms
Management
Talent Management
Product Mgmt
Budgeting & Finance
Collaboration
Projects & Workflow
Agile & Lean Mgmt
Vendor Analysis
Sources: CabinetM (http://cabinetm.com), Capterra, G2 Crowd, Google, Growthverse, LUMA Partners, Siftery, TrustRadius, VBProfiles — see http://chiefmartec.com/2016/03/marketing-technology-supergraphic-2016/ for details.
Created by Scott Brinker (@chiefmartec)



Defining a strategy and setting the goals

- Strategy
  - What is the internationalization strategy of the organization?
  - What is the strategy for technical communication?
  - What is the role of technical documentation and technical translation in the organization? (core processes vs. support processes, criticality)
  - What are the publication channels?
  - What is the translation strategy? (Insourcing vs. outsourcing, centralized vs. decentralized management)
  - Who are the stakeholders?
  - What are their responsibilities?
  - What is the short-term, mid-term, long-term strategy?
  - …

- Analyze
  - Where is the biggest potential in terms of
    - Process optimization
    - Automation
    - Savings?
  - Which parts of the organization will be affected?
    - Technical documentation
    - Translation
    - Product management
    - Content management
    - Marketing
  - Which existing systems will be affected?

Implementing language technology is not always the (only) answer!
A project to assess the current practice and technology might be in order before jumping to conclusions and kick off a new implementation project.

- Goals
  - What are the goals when implementing language technology?
    - Make communication more effective.
    - Improve overall efficiency for all people in the organization.
    - Increase quality.
    - Save time.
    - Save money.
  - Define KPIs

Align goals with strategy for i18n, l10n, t9n.
Define SMART and realistic goals.
Set a clear target (X% cost or time savings)

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Managing expectations

- Managing expectations – Example: Authoring tools
  - Clients expect:
    - to use authoring tools without any defined processes.
    - authoring tools to adapt to the organization‘s crazy processes.
    - that authoring tools work out of the box.
    - to just dump all existing documentation into the new tool and do some magic.
    - the authoring tool to render the documentation in any complex layout.
    - to get high quality documentation for only a fraction of the standard price.
    - to use an authoring tool without any training.
    - …

- Managing expectations – Example: Translation Memory
  - Clients expect:
    - to use translation memory systems without any defined processes.
    - to get high quality translations for only a fraction of the standard price.
    - that high matches from the TM (100%, 101%, 102%, CM) don‘t need to be reviewed.
    - that 100 minor changes of a text have no effect on translation memory reuse.
    - that TM technology works equally well for all text types and domains.
    - that TMs don‘t need to be managed and maintained.
    - that TM content can be exchanged between any TM system without any data loss.
    - …

- Managing expectations – Example: Terminology management systems
  - Clients expect:
    - to use terminology management systems without any defined processes.
    - not to find any terminology issues in translations anymore when using a terminology management system.
    - that target language terminology can straighten out the source language quality.
    - terminology management to be nothing more than a two column Excel spreadsheet.
    - that termbases don‘t need to be managed and maintained.
    - that automated terminology recognition and terminology checking works (perfectly and equally well for all languages).
    - that termbase content can be exchanged between any terminology management system without any data loss.
    - …

- Managing expectations – Example: Machine translation systems
  - Clients expect:
    - to get high quality translations for only a fraction of the standard price.
    - that MT output doesn‘t need to be reviewed.
    - that MT works equally well for all text types, languages and domains.
    - that MT substitutes human translators.
    - …
  - Language service providers expect:
    - that out of the box MT solutions will produce good results.
    - unrealistic productivity gains using MT.
    - unrealistic savings from using MT.
    - …

- Managing expectations: How to do it?
  - Involve all stakeholders right from the start.
  - Communicate and discuss expectations.
  - Educate stakeholders.
  - Inform stakeholders.
  - Don‘t believe everything you hear or read!
  - Do a reality check (research).

“Google announces to radically improve the functionality of its translation service. Are we getting close to human translation quality?“
m.faz.net, 28 Sept. 2016

“Google‘s Neural Machine Translation System: Bridging the Gap between Human and Machine Translation“
Google Research Blog, 27 Sept. 2016

Planning the budget

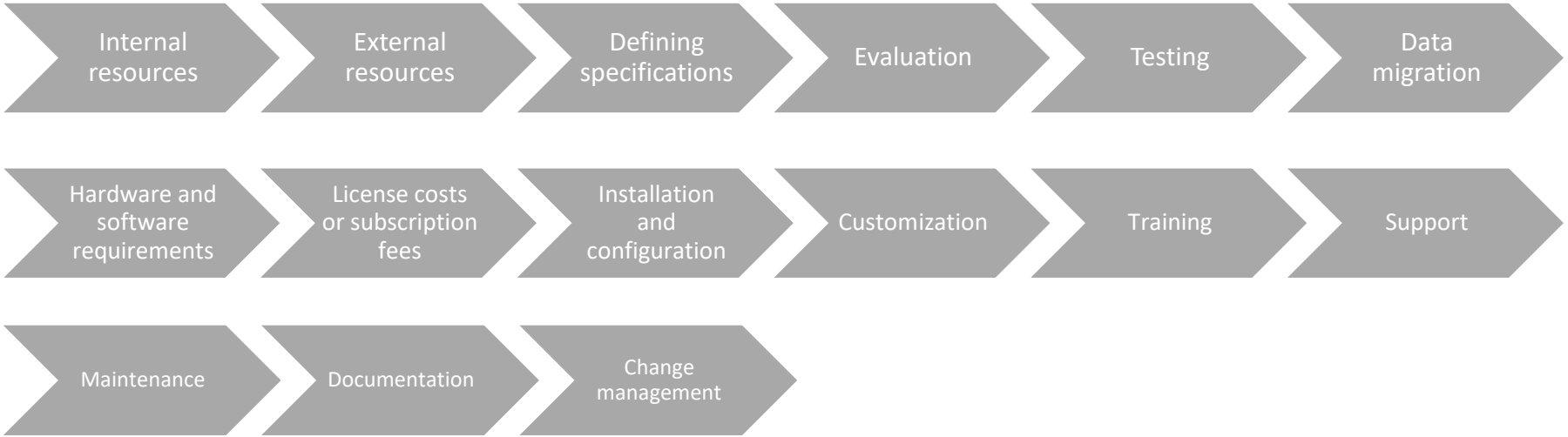
“The cost of implementing language technology is often underestimated due to the lack of knowledge and experience in the organization.“

Case study: Implementation of a server-based translation memory system

Cost for services amount to 65% of total implementation cost in the first year. It‘s two times the license cost.

- Planning the budget OR Planning a budget.
  - Common misconception or problem is that either no budget or a too small budget is planned for the implementation of language technology.
  - One of the reasons is that either the goals of the project are not clearly defined.
  - Another reason is that the time required to do a proper introduction of language technology is often underestimated by clients AND by software providers.
  - There is no such thing as a standard installation.

- Planning the budget OR Planning a budget for your tool AND:



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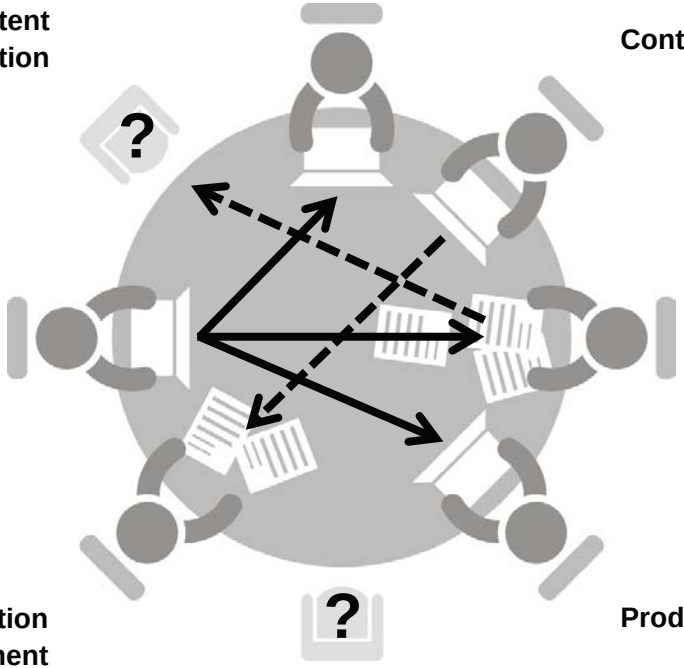
Involving the right people

- Involving the right people (Who is affected by the project? Whose interests are affected? Who will benefit from the project? Who will support the project?)
  - Upper management
  - Middle management
  - Departmental managers
  - Team members
- Involve people as early as possible
- Involve enough people and not too many
- Involve external experts if necessary
- Don‘t forget to involve external service providers ;-)



Defining the requirements

- Defining the requirements
  - Business requirements
    - Which business processes does the software need to support?
    - Which business goals should the software help to achieve?
  - Functional requirements
    - What functions does a software need to provide?
- Collect requirements from all relevant stakeholders
- Group requirements into categories (by processes, stakeholders, components, supported file formats for input and output, interfaces, system requirements, licensing etc.)
- Align business and functional requirements
- Define priorities (Must have, need to have, nice to have)

- Defining the requirements: Typical problems
  - Processes are not defined and/or documented
  - Very common: People involved in the project are no experts in the specific field
  - People involved are no experts in the selected technology (do not know what is possible, which features exist, which processes are supported, how exactly processes are supported, how data is managed etc.)
  - Requirements are often based only on the experience with one technology or product (reflected by product-specific terminology in the specification documents).

Sometimes leads to premature decisions on which solution to choose.

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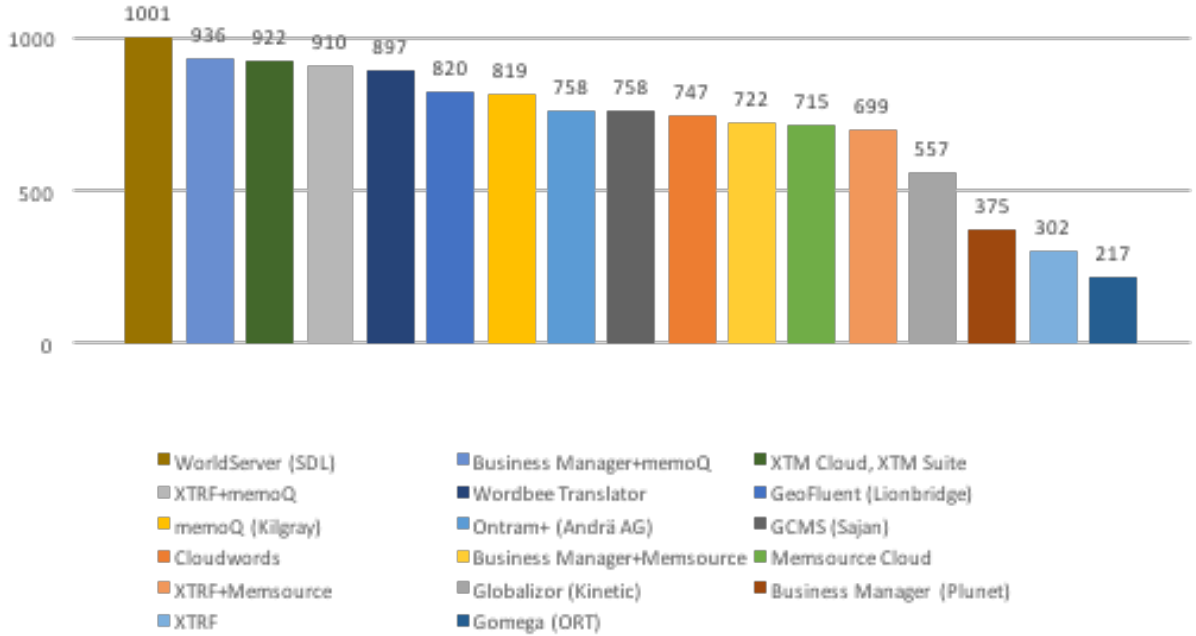
Doing a proper evaluation

- Doing a proper evaluation
  - Evaluating software solutions can be a complex and tricky task.
  - Comparing feature lists is often used as a starting point for pre-selecting solutions.
  - Comparing feature lists comes with a risk: A lot of software providers claim to provide a feature (e.g. supporting PDF files for translation). However, there can be big differences between how software products implemented that feature and what exactly are the options.
  - A proper evaluation needs to include proper software testing.
  - Software demonstrations are no substitute for testing.

Case study: Selection criteria for selecting a translation management system for a global corporate client

File formats	Priority	Answer	Comment
Does your system support the following file formats:			
InDesign CS3 up to CC via IDML	Must have	Yes	InDesign idml is supported from version 4 onwards incl cc. Lower versions are supported via inx
Does your system automatically convert INDD to IDML?	Nice to have	No	
Is there an option to include/exclude hidden layers for translation?	Must have	Yes	
Is there an option to import documents with tracked changes?	Nice to have	Yes	
Is there an option to include/exclude master pages for translation?	0	Yes	
Does your system provide a real-time preview for InDesign documents?	Must have	Yes	Supported via third-party solutions.In cooperation e.g. with O/R/T (frontlab) or via GlobalReview (Kaleidoscope) or 1iO (Kuhnert). SDL will be Main solution provider and legal partner.
Does your system provide an offline preview for InDesign documents (preview as PDF on demand)?	Must have	Yes	Supported via third-party solutions. In cooperation with O/R/T (frontlab) or via GlobalReview (Kaleidoscope) or 1iO (Kuhnert).
Does the preview function support images and custom fonts?	Must have	Yes	see previous question

Case study: Evaluation of a translation management system for a global corporate client



- Doing proper testing
  - How does the selected system fit into the work environment?
  - How are certain features implemented? How do they work?
  - How does the system support certain file formats?
  - How are interfaces with other systems defined? How do they work?
  - How easy is it to onboard and use the system?
  - How easy is it to customize the system?

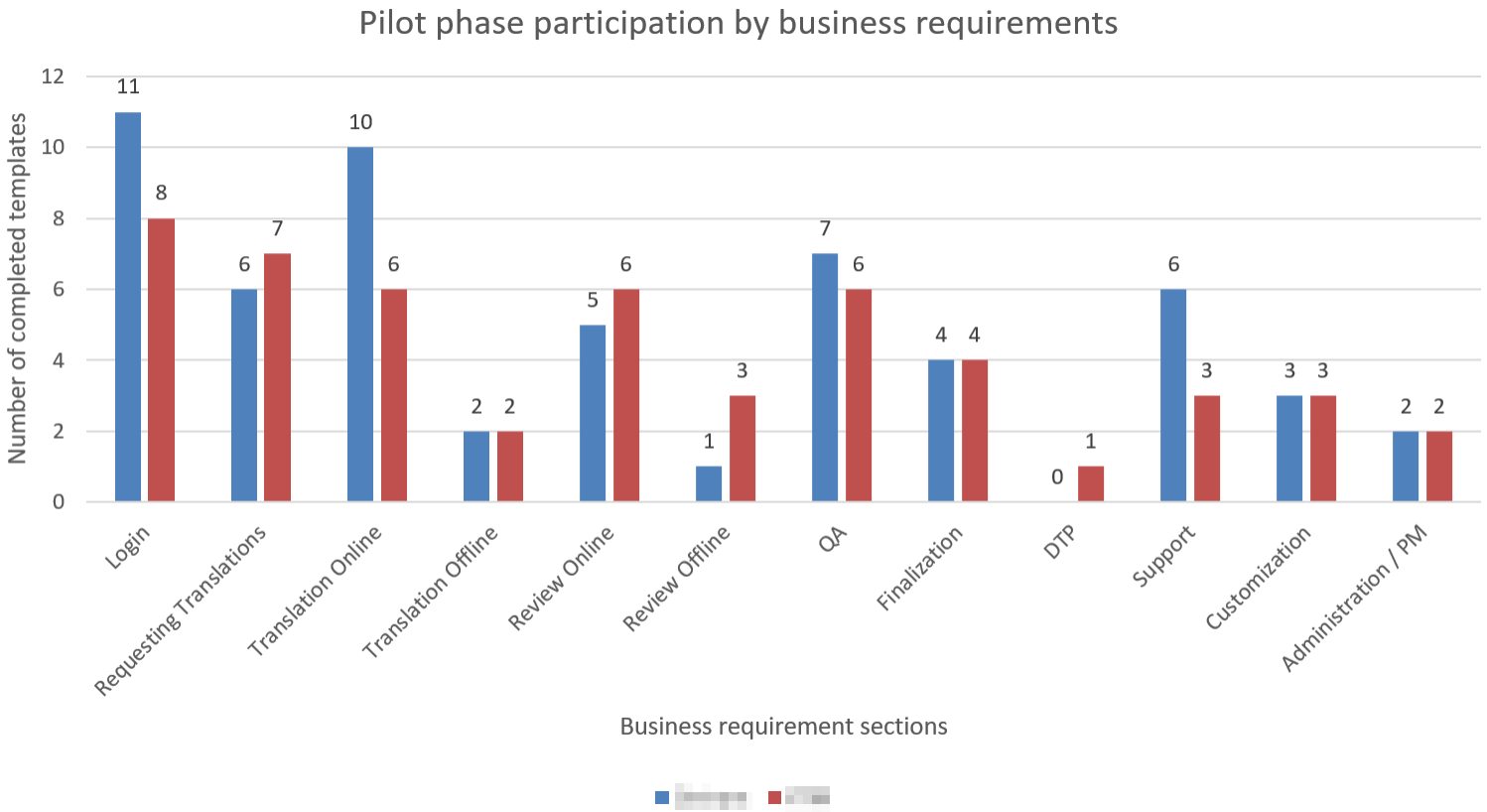
- Types of software tests
  - System testing
  - Performance testing
  - Functional testing
  - User acceptance testing
  - Usability testing

- Test planning
  - What kind of tests to run?
  - Define testing environment, procedure and expected results
  - Select software testers
  - Define documentation template for test results
  - Define how to evaluate test results
  - Define timeline
  - Define how to deal with test feedback

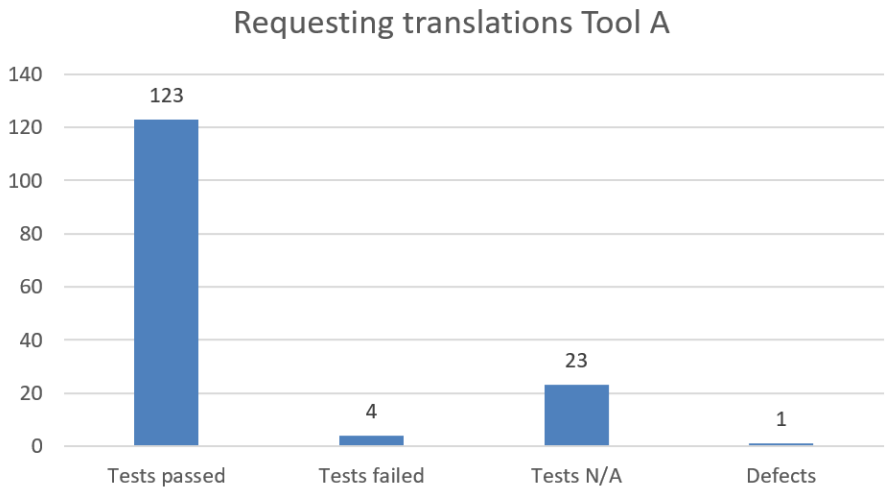
	A	B	H	I	J	K
1		**Project Name:**	Project 001	**Tests Designed by:**	Daniel Zielinski, Loctimize	
2		**Product Name:**	XTM	**Tests Designed date:**	21.10.2015	
3		**Tests Executed by:**	My Name	**Tests Version:**	2	
4		**Test Execution date:**	1-Nov-15	**BSD/FSD sections**	Project management	
5						
7	**Dependencies:**	None				
8	**Test Priorities**	High				
9						
10	**Test scenario ID**	**Test Objective/Test scenarios**	**Status**	**Notes**	**Defects**	**Reported**
11	**DTP**					
12	TS_DTP_001	Check if you you received an email message from the system notifying you that your translation is ready.				
13	TS_DTP_002	Check the notification email from the system if all required information is included (project name, task, description, deadline etc.)				
14	TS_DTP_003	Check if the contents of the notification email from the system is clear and easily understandable.				
15	TS_DTP_004	Click on the hyperlink in the email notification to open the login page or access the job if already logged in				
16	TS_DTP_005	Login to the system with your login credentials				
17	TS_DTP_006	Select the translation project/job for which you would like to download your documents				
18	TS_DTP_007	Download the translated InDesign documents to be worked on.				
19	TS_DTP_008	Download any attached reference material such as fonts, preview PDFs etc.				
20	TS_DTP_009	Deliver your work by uploading your layouted translated files to the system (if applicable)				
21	TS_DTP_010	Check that you can upload any additional reference material like PDFs etc. (if applicable)				
22	TS_DTP_011	Finish your task				
23						
24					**Total number of tests:**	11
25					**Tests passed:**	0
26					**Tests failed:**	0
27					**Test N/A:**	11

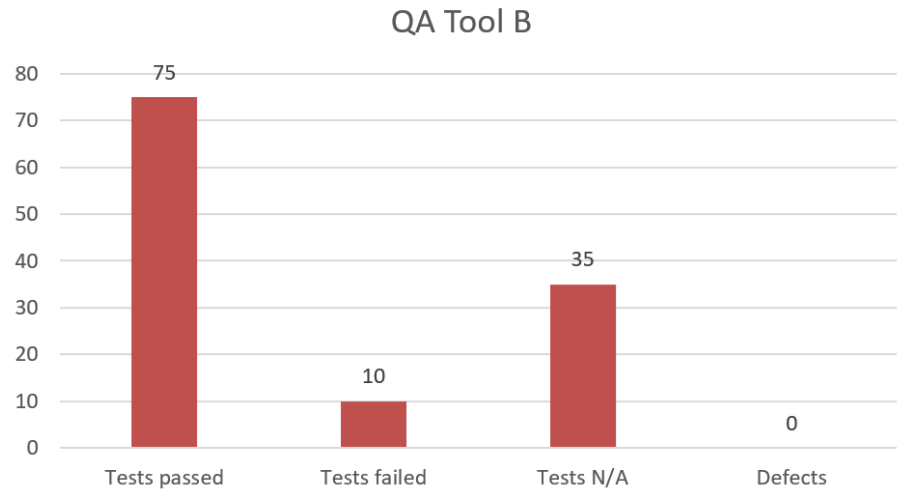
Welcome | Metadata | DTP

Sample test report template


Pilot phase participation by business requirements
Number of completed templates
0
2
4
6
8
10
12
11
8
6
7
10
6
2
2
5
6
1
3
7
6
4
4
0
1
6
3
3
3
2
2
Login
Requesting Translations
Translation Online
Translation Offline
Review Online
Review Offline
QA
Finalization
DTP
Support
Customization
Administration / PM
Business requirement sections

Test results by business requirements





Planning implementation and rollout

- Planning implementation and rollout
  - Proper planning is the key to success
  - Define rollout strategy: simultaneous rollout throughout the whole organization, rollout department by department or site by site
  - Prepare IT environment
  - Install and configure software systems
  - Customize software systems
  - Migrate existing data
  - Test systems
  - Involve key users and product champions
  - User qualification
  - Run pilot projects

- Planning implementation and rollout: User qualification
  - Customized training targeted for specific user groups
  - Task-oriented instead of feature-oriented training
  - Decide on the type of training (onsite vs. online, face-to-face, e-learning, blended learning)
  - Plan enough time for users to learn new processes, new user interfaces etc.
  - Assess training outcome
  - Provide support throughout initial implementation phase

- Planning implementation and rollout: Monitoring
  - Define specific goals for different users or user groups
  - Constantly monitor the implementation progress
  - Collect feedback from users
  - React upon feedback immediately
  - Take corrective actions as soon as possible (provide support, solutions, workarounds)

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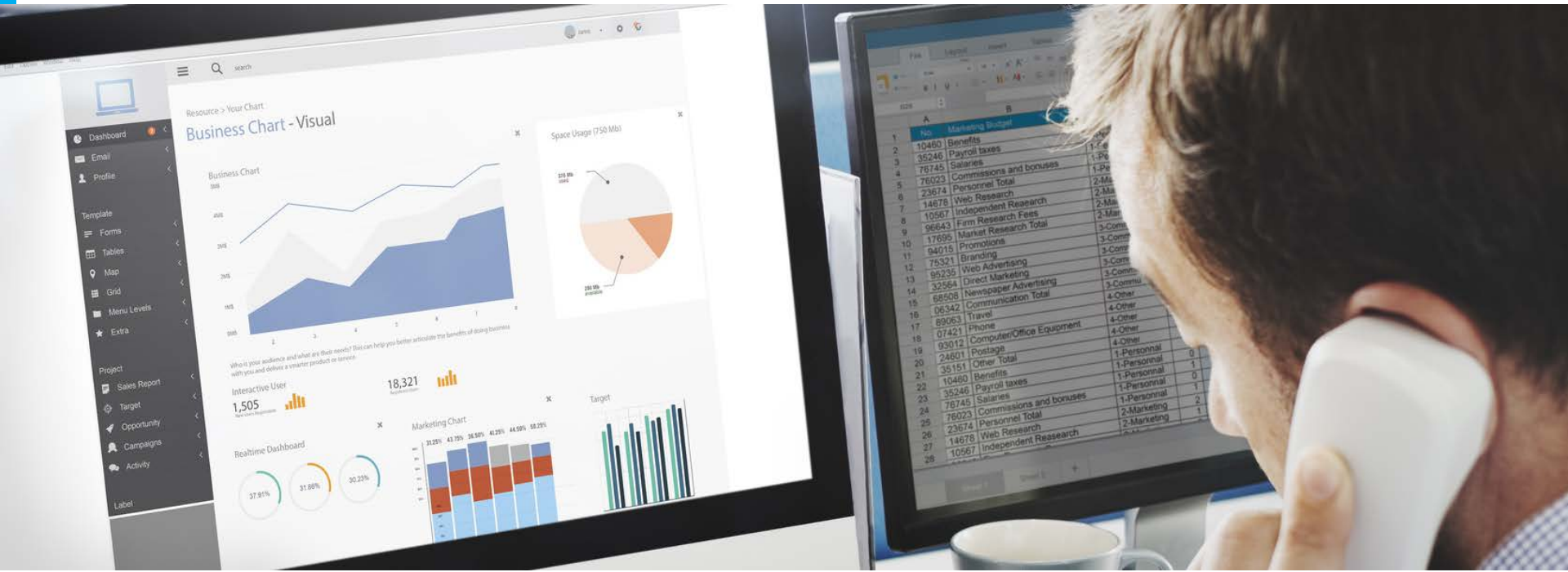
Managing change

- Managing change: Risks
  - Implementing language technology solutions means a lot of changes for an organization and its employees: New concepts, processes, workflows, systems, products, user interfaces, tasks and responsibilities.
  - Employees can quickly be overwhelmed by all these changes, feel insecure and get frustrated. This increases the risk that they start boycotting or undermining the project and go into active or passive resistance.
  - The newly introduced software then does not produce the expected results.
  - An active change management is required to mitigate these risks.

- Managing change
  - Assign a responsible change (or project) manager
  - Prepare a change management plan
  - Identify all departments and stakeholders in the organization directly or indirectly affected by the change
  - Make sure to inform all stakeholders about upcoming changes, the reasons for the changes, the improvements for all affected stakeholders etc.
  - Involve stakeholders in the process
  - Allow stakeholders to provide feedback



Continuous improvement

- Continuous improvement
  - Implementation of a feedback process
  - Define and measure KPI
  - Regular assessment of current practice
  - Evaluation of new features coming with new software products or upgrades
  - Alignment with market needs and business requirements

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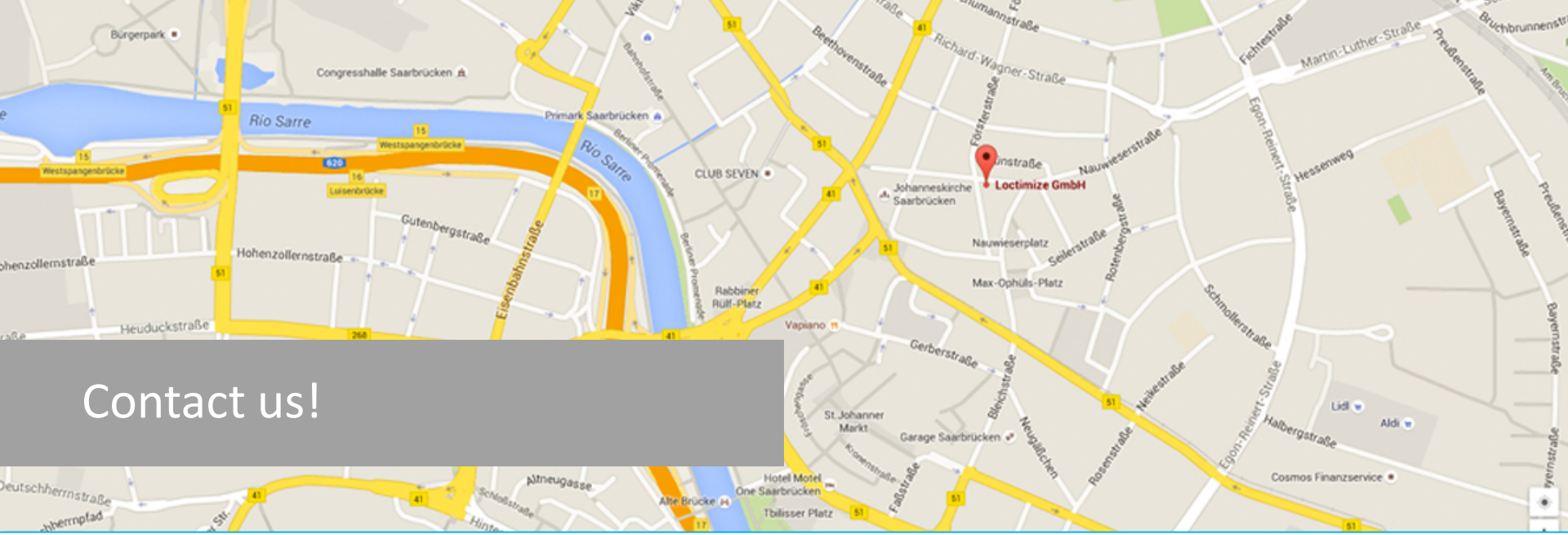
Questions?



Contact us!

Loctimize GmbH

Försterstraße 19
66111 Saarbrücken
Germany

t. +49 681 - 91038365
f. +49 681 – 91038367
e. info@loctimize.com
w. loctimize.com

loctimize