IHS Markit is the leading global source of critical information and insight in the aerospace, defense and security, automotive, chemicals, energy, economics, geopolitical risk, maritime, sustainability, supply chain management and technology industries. The company has grown steadily over the last decade through acquisition and now employs more than 8,800 people in more than 32 countries around the world, including world-class experts who shape today’s business landscape through market research and analysis.
A strong acquisition strategy helped IHS Markit grow to become one of the most recognised providers of market analysis globally, but left the company with dozens of solutions for content creation and management, from formal content management systems to labour-intensive manual workflows. The disconnected approach made it difficult for analysts, authors and designers to collaborate and deliver unified research and analysis to clients.

This challenge is not unique to IHS Markit. Large enterprise organisations across industries – banking, manufacturing, healthcare, and government – rely on content to drive their businesses but struggle to keep up with the demand to deliver the right content to the right audience at the right time. Many large organizations also struggle to manage outdated and disconnected systems for content creation and management.

In the case of IHS Markit, the need to consolidate legacy content creation and management systems went hand in hand with the bigger business goal of improving customer satisfaction. IHS Markit needed a single content platform that would allow customers to access industry coverage easily across all categories and across all research teams.

“When we started, every piece of content was in a different place. We needed to do a complete overhaul so all of the content we produce globally looks the same, under the same brand, tagged with the same taxonomy, and structured so it is made available to clients in a consistent way”, said Andrzej Dostatni, Vice President of Product Development & Delivery for IHS Markit.

**Identifying a Content Automation Platform**

A team of information technology and business intelligence experts at IHS Markit, led by Dostatni, set out to identify a platform that would allow every member of the analyst and editorial teams to create content that could be delivered to clients through a single online portal in a variety of formats, including mobile devices. For an extensive technology review, the team created a comprehensive scorecard to help gauge the viability of solutions for creating, managing, publishing and delivering multi-channel content. First and foremost, the new solution needed to be capable of replacing the many content management systems already in place. Additionally, the team required a solution that could:

- Provide structured authoring in a format-neutral way to support multi-channel content delivery to the Web, PDF, mobile and any future formats
- Offer the ability to preview all formats during the authoring process
- Improve the discoverability of content through the use of metadata and taxonomies
- Efficiently handle tables and charts, both from external sources and from within the platform
- Allow for editorial workflows that include formal processes for review, approval and publishing
- Support digital asset management
- Scale to support thousands of global users

After reviewing and even undergoing proof of concept (POC) projects with multiple solutions, IHS Markit stakeholders, from researchers, editors and analysts to production and technical teams, selected Quark Enterprise Solutions as their end-to-end content automation platform.

**Why Content Automation?**

It became clear during the evaluation process that the team’s fundamental approach to content management needed to transition from a document-centric approach (PDFs) to a content-centric approach (content components). While enterprise content management solutions failed IHS Markit in the past, a content automation platform allows for the creation of reusable content components that can be output to a variety of formats.

“We went through a POC with an alternative solution against our key criteria but from a business and technical perspective Quark came out ahead throughout the process. There was consensus among the team that Quark’s content automation platform satisfied both our business and technical requirements”, said Charles Grint, Director of Business Analysis for IHS Markit.

**Quark Enterprise Solutions for Content Automation**

Quark Enterprise Solutions is an end-to-end content automation platform that helps organisations like IHS Markit streamline the creation, management, publishing...
and delivery of multi-channel content. The platform is best suited for business-critical content that must reach customers, partners and employees at the right time and right place. At IHS Markit market research reports and analysis is business-critical content, while for other large organisations business-critical content may include product information, standard operating procedures, employee training resources and regulated content.

The Quark Enterprise Solutions implemented at IHS Markit include Quark Publishing Platform and Quark XML Author for Microsoft Word. Quark XML Author is an add-in to Microsoft Word that allows non-technical authors – such as subject matter experts and research analysts – to create structured content components in a familiar Microsoft Word environment. Content created in a structured format with Quark XML Author can be tagged with metadata that allows it to be stored, searched, updated, tracked and controlled within a central repository.

Quark Publishing Platform is the central content repository that manages content components created with Quark XML Author. It also manages previewing, review and approval workflows, and digital asset management throughout the content lifecycle. Based on rules created by IHS Markit, Quark Publishing Platform automatically assembles and delivers content in required formats, whether print, PDF, HTML5, Web, XML or content ready for tablet and mobile apps.

In addition to meeting very specific technical requirements defined by IHS Markit, the completeness and openness of Quark Enterprise Solutions factored into the team’s decision. “The fact that Quark offers an end-to-end platform is a significant benefit over other solutions. There is less integration, less chance of failure and less complexity”, said Grint.

It was also key for IHS Markit to select a platform that is globally scalable and secure and that internal teams can program and code themselves. In the past the team invested in content management systems that were too complicated to customise and maintain, so projects to consolidate legacy systems stalled.

“During our proof of concept with Quark it was important that our own team did the coding and programming, with support from the Quark engineering team. This was a major success for us and we became a partner of sorts with Quark, which benefited both our teams”, said Dostatni.

IHS Markit Connect Offers Better Customer Experience
Today IHS Markit allows clients around the world to access research reports and analysis through an online product called IHS Markit Connect. IHS Markit Connect allows clients to search by keyword or phrase across every category in the IHS Markit database of market research. IHS Markit transitioned a number of legacy systems to Quark’s content automation platform, and the rollout will continue until all old systems have been replaced. Content that is available through IHS Markit Connect via Quark’s content automation platform is authored using Quark XML Author, which ensures it can be tagged with appropriate taxonomies that make it possible to deliver the appropriate research to clients during their searches.
In addition to providing a better experience to clients through IHS Markit Connect, research analysts around the world can now collaborate through Quark Publishing Platform to access research that can be reused in additional reports or combined with other research to create new research products. Likewise, teams can now more easily reuse content in different formats – daily alerts can be repurposed into a bi-weekly or monthly reports. The benefit is two-fold: clients have more research options and IHS Markit is able to market more content.

To date, IHS Markit has migrated over 500 members of the analyst and editorial team to Quark Publishing Platform and Quark XML Author with hundreds more to migrate in coming months. Down the road the company may gauge the success of the implementation of Quark Enterprise Solutions on efficiencies gained or costs saved, but today the most important metric is customer satisfaction, which is being measured by use of and satisfaction with IHS Markit Connect.

“Our migration to a single content automation platform is not about cost savings. It is about a better experience for our customers and better content, better products”, said Dostatni.

Of the project, Grint explained, “This isn’t a technology project, it is a business project. It’s about business change and taking ownership to help make that change for IHS Markit. In the end, a lot of work needs to be done to change the way people are working, to ensure a cohesive look and feel of our research and analysis, and to help editorial teams and business lines work together. Quark’s content automation platform is helping us drive business transformation for IHS Markit.”
Managing Change to Ensure Success

Adopting a content automation platform is no small feat, but the rewards can transform your organization. What are best practices for managing a large-scale migration? Here are eight essential rules to follow from IHS Markit Operational Director Tomas Lacki:

1. Engage business leaders and get support for the project and the rollout plan. This will be essential when encouraging end users to participate fully in training and migration.

2. Conduct content inventories for every team, even if they are already on a formal content management system. You may not move the whole system at once and the inventory will help you understand which content to focus on for certain groups.

3. Once you know which groups and content you are migrating, identify a project champion for each group with at least one in each physical location, if possible.

4. Conduct training through a dedicated training group that is responsible for giving specific instruction. Make sure the training is specific to the content for each group (more on this in #6).

5. After the initial training, make sure the project champion or another mature user is available in each location. If there are items this person cannot resolve, assign a team of engineers to be on call 24 hours a day, five days a week.

6. During training, ensure users are working on the content they are familiar with, which will help users translate their old working environment to their new working environment. This is a must-do to avoid confusion!

7. Synchronise the migration of the users with the migration of the content. Find out when the users will be ready to migrate along with their content. Did they just finish a content delivery cycle? Plan the migration to sync with the beginning of the new content cycle.

8. Make the process as seamless as possible. Lock content in the system and do migration over a weekend so on Monday users come in and start on the new platform (after steps 2-6, of course).
SUCCESS STORY | IHS Markit

CHALLENGES

• Disconnected legacy content management systems unable to manage multi-channel content, impede collaboration, and prevent content reuse
• Unable to optimise content assets and authoring talent gained through acquisition
• Customer satisfaction suffering due to lack of easily accessible, timely content

SOLUTIONS

• Quark Publishing Platform
• Quark XML Author for Microsoft Word

RESULTS

• Migration to one end-to-end content automation platform enables IHS Markit to engage global client base with multi-format content through a single online portal
• Easy-to-access, timely, and multi-channel reports offer clients more value from IHS Markit analysis, leading to increased customer satisfaction
• Retirement of legacy content management systems frees IT resources to focus on bigger business initiatives
• Analysts spend more time authoring research (as reusable content components) in a familiar Word environment instead of wasting time formatting Word documents
• Additional business efficiencies will be realised for years to come once migration is complete

ABOUT QUARK SOFTWARE INC.

Quark Software Inc. develops a content automation platform that helps large organisations streamline the creation, management, publishing and delivery of business-critical content. Our solutions automate the process with reusable Smart Content components that can be dynamically assembled and delivered with precision in any format and to any channel — web, tablet, mobile, print, and more. As a result, leaders in industries such as finance, manufacturing, energy, and government can reduce costs, save time, improve consistency and make their content brilliant.

To find out more about Quark Enterprise Solutions visit www.quark.com/enterprise or contact us at www.quark.com/contact

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