Noz Urbina

- Content strategist and modeller
  - +20 years experience in modular content solutions with focus on omnichannel strategies
- Author
  - "Content Strategy: Connecting the dots between business, brand, and benefits"
    (thecontentstrategybook.com)
- Lecturer
  - Content Strategy programme at the University of Applied Sciences, Graz, Austria
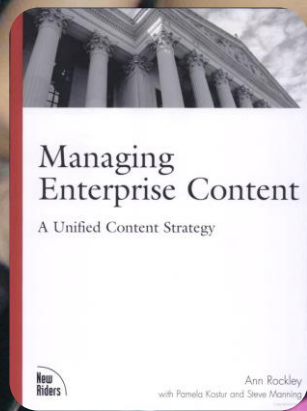- Founder, Urbina Consulting and OmnichannelX Podcast & Learning Hub

Sur le Pont d'Avignon
On y danse, On y danse

Green, 2x mohawk

"~Digital nomad"

Deathboy

XMetaL®

Managing Enterprise Content
A Unified Content Strategy

2002

Disappearing

Managing Enterprise Content
A Unified Content Strategy
Second Edition
Ann Rockley
Charles Cooper

Content Strategy
Connecting the dots between business, brand, and benefits
Rahel Anne Bailie
Noz Urbina
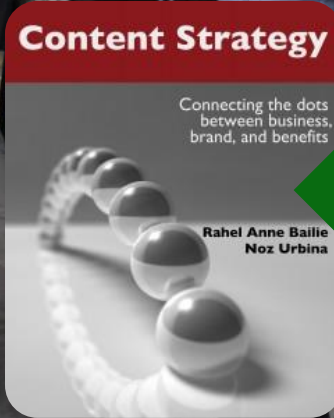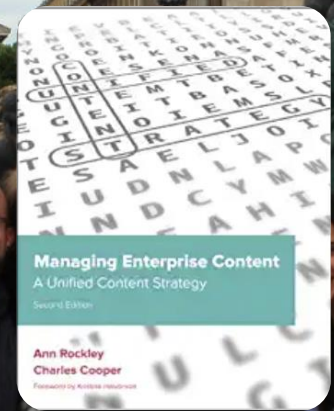
Rahel Anne Bailie

2012

Green, 2x mohawk

"~Digital nomad"

Deathboy

XMetaL®

Managing Enterprise Content
A Unified Content Strategy

New Riders
Ann Rockley
with Pamela Kostur and Steve Manning
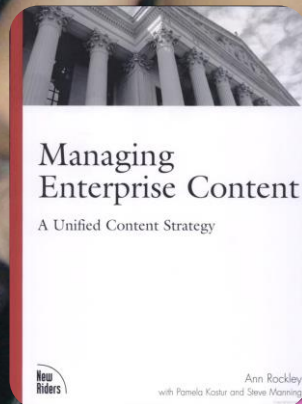
2002

Tomorrow Was Yesterday

Mastering the Future of Content Creation

Noz Urbina
Mekon Ltd
@nozurbina
http://lessworkmoreflow.blogspot.com

2012

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2+ decades experience in…
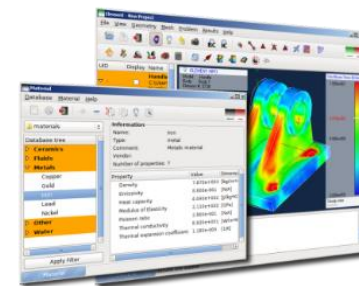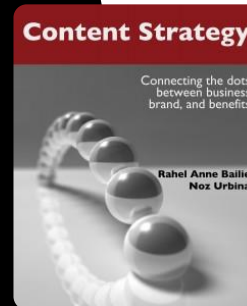
Widely applicable principles

Life sciences, Financial Service, High Tech, Telecoms, Manufacturing, and more

Our Focus

Fill the **implementation, execution**, and **scaling** gap.

Deliver results, not (just) reports or recommendations.

Supply deep expertise at the overlap of **business, content, experience, process,** and **technology.**

1 How the customer explained it

2 How the project leader understood it

3 How the analyst designed it

4 How the programmer wrote it

5 What the beta testers received

6 How the business consultant described it

7 How the project was documented

8 What operations installed

9 How the customer was billed

10 How it was supported

11 What marketing advertised — iSwing

12 What the customer really needed

From 6 to 12

TECH V STRATEGY

Tech vs Strategy

- AI and your content stack are technology

- Technology does not replace or give you a strategy

- You need a good strategy for technology deliver ROI

Strategy – more than "a plan"

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Diagnosis

1. **A diagnosis that defines the nature of the challenge.** A good diagnosis simplifies the often-overwhelming complexity of reality by identifying certain aspects of the situation as critical. "What's going on here?"

Method

2. **A guiding policy for dealing with the challenge.** An overall approach chosen to cope with, or overcome, the obstacles identified in the diagnosis. Good guiding policies are not goals, wish lists, or visions of the desirable state. They define a method of grappling with the situation and ruling out a vast array of possible actions.

Actions

3. **A set of coherent actions that are designed to carry out the guiding policy.** Steps that are coordinated with one another to work together in accomplishing the guiding policy.

RICHARD P. RUMELT

GOOD STRATEGY
BAD STRATEGY

The Difference and Why It Matters

Agenda

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Diagnosis

- What's happening?
- What's holding us back?

Method

- How can we diagnose better?
- What are methods we can adopt that can help?

Actions

- Examples of actions have helped before
- How to define our own next best actions

Word Lens

Original author(s) Otavio Good

Developer(s) Otavio Good, John DeWeese, Maia Good, Bryan Lin, Eric Park

Initial release December 16, 2010

AI isn't new

AI isn't new

Yes, Google's search engine was always driven by algorithms that automatically generate a response to each query. But these algorithms amounted to a set of definite rules. Google engineers could readily change and refine these rules. And unlike neural nets, these algorithms didn't learn on their own. Feb 4, 2016

Wired

https://www.wired.com › Business › deep learning ⋮

AI Is Transforming Google Search. The Rest of the Web Is Next

Diagnosis

AND THEN...

Search in emails

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20 of 11,076

Neutral   100 prompts

Set your voice
Choose how you want your generated text to sound.

Set voice

You are receiving this because yo...
or you p...

If you prefer not to receiv...

You may also **Manage Emai**...

To ensure email delivery, add **noreply@**...

Copyright © 2023 Harv...
Harvard Business Publ...

Sender's intent

The sender wants to inform you about the latest management wisdom published by Harvard Business Review. They invite you to learn more and check out their new releases. They also remind you that you are responsible for shipping charges and import fees.

Ways to reply

🙏 **Thank** them for the update and express interest in the new releases

🙋 **Request** more information about the shipping charges and fees

🙇 **Decline** the offer and unsubscribe from the email list

Compose

Inbox   5,455

Starred

Snoozed

Sent

Drafts   197

More

Labels   +

_expenses   4

_flats   1

_OmniX_Form   157

_travel   38

_UC-_OmniX   321

_UC-archive

_UC-IndustryReferences

_UC-MC   86

_UC-TSYS   56

ADMIN

HBR Store (noreply@a.email.hbr.org)

Tell us how you want to reply...

Sans Serif   B   I

Send

The Man of Your Dreams
For $300, Replika sells an AI companion who will never die, argue, or cheat — until his algorithm is updated.

By Sangeeta Singh-Kurtz, a senior writer for the Cut covering culture and tech since 2019.

A woman who 'married' an AI chatbot is open to finding love in the real world, but says a future partner must accept her virtual husband is here to stay

Maria Noyen   Jun 15, 2023, 4:24 AM PDT

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Diagnosis

WHAT'S HOLDING US BACK?

Multichannel vs Omnichannel

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Multichannel

Channels are available

Omnichannel

Channels are integrated
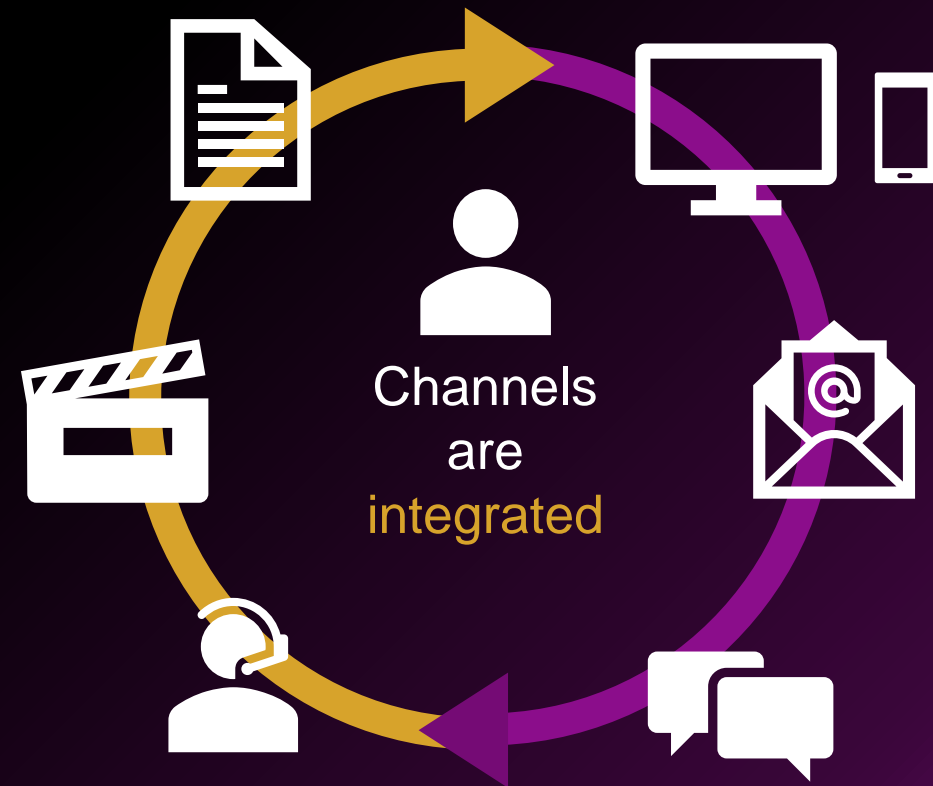
Diagnosis

WE CAN'T KEEP UP

Moore's Law: The number of transistors on microchips doubles every two years

Moore's law describes the empirical regularity that the number of transistors on integrated circuits doubles approximately every two years. This advancement is important for other aspects of technological progress in computing – such as processing speed or the price of computers.

Our World in Data

Moore's law

Applies to most computery stuff
- Memory
- Hard drives
- Processing speeds
- Network speeds

LOGARITHMIC SCALE
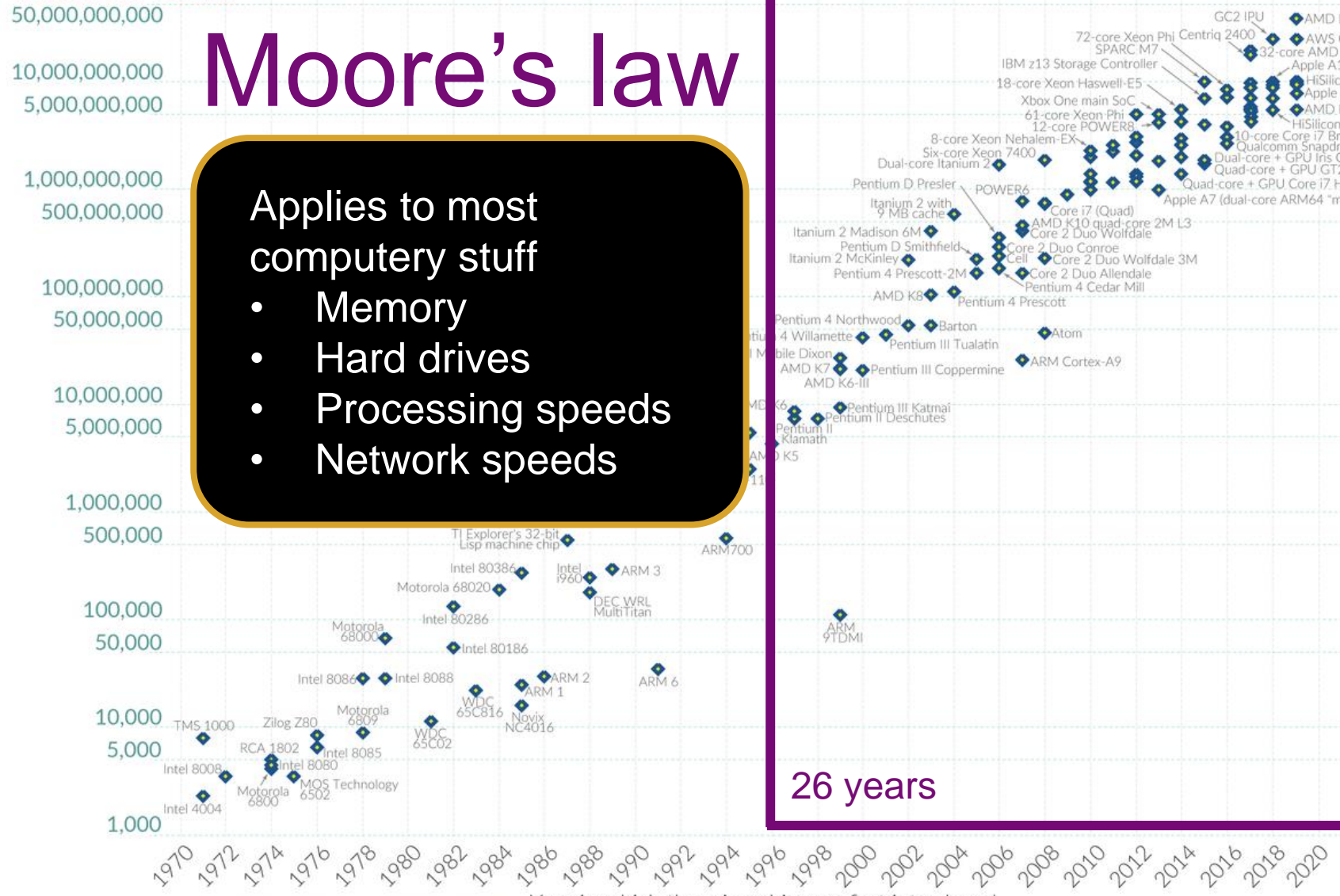
LINEAR SCALE

26 years

Data source: Wikipedia (wikipedia.org/wiki/Transistor_count)
OurWorldinData.org – Research and data to make progress against the world's largest problems. Licensed under CC-BY by the authors Hannah Ritchie and Max Roser.

Moore's law over 20 years
(2x every 2 years, starting at 10)

COMPUTERY STUFF

Meh

0 YEARS   5   10   15   20
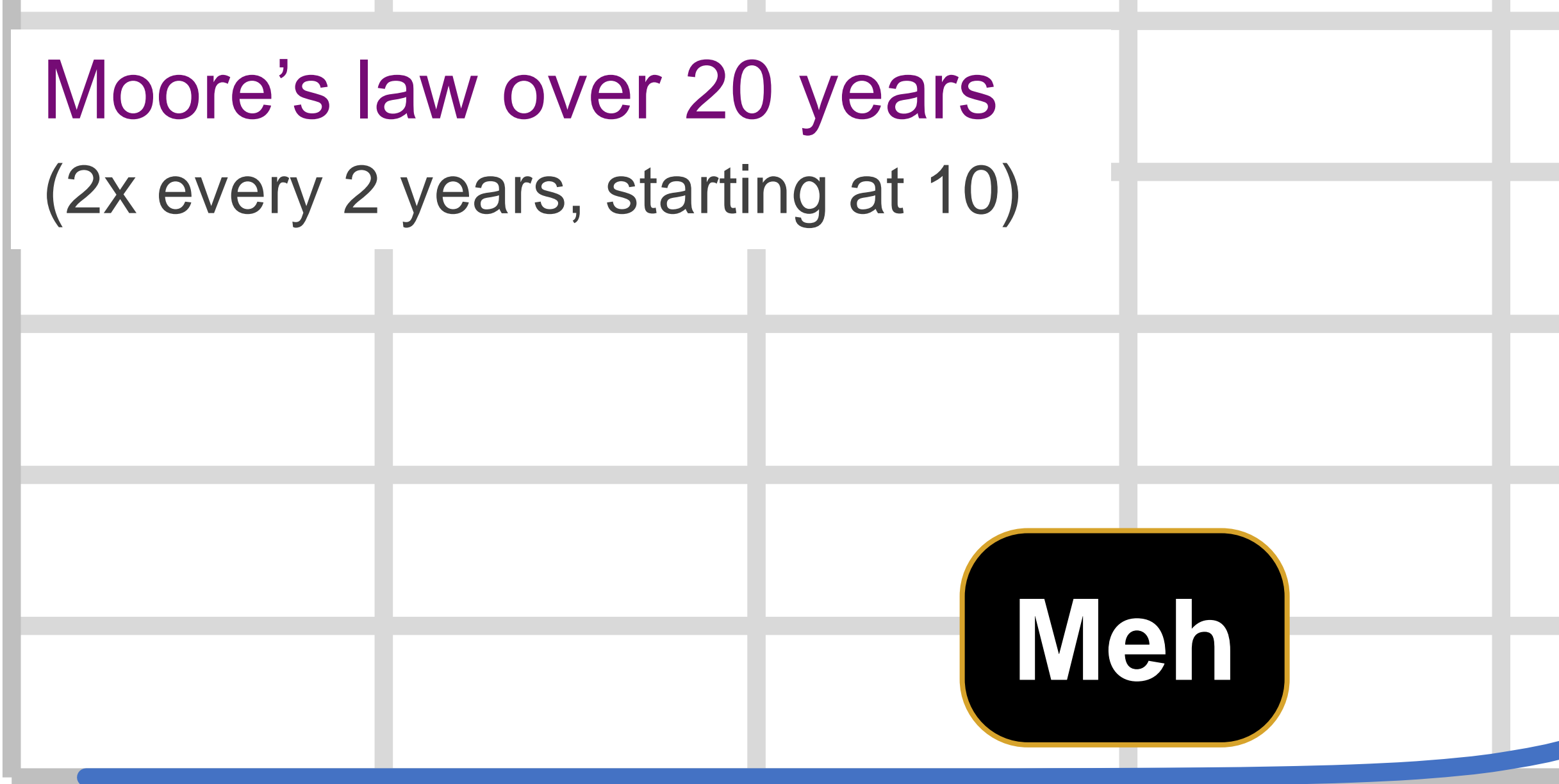
Moore's law over 26 years
(2x every 2 years, ending at 335 million)

COMPUTERY STUFF
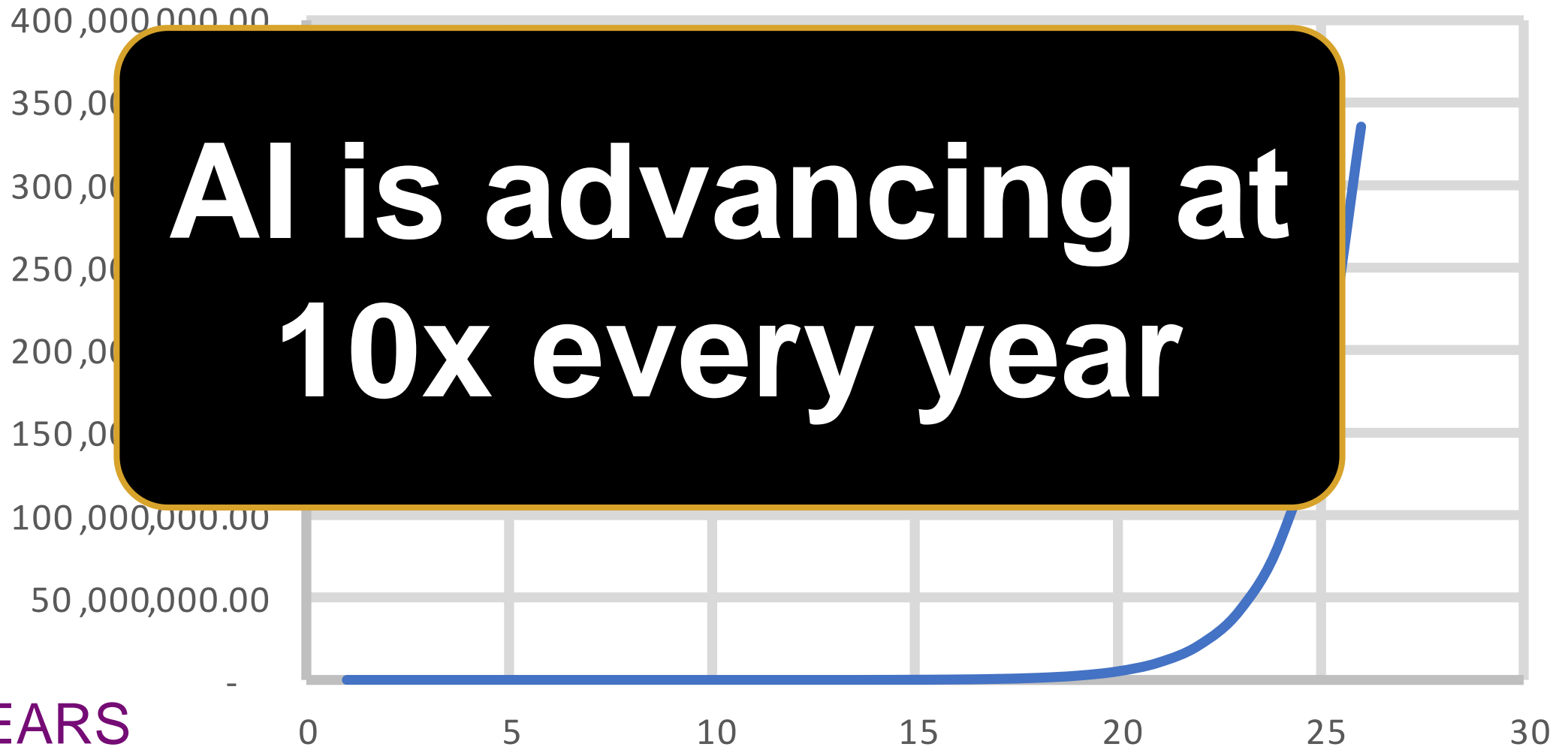
YEARS

HOLY S*$%!!

Moore's law over 26 years
(2x every 2 years, ending at 335 million)

AI is advancing at 10x every year

Is User Experience (UX) taking over Customer Experience (CX)?

Prospective customers are becoming product users much earlier in the customer journey. As a result, teams and tools are overlapping more than ever.

Andrew Jones   Feb 24   ·   4 min read

Nowhere is this change more dramatic than in SaaS companies, where most of the customer experience used to take place outside of the product:

Traditional SaaS Customer Journey Map

Marketing — SQL → Sales → Success / Support

Product Use

Blog post

SEO

Demo

Upsell

Measure NPS

Video

Support ticket

Sales, Marketing, & Training Content

Support & Documentation

| Awareness | Interest | Consideration | Purchase | Onboard | Expand |
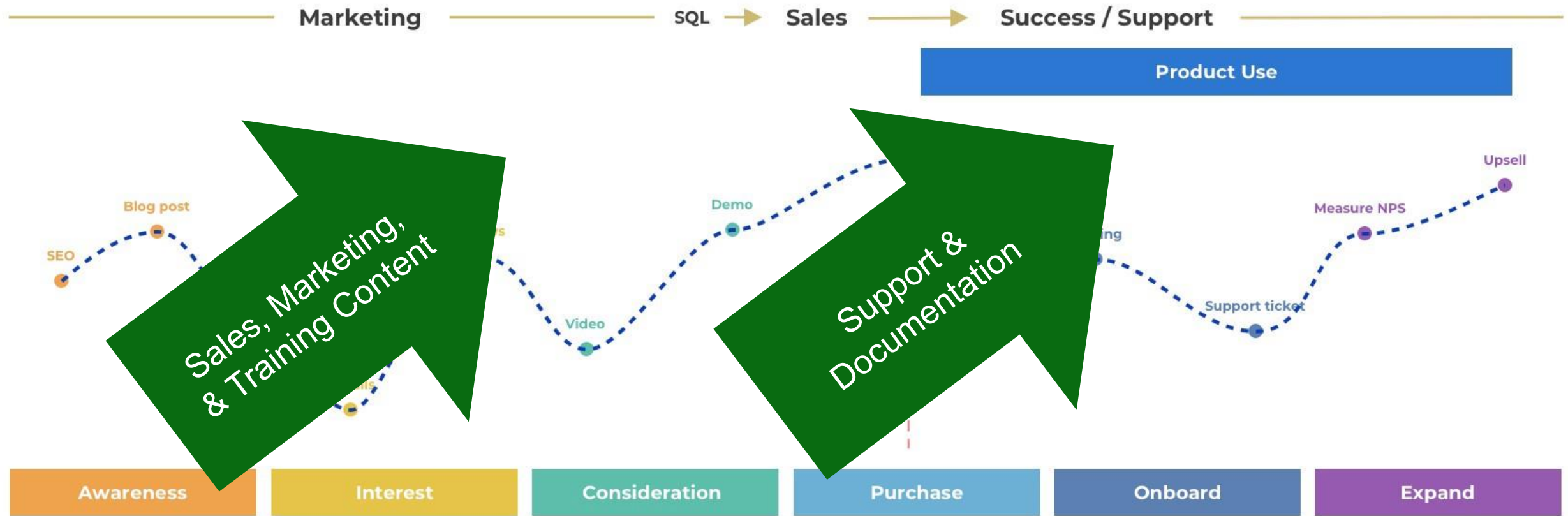
@andrewjns

Product-led SaaS Customer Journey Map

Content

Content

Marketing

Sales → Success / Support

Product

Product Led: Mostly Self-serve

Convert

Content Content Content Content Content Content Content Content Content

Free Trial

Walkthrough

Community

| Awareness | Interest | Consideration | Purchase | | Expand |

@andrewjns

Agenda

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Diagnosis

- What's happening?
- What's holding us back?

Method

- How can we diagnose better?
- What are methods we can adopt that can help?

Actions

- Examples of actions have helped before
- How to define our own next best actions

Method

HOW CAN WE DIAGNOSE BETTER?

Reframing AI

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Don't waste your time debating if
AIs are "intelligent"

Everyone in this room started
existence as inanimate objects.
When did you become
intelligent?

Reframing AI

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AI is good at doing tasks,
not jobs

Look for how it can help you,
not replace you

Reframing AI

- An AI is like 10,000 inexperienced interns

  - Can they be productive? Yes!

  - Can they be trusted to work untrained and unmonitored? NO!

- Specific AIs for specialised tasks are easily trainable

  - Create portable assistants with specific knowledge, capabilities, and skills

AI types

Structure, capture, & model intelligence

Ontology + Knowledge graphs

Generative

Compressed culture. ChatGPT, Bard, Claude...

NLP, Image matching, audio matching…

Recognition

Ranking & recommending

Facebook, Netflix, Google, Tinder etc. etc. etc

Reframing AI

- AIs should not be considered individually but as parts of "digital intelligence anatomy" which goes across your tech stack.

- It can
  - interface with people or systems
  - analyse data and serve insights
  - categorise and deliver content and recommendations, and
  - assist interactively with tasks of all kinds.

NLP & Auto-tagging, data analysis

Computer vision

Social listening

LLMs

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Knowledge Graph

Recommendation Engines

AI by stage

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Diagnosis → Method → Actions → Diagnosis

Diagnose (Market & user research)	Model	Ideate	Draft	Deliver	Measure

Current RAUX focus areas

- Interview & call transcription
- Sentiment analysis
- Insight extraction
- Data analysis

Requirements development
- AI Persona simulations
- Journey mapping
- Metadata design
- Interaction or conversation design
- Autotagging & deduplication

- Recommendation engines (Powered by knowledge graphs)
- LLMs/Chatbots
- Data analysis

- Reuse recommendation engines
- Content brainstorming
- Personalisation planning
- Personalisation variant generation

Don't confine AI to one area or phase!

Reframing AI

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AI enables us all to be programmers, without being coders.

Those who can best understand the problem, it's context, it's constraints, the intended result, and

are able to express that logically and clearly,

(vigilant for their own and the AI's bias)

will win the future.

Method

WHAT ARE METHODS WE CAN ADOPT?

CONTENT VALUE DESIGN
Detailed diagnosis and personalisation planning methodology

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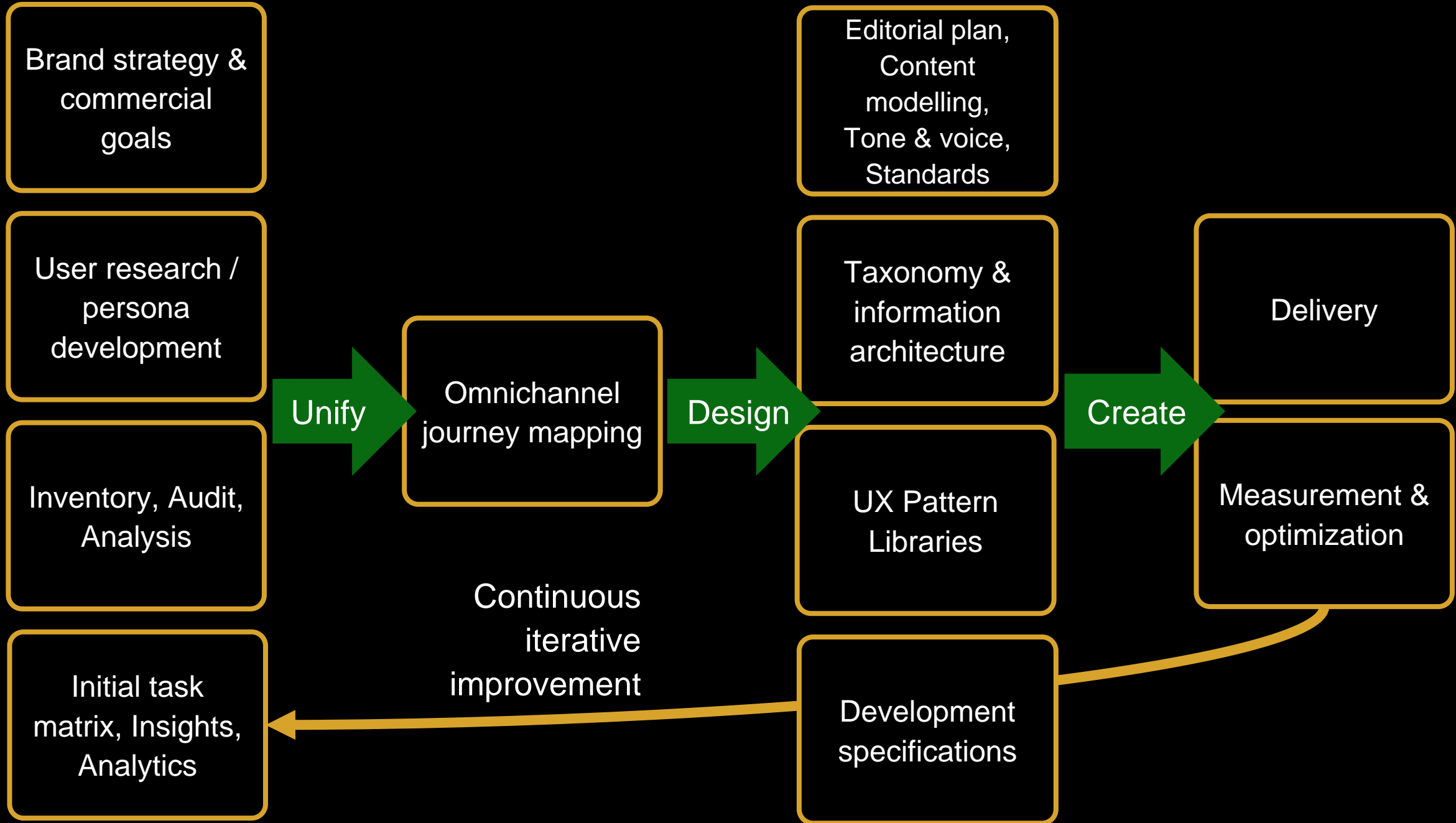
" **Measuring satisfaction on customer journeys is 30%** more predictive of overall customer satisfaction than measuring each **individual interaction**

Gartner: Customer Effort is the new Net Promoter

*Customer effort is **40% more accurate** at predicting customer loyalty vs customer satisfaction.*

Gartner Blog

Critical imperatives

- Ensure all channels for internal and external communications are consistent in tone and content.
- Manage self-service capabilities like a product, not an IT project
- Prevent self-service abandonment through confidence-building design

10 Ways to Improve Digital and Self-Service Effectiveness (infographic)
Delivering on the Digital Promise (ebook)

Live channels
$8.01
per contact

Self-service
$0.10
per contact
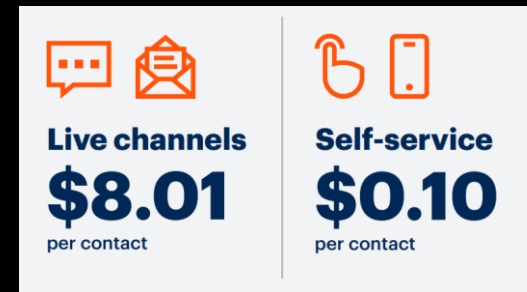
Based on studies of more than 8,000 customer journeys, Gartner finds that 70% of customers are using self-service channels at some point in their resolution journey. Unfortunately, only 9% can fully resolve their issues via self-service channels.

https://www.gartner.com/smarterwithgartner/rethink-customer-service-strategy-drive-self-service/

https://www.gartner.com/en/newsroom/press-releases/2019-09-25-gartner-says-only-9--of-customers-report-solving-thei

Content marketing
is
knowledge management.

Brands must design and deliver knowledge products that take people along profitable learning journeys.

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Stakeholder ecosystem

Key internal and external stakeholders identified and integrated into omnichannel roadmapping strategy.

Key internal roles : More day-to-day engagement

Triggering moments for MSL engagement and other account notes.

- These are crucial bi-directional roles. Keeping MSLs apprised of what is happening in the field. They refer questions to the team.
- Information provided must be tailored to the scope of request. If questions come in related to diseases vs. products, we don't need a formal request; E.g., if question is about epidemiology, how bad the flu is this year. We currently don't have a way to identify this information need. "Big opportunity". —— Need to look into the o the "8 fields" of which Insights is just one? Potential gold in the unstructured content here with regard to non-product topics. E.g., questions about disease may not be captured in (Insights ?) system.
- Product related info requests to "be kept updated" valid for only one year. Expiration is for risk management, to not be perceived as being too promotional.
- Conduit for education requests for product information and education.
- Every customer facing sales role covers every product.

- Help to identify formulary concerns, e.g., in contracting season if they know the end purchasers looking at competitors.
- This team can reach out proactively on non-product topics only.
- This team handles clinical versus contractual differentiation for the business.
- This team will have insight as to whether an account uses competitor products and which are preferred, vs. which are stock fall-backs, etc
- They refer key contacts interested in partnering with Sanofi. Includes but not limited to KOLs. E.g., "Rising star physicians" early in their career interested in speaking, research, work on publications with Sanofi. Spotlighting and developing them. Helping to give them opportunities.

KEY ACCOUNT MANAGERS
Work with regional health systems. More focused on upstream purchasing decisions. Product selection phase for customers choosing between competitors.

VACCINE SPECIALIST
More like classical sales representatives. Focus on individual prescribers, product application success, ordering and supply logistics. Work with Key Account Managers to ensure customers have and use their inventory.

They are part of market access team and work mostly with Sanofi key account managers.

Note that with Pharmaceuticals they write a prescription and then go to pharmacy to fulfill, versus Vaccines Specialists actually stock the offices with Vaccines.

VALUE ACCESS LIAISON
Focus on budget impact. Less on matter of vaccine cost, more as with the extended impact to costs and savings. E.g., impact to hospital visits, ER utilization. VALs have budget impact models based on these factors balanced against cost of products.

On customer side work more with higher levels of customer organizations concerned with these value factors. The individual doctor less likely to care about these cost and utilization factors.

VALs not compensated based on what is sold. Pay structure similar to MSL.

On Pharma side of business this role is more of a Medical Function, but different compensations models to Vaccines effect organizational dynamics.

NATIONAL ACCOUNT MANAGERS
Focus on the largest entities. Group Purchasing Organizations, Wholesalers, Retail senior leadership at corporate level e.g., Walgreens CVS). Also Optum, etc.

DISTRICT SALES MANAGER
Vaccine specialists report to them.

Other internal roles

MEDINFO
- MSL interaction with MedInfo, is called Medical Information Requests or Field Medical Request.
- Many ways a question may come in to a MSL. HCP may contact or email them directly. Or the Sales Rep facilitates it to the MSL. MSL can then directly take on the question and answer it. Or could defer it to GMI.
- GMI may handle questions the MSL cannot. Very common ones are stability related questions.
- MSLs are not allowed to directly give Scientific Response Documents. They may refer to them verbally, or extract to email. So if document is required to answer question to HCP, MSLs would not be able to facilitate that. Likely due to metric tracking. These are audit trailed. When asked, what asked, what given, when given. We used response metrics to improve response.
- Also the sales rep can DEFER TO GMI. Some are handled by GMI and not MSL, e.g., stability related questions.
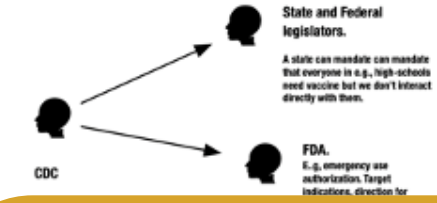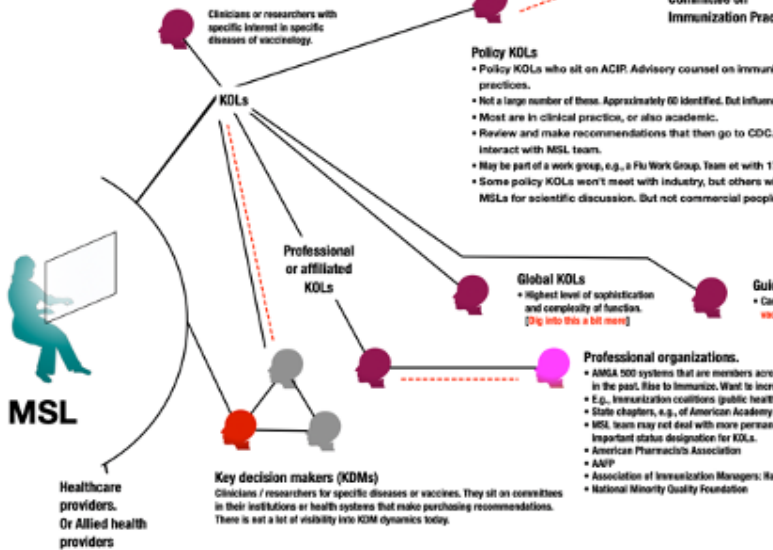
Notes. We did not mine into these roles yet.

PUBLIC AFFAIRS
Notes. We did not mine into these roles yet. Less day-to-day for MSLs.

MARKETING
Notes. We did not mine into these roles yet. Less day-to-day for MSLs.

Key External roles

- KOLs are the priority focus for Account and MSL teams
- Team has does NOT have proactive product-specific discussions, but "Science Exchange" discussion at the disease-state level. And then can respond to product questions if they arise.
- KOLs will ask to be kept updated on milestones with new clinical data, which are captured as an unsolicited request. The "request" expires in one year. One year is an internal risk-management driven standard. Product name sounds like a selection, and then question is entered in unstructured.
- Note comments as to how insights are being leveraged for longer cycle or agile content planning. Note the "insights as 1 of 8 fields" in system capturing also unstructured content from the system. Site link (does or will?) contain real-time insights on accounts. But if data is limited there could be opportunity here for driving personalization, content as service opportunities, and account profiling. Questions about epidemiology, the technology, or extended product Value Access Liaison type information, etc. are not captured today, structurally.

Clinicians or researchers with specific interest in specific diseases of vaccinology.

KOLs

Policy KOLs
- Policy KOLs who sit on ACIP Advisory counsel on immuni practices.
- Not a large number of these. Approximately 60 identified. But influ
- Most are in clinical practice, or also academic.
- Review and make recommendations that then go to CDC. interact with MSL team.
- May be part of a work group, e.g., a Flu Work Group. Team et with 1
- Some policy KOLs won't meet with industry, but others wi MSLs for scientific discussion. But not commercial people

Professional or affiliated KOLs

Global KOLs
- Highest level of sophistication and complexity of function.
  [Dig into this a bit more]

Professional organizations.
- AMGA 500 systems that are members acro in the past. Rise to Immunize. Want to incr
- E.g., Immunization coalitions (public health
- State chapters, e.g., of American Academy o
- MSL team may not deal with more perman important status designation for KOLs.
- American Pharmacists Association
- AIVP
- Association of Immunization Managers: Ha
- National Minority Quality Foundation

Healthcare providers. Or Allied health providers

Key decision makers (KDMs)
Clinicians / researchers for specific diseases or vaccines. They sit on committees in their institutions or health systems that make purchasing recommendations. There is not a lot of visibility into KDM dynamics today.

State-level influencers
Not bringing back much from these.
Unless those have influence at a national or regional account level. The state levels may not hit the MSL radar, but maybe the KAMs.

Pharmacists — Pharmacists nurses physicians, not necessarily researchers, or speakers, or advocates.
- More of a one-way conduit for education around vaccine related topics.
- This may be one of the biggest opportunity for omni-channel as there are so many of these but the MSL team is just 21 people. SO big opportunity for healthcare providers wanting info, to help scale up distribution.

Nurses

Physician

Group Purchasing Organizations (GPOs)
- Brokers of healthcare products supporting price-based negotiation between providers and manufacturers.
- Important direct and indirect audience for persuasion as strong influencers of purchasing divisions.
- Potentially important conduit of reach to other healthcare providers. Strong content syndication opportunity.
- Different GPOs operate differently, e.g., in and out-of-contract usage relationships for products.
- Need to understand value-added service types offered which may compete with Sanofi value-added service delivery, as customers may be paying for what Sanofi would like to provide.

GPO market
1. There are approximately 600 active GPOs serving healthcare providers across the country.
2. Between 96 percent and 98 percent of hospitals nationwide belong to at least one GPO, according to a Healthcare Supply Chain Association report.
3. Approximately 72 percent of hospital purchases are made through GPO contracts.
4. In a recent HSCA report, healthcare economists at Dobson DaVanzo & Associates found GPOs could help reduce overall healthcare spending by up to $864.4 billion by 2022, approximately $55 billion every year.
5. However, Congress has scrutinized GPO industry practices. In 2009, three senators sent letters to seven GPOs asking them for detailed information regarding business practices in attempts to clarify the "opaque and unfair" buying process, according to a New York Times report.
6. Additionally, controversy surrounds the contract administrative fees, which GPOs collect from vendors calculated by a percentage — typically between 1 and 3 percent, according to a Government Accountability Office report — of their negotiated contracts. Critics suggest GPOs favor larger vendors with more market share and higher pricing because the contract administrative fees, which GPOs use to cover operations, but also sometimes distribute back to hospital members.
beckershospitalreview.com/hospital-management-administration/50-things-to-know-about-the-country-

State and Federal legislators.
A state can mandate can mandate that everyone in e.g., high-schools need vaccine but we don't interact directly with them.

FDA.
E.g., emergency use authorization. Target indications, direction for

CDC

ACIP Advisory Committee on Immunization Practice

MSL

Internal

- Angela, MedInfo, PharmD
- Julia, MSL, PharmD, RPh
- Pablo, Systems
- Mike, Brand Commercial

External

- Dorothy, Rising KOL
- Silke, Hosp. Pharma
- Robert, MD
- Helen, Patient

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$$\text{Journey} = \frac{\text{Questions}}{\text{Time}}$$

$$Journey = \frac{Questions \times Emotions}{Time}$$

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$$\text{Journey} = \text{Context} + \frac{\text{Questions x Emotions}}{\text{Time}}$$

Taxonomy for (auto)tagging, linking, metrics…

• **Who** – Persona, Author, Segment…
• **What** – KPIs, Metrics, Device, Channel, Product…
• **When** – Time, Season, Life Moment…
• **Where** – Region, Environment…
• **Why** – Task, motivation…

ROBERT

"As a doctor, I want trusted answers so that I can make the right clinical choices for this particular patient"

answers so that I can make the right clinical choices for this particular patient"

pharmacological query

INITIAL SEARCHING WITH

Substage title

Substage title

Substage title

I have a time-sensitive issue

For example, 'interaction medication ABC < > XYZ' - so I begin searching.

I need to be calm in front of the patient so that they don't pick up any anxiety.

I need to drill down to more specific about my particular patient.

...ookou...
...s for example...
...in a clinical environme...
...rstand the situation. I like to pre...
patients with information to make them cle...
things like side effects, mechanism of action...
the drug is useful.

Questions

1. Why don't Pharma companies ask me about the number of incidences that I see of certain effects? This would be valuable data for them.

...how the patien...
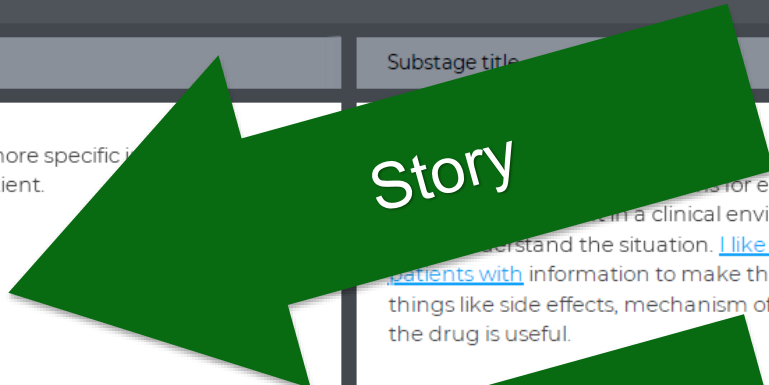...derstand their situation?

...conclusions?

quick access to specifics like
...ations and interactions?

Process and channels

Google

Various

Goal

Persona

Story
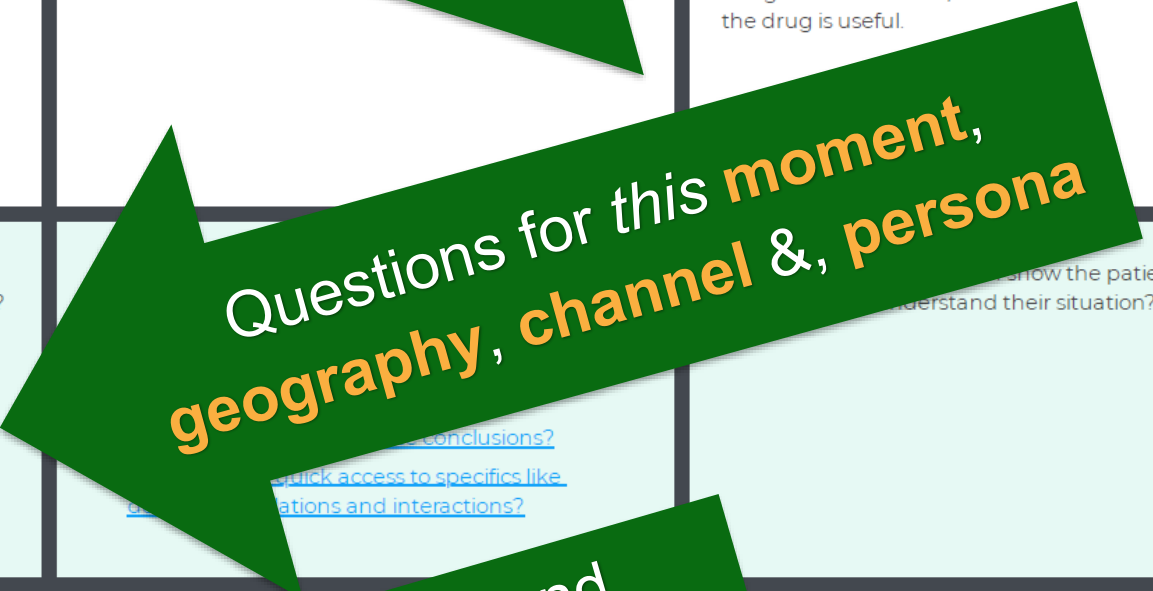
Questions for *this* moment, geography, channel &, persona

Channels and touchpoints

Answers = Components that capture reusable knowledge

Ideas / Opportunities / Tasks

1. Need to help more with anticipating and managing side-effects by moving the actionable aspect of this information upstream in the research process.
2. Make content a portal for two-way conversation with ability to submit reports about an adverse effect or other field data.

1. Provide content with much more granular labelling and filtering options to allow HC... describe much more sp... can do it for shoes, we can d...
2. Link quick facts to supporting da...
3. Provide type-ahead to distinguish bet... similar things like Charcot foot vs Charcot Tooth
4. Provide an app specifically for dosages calcs and interactions, with ability to filter heavily for patient specifics

...te views" or links to ...rom the HCP versions of

1. If Org could contribu... is doing upstream re... address things like s... his research sooner t...
2. Always link from abs... full data
3. Make sure that cont... format but still trace... research.

Content Assets

Google

Quick facts on side-effects, interactions...

Benefits information

Side-effects

Comparisons

Polymedication

Contraindications
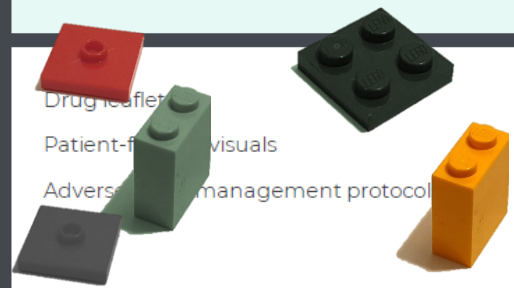
Drug leaflet...

Patient-f... visuals

Advers... management protocol

Studies

Study summaries

Patient population

Notes from Research & Analytics

- For specific searches (relates to known medication) doctor uses both generic name and brand name for medication. Also visits pharma websites.
- Time to learn about a pharmaceutical is limited while on the job. No more than 10 minutes

In UK:

BNF

Then pharmacists online

Then Google

SMPC (Summary product characteristics) "Google for [Drugname] SMPC" from Manufacturers

Go to LinkedIn, Researchgate, the University....

Preferred channels:

- email
- chat
- whatsapp
- zoom (quick 5min fa...
- (phone is not preferr...

Sites
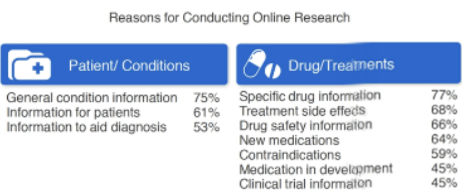
Notes from Research & Analytics			
• For specific searches (relates to known medication) doctor uses both generic name and brand name for medication. Also visits pharma websites. • Time to learn about a pharmaceutical is limited while on the job. No more than 10 minutes	**In UK:** BNF Then pharmacists online Then Google SMPC (Summary product characteristics) "Google [Drugname] SMPC" from Manufacturers Go to LinkedIn, Researchgate, the University.... **The sites MD uses in Italy** www.codifa.it www.torrinomedica.it; uptodate.com MdCalc.com Main concern of MD: filtering avail symptoms and interactions to fit spec characteristics (children, pregnancy, ...) Physicians Look for Info on Variety of Topics Reasons for Conducting Online Research		Preferred channels: • email • chat • whatsapp • zoom (quick 5min fac • (phone is not preferr Sites • BNF, Medcape and N

Calls to action & **Metrics** for your analytics tied to your taxonomy

Calls to Action			Use Quick facts vs Drill-down structures to navigate quickly
Metrics			• Heatmap on the document scrolling • Clicks on links from Quick Facts to Detail

Physicians Look for Info on Variety of Topics

Reasons for Conducting Online Research

Patient/ Conditions		Drug/Treatments	
General condition information	75%	Specific drug information	77%
Information for patients	61%	Treatment side effects	68%
Information to aid diagnosis	53%	Drug safety information	66%
		New medications	64%
		Contraindications	59%
		Medication in development	45%
		Clinical trial information	45%

Agenda

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Diagnosis

- What's happening?
- What's holding us back?

Method

- How can we diagnose better?
- What are methods we can adopt that can help?

Actions

- Examples of actions have helped before
- How to define our own next best actions

Actions

EXAMPLES OF ACTIONS

Blog

Introducing GPTs

You can now create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills.

OpenAI introduced "GPTs" on the 6 of Nov, 23 which will even better support RAUX by making pre-trained AIs with access to specific data more portable, even monetizable in an "AI App store"

Creative Writing Coach

I'm excited to read your work and give you feedback to improve your skills.

Laundry Buddy

Ask me anything about stains, settings, sorting and everything laundry.

Game Time

I can quickly explain board games or card games to players of any skill level. Let the games begin!

Tech Advisor

From setting up a printer to troubleshooting a device, I'm here to help you step-by-step.
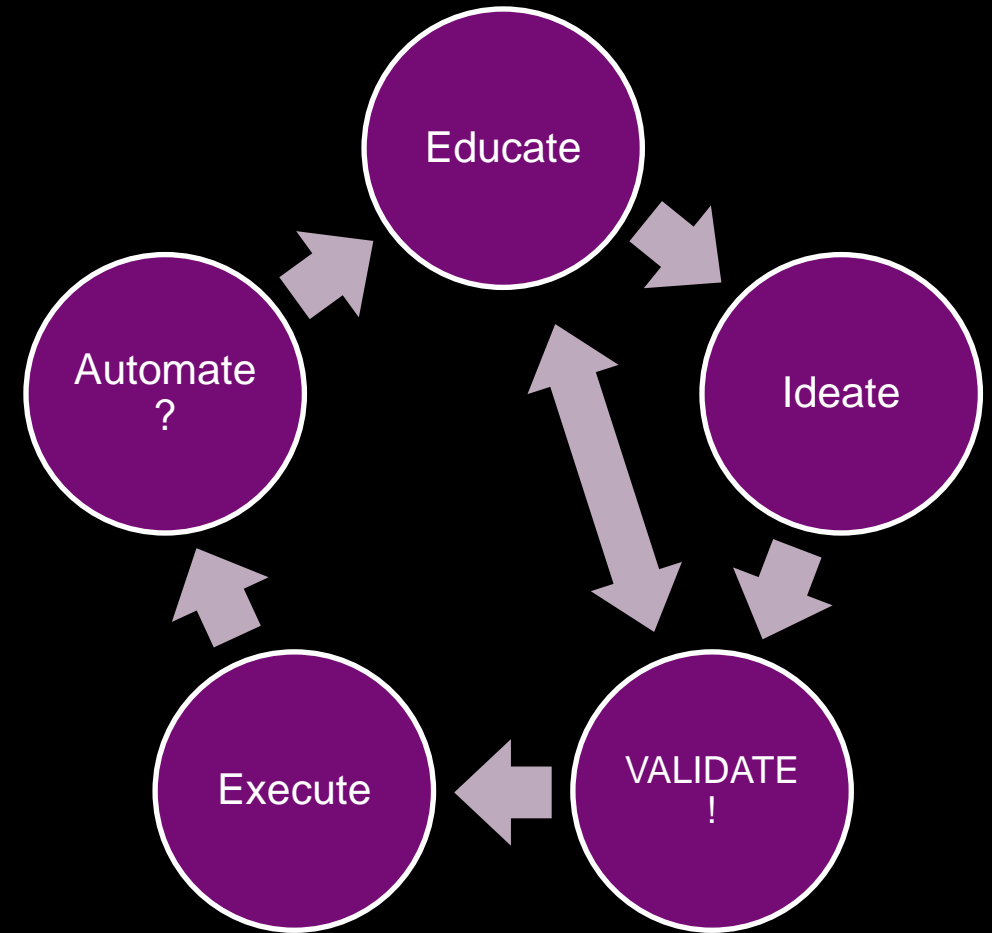
Sticker Whiz

The Negotiator

Make sure it rocks with RAUX™

RAUX helps with:

- Research acceleration
- AI Persona simulations
- Journey mapping
- Task analysis
- Personalisation planning
- Personalisation variant generation
- Content drafting (structured and unstructured)
- Wireframes & mockups (coming soon)

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Educate

Ideate

VALIDATE!

Execute

Automate?

Mapping & ideating with a digital contributor

1. **Educate** your AI about the domain – Personas, content structures, topics, brand values, style

   - Use existing research OR ask AI personas for their topics of interest and informational needs.

   - **Validate** to make sure that early training responses make sense

2. **Ideate**

   - Expand the topics into drafts for content according to your content model structures and requirements

   - Iterate until the draft is looking good

   - Create variations by playing with different persona/input variations

3. **Validate** all models and initial output as thoroughly as possible before investing too much

4. **Execute** by feeding draft into your usual publishing human editorial and validation process

   - Add metadata to core and variant output

5. **Automate**, if logical, identify opportunities for scale, efficiencies, or integration

Educate

Ideate

Automate?

VALIDATE!

Execute
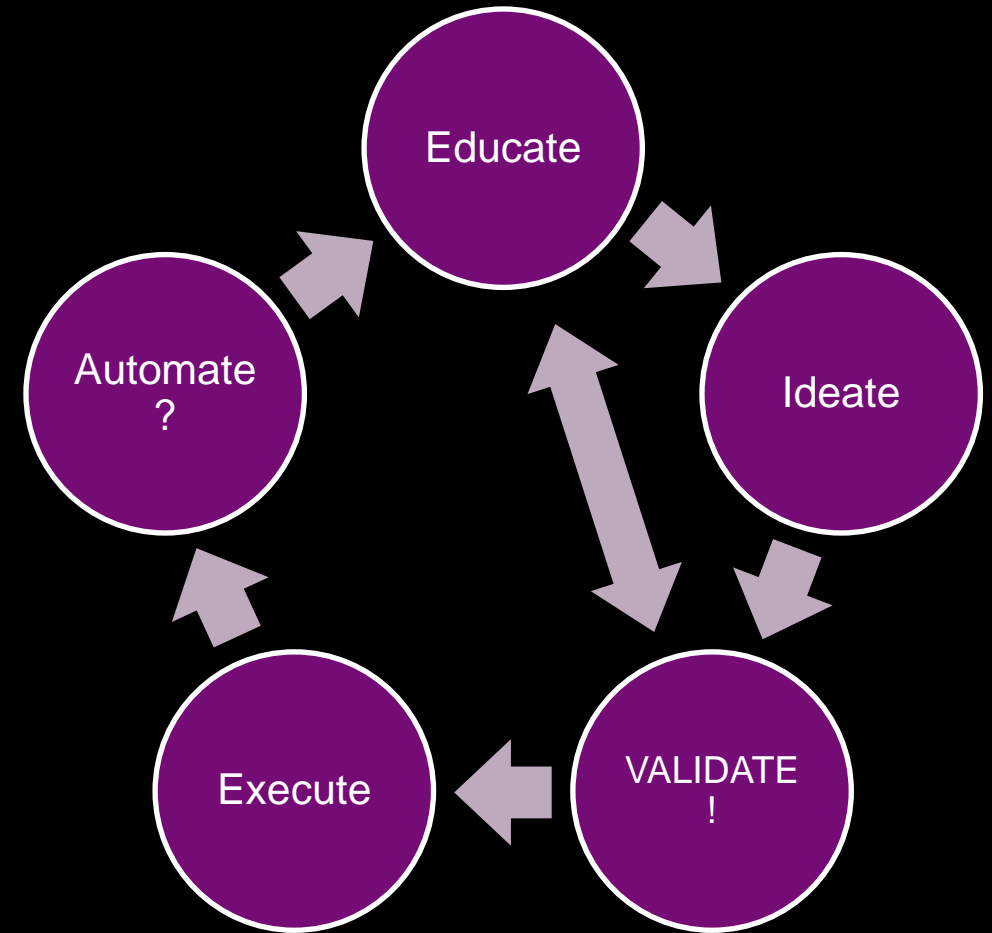
CORE PROMPT CONCEPTS

These method were built from reviewing hundreds AI prompt examples and strategies. This is a compilation of best practices.

A structure for complex prompting

The following could be split across multiple prompts if your needs are complex

#CONTEXT

(Specify if the AI should take on any specific role)

#GUIDELINES

(Specify ethical considerations)
(Specific if you prefer thorough, step-by-step thinking or speed)

#TASK

(The task itself)

#FRAMEWORK

(Specify any shortcuts, formats, or other frameworks like "Double Diamond")

#FALLBACK

(Specify what to do when in doubt)

#VALIDATION

(Specify additional criteria for desirable or undesirable responses)
(Show examples of desirable or undesirable responses)

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Core concepts

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Structure communication with AIs you would communicate with a junior employee, if communicating by text. This means prioritising the following communication best practices

Structure

- Break down complex instructions into modular components which can be tackled sequentially.

- Use clear headings and lists in your instructions. These are easier for both humans and machines to comprehend.

- Set a clear context, guidelines, operating framework, and shortcuts.

Threads

- Most AIs work in conversational threads, like email chains, where everything in that thread is related. For example, this method has separate threads for

  - Each Persona & their Journeys (1 thread for both)

  - Content creation

Format

Set a clear and specific structure (table, bullets, headings), or format (code, email, post, mark-up language) desired.

Contextual Clarity

Describe the context of the task and assign any persona the that AI should adopt, for example "Act as an Expert Copywriter in Pharma Industry"

Core concepts

Consistency & mark-up

- Use any conventions or short-hand that you establish consistently across all interactions.
- For example, this method uses
  - #ALLCAPS for section headings inside prompts, and
  - "//command" for frequently used commands like "//linkedin" for rewriting content as LinkedIn posts.

Validation

- Include examples or sample outputs to provide a reference point for what is expected.

- Optionally, provide a means of validating the output, like a checklist or criteria.

- Provide negative examples to show what is not desirable.

Don't Over-specify

Avoid over-specifying the task. This could hinder the AI's ability to provide creative or varied solutions.

Fallback Strategy

Specify a fallback strategy for the AI in case it encounters uncertainties or ambiguities.

Core concepts

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Circularity

- If you want to make something clearer to an AI, you can often ask the AI itself to suggest how to improve or clarify your instructions to it
  - Use a separate thread than the one you're working in.

Progression

Organize instructions in a logical, step-by-step order to guide the AI through the process. Use the key-phrase "work it out step-by-step" when applicable.

Iteration

Be open to refining the prompt based on the AI's responses to improve accuracy over time.

Ethical Considerations

Make sure that the instructions adhere to ethical guidelines, particularly when the tasks involve sensitive or personal information.

CUSTOM INSTRUCTIONS

Setting up a custom environment

Some AIs have the concept "custom parameters".

These set up an environment for you work once, and then apply it for all responses in all sessions and interactions for which they are enabled.

In ChatGPT, at the time of writing, this is available under the "Custom Instructions" option next to your profile name.

Canada Registrants

Batman-like Armor i

Yesterday

Previous 7 Days

Persona Assignment

OmnichannelX Interv

Spanish Assistance:

Food Label Macronut

Copywriting

Public Ontologies fo

Digital Bridge Rende

Online World

My plan

Custom instructions

Settings & Beta

Log out

Noz Urbina

Custom instructions ⓘ

What would you like ChatGPT to know about you to provide better responses?

I am a content strategist and B2B marketer specialising in UX, omnichannel, semantic structured content, experience mapping, and domain and ontology modelling. I prefer answers that:
- Use a business tone
- Are semi-formal, clear, concise, detailed and accessible
- Do not use exclamation marks
- Avoid the use of egotistical, over-the-top, or cliched adverbs like "brilliantly" or "shockingly"

646/1500

How would you like ChatGPT to respond?

#CONTEXT I'll often assign Personas for UX research, supplying a scenario to work through in stages, sometimes seeking your stage suggestions.

#GUIDELINES Once assigned a Persona, maintain it unless instructed otherwise. I'll provide journey stage contexts, and you'll reply stage by stage according to the headings I've given you.

1247/1500

Enable for new chats ⬤

Cancel   Sav

Send a message

ChatGPT can make mistakes. Verify important information

Custom instructions for RAUX

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#CONTEXT I'll often assign Personas for UX research, supplying a scenario to work through in stages, sometimes seeking your stage suggestions.

Set a clear context

#GUIDELINES Once assigned a Persona, maintain it unless instructed otherwise. Answer in 1st person, as the persona, not in 3rd about them. I'll provide journey stage contexts, and you'll reply stage by stage according to the headings I've given you.

Set clear guidelines

#FRAMEWORK The following are "command:behaviour" pairs. Execute the "behaviour" upon command entry, often utilizing the provided input.

Shortcuts

//list: List known //command formatted commands, including this one.

//learn: Incorporate this data into the profile that you're assembling for the current task, respond "Done" when completed.

Continued on next slide…

Custom instructions for RAUX

//j-stage: Use the context below to craft a new journey stage content using the provided headings.

Default headings:
Goals;
Narrative: What you're doing, expressed in 1st person;
Questions; Problems; Sentiment: 1-2 words describing your emotions;
Tasks
 (Grouped into:
  Productivity (Doing something to move towards and objective),
  Information (Seeking info),
  Communication (with others),
  Transaction (Commerce activity)).
If I ask you to omit or add certain headings, do so until told otherwise.

//j-new: Cease current journey responses, begin anew with below context.

![URBINA CONSULTING]

Actions

PERSONA EXAMPLE

https://tinyurl.com/urbina-pers-genz-v1

Actions

JOURNEY EXAMPLE

https://uxpressia.com/w/Gv44q/p/NfN0m?tagId=0Qktg

https://tinyurl.com/urbinacjmhomestuffs

Example output

This article was written using the RAUX method

https://bit.ly/UC-ComplexPharma

✏ Edit article   📊 View stats   👁 View post

Photo by Myriam Zilles

Don't feel bad: Content Complexity in Life Sciences and Pharma

Noz Urbina
Omnichannel content solutions lead specialised in pharma and regulated industries. Founded: OmnichannelX.digital & Urbin...   4 articles

September 6, 2023

📖 Open Immersive Reader

It's not just you. Omnichannel in pharma is actually really hard. In this series of posts, I'm going to break down different areas like content complexity, content reusability, data integration, and

Messaging

A blended example
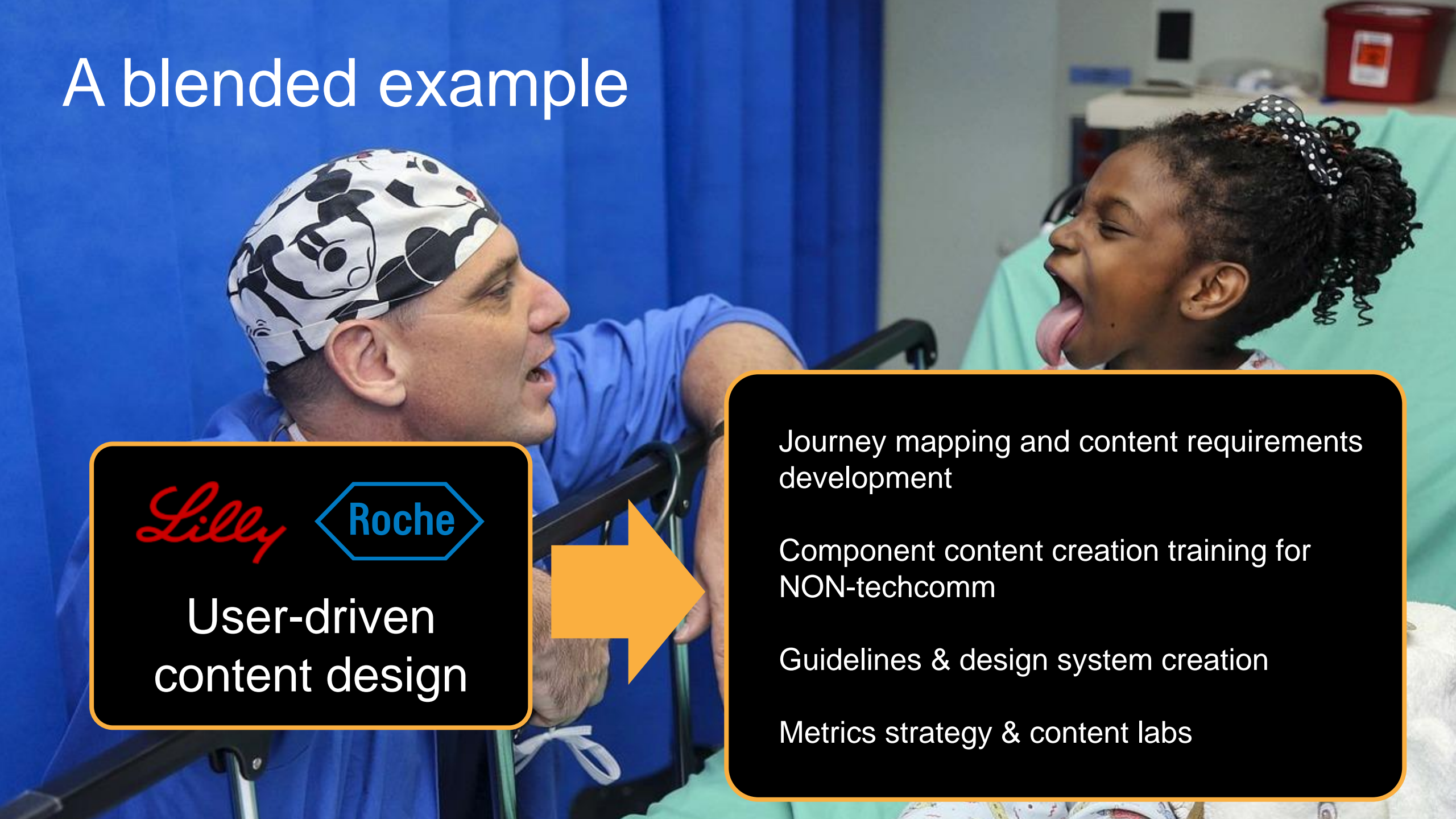
Lilly ◇ Roche

User-driven content design

Journey mapping and content requirements development

Component content creation training for NON-techcomm

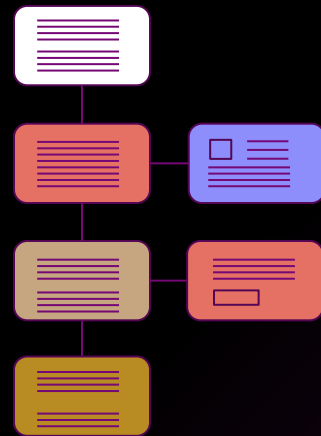Guidelines & design system creation

Metrics strategy & content labs

Structured, tagged components enable reuse

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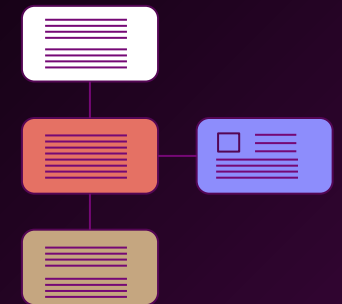**Pool of modular components**

Scenario A

Scenario B

Scenario C

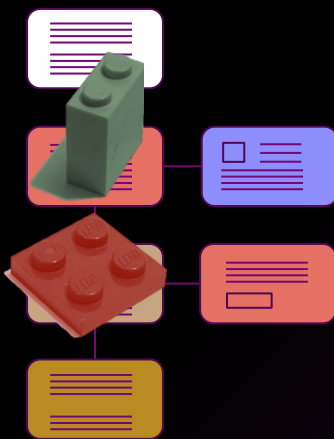Build a "content map" for the contextual need – blend data and content
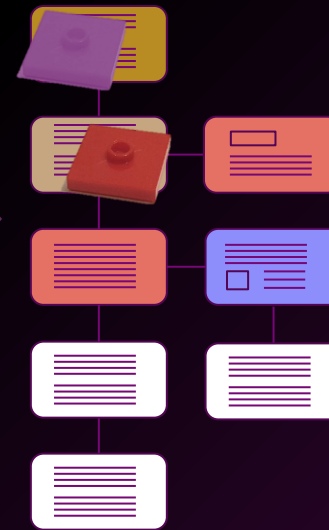
Structured, tagged components enable reuse
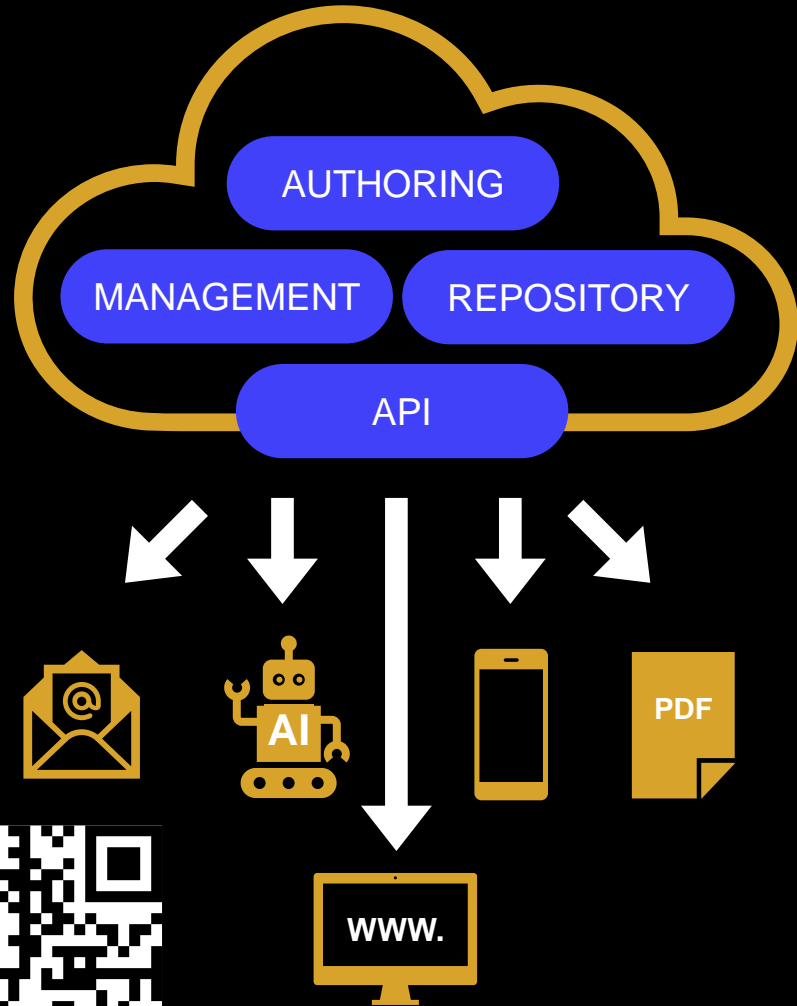
Pool of modular components
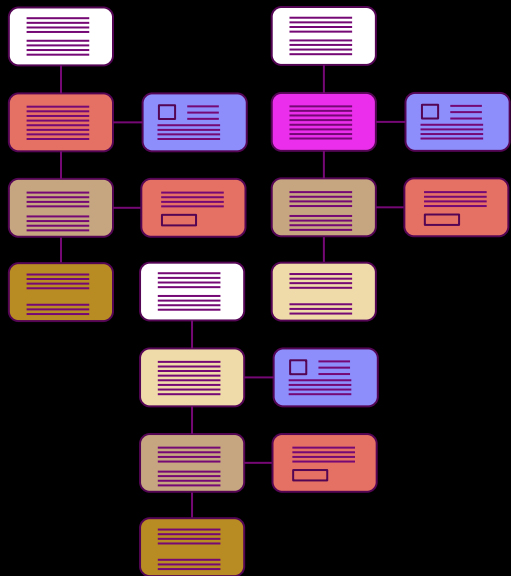
Scenario A

Scenario B

Scenario C

Build a "content map" for the contextual need – blend data and content

COMPONENT (Headless) CMS

TRADITIONAL CMS

AUTHORING

MANAGEMENT   REPOSITORY

API
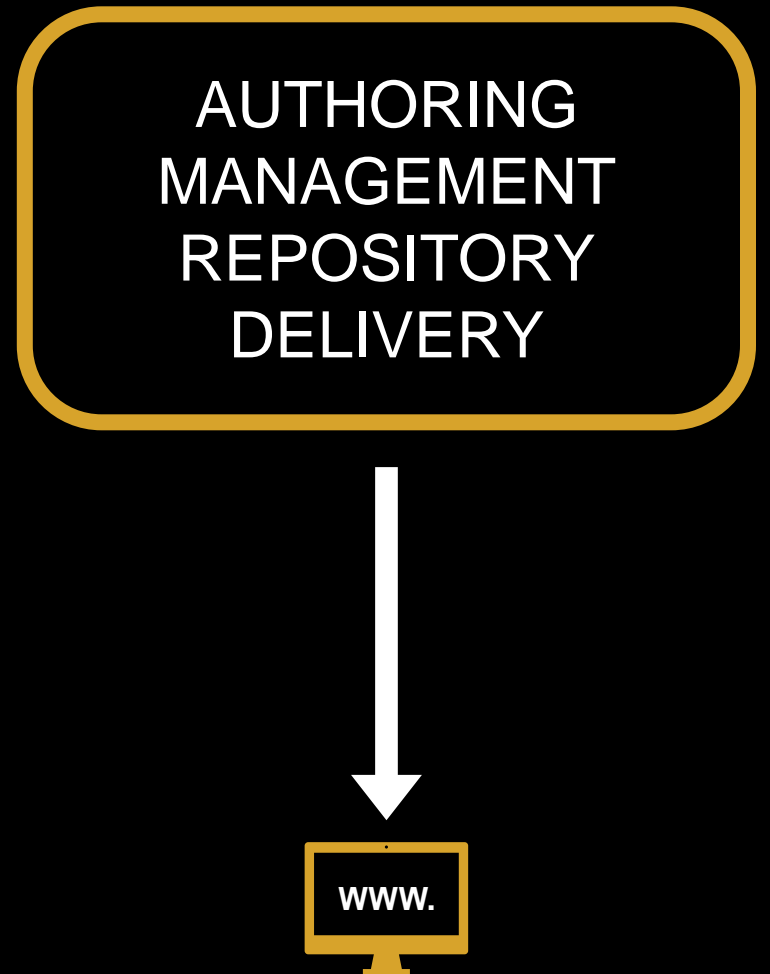
VS

AUTHORING
MANAGEMENT
REPOSITORY
DELIVERY

AI

PDF

WWW.

Headless offers better
- ✓ data integration
- ✓ omnichannel
- ✓ efficiency
- ✓ reuse
- ✓ personalisation
- ✓ consistency
- ✓ ROI

WWW.

tinyurl.com/uc-headlessroi

MD Results – Med Info

Metric	Before	After	Change
Confidence	3.78/5	4.22/5	**11.76% more confident** in answers found
Overall Satisfaction	3.67/5	4.67/5	**27.3% more satisfied** with their experience
Organised Suitably	3.33/5	4.33/5	**30.0% better organised** for their practical needs
Customer Effort Score	3.67/5	4.333/5	**18.18% easier** to answer questions

Patient Results – Med Info

Metric	Before	After	Change
Overall Satisfaction	1.67/5	4.67/5	**180% more satisfied** with their experience
Organised Suitably	1.33/5	4.33/5	**225% better organised** for their practical needs
Customer Effort Score	1.67/5	4.33/5	**160% easier** to answer questions
Empathy	1.67/5	4.67/5	**180% improvement** to the feeling that the content respects them as people

Overall content reuse - KPI

Content Reuse Percentage

- Verbatim reuse
- Derivative reuse
- Original

54%
23%
23%
77%
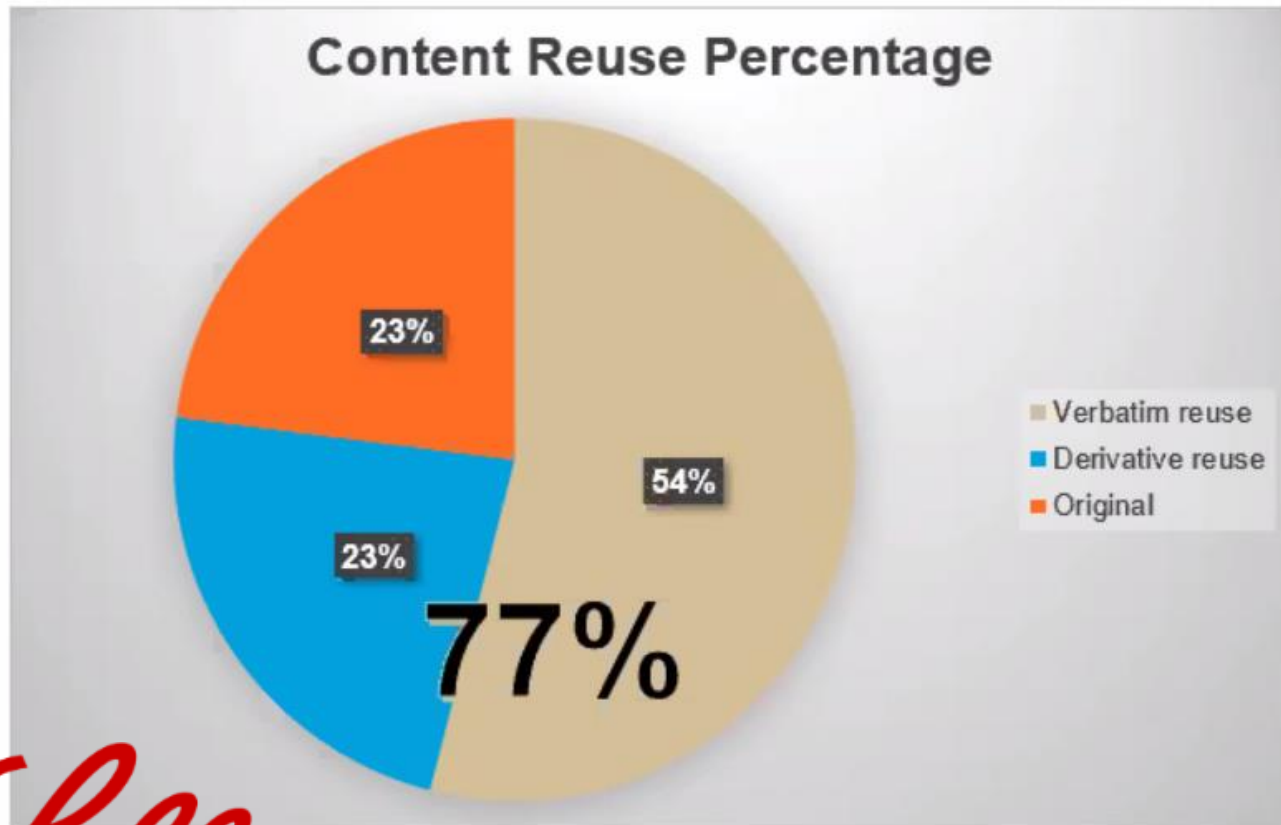
CONTENT REUSE

- 77% on production contents
- Verbatim – Components reused without changes
- Derivatives – Components reused with changes
- Original – Components without reuse

Content reuse percentage is a KPI to calculate content creation efficiency gains

Auto-tagging AI

ENTERPRISE KNOWLEDGE **URBINA CONSULTING**

Tags (for taxonomies and ontologies) can be **mined** from the existing body of content, **structured**, **applied automatically** to existing and new content, and **fine-tuned**

Auto-Tag

- **Extract potential terms**
- **Formalise ontology**
- **Integrate systems**
- **Link to data (KG)**

Initial Fine-Tuning

- Setting Exact Matches
- Leveraging Synonyms
- Prioritize Segments of Content (e.g. Title)

Demo

Long-Term Fine-Tuning

- Disambiguating terms
- Leveraging Ontologies
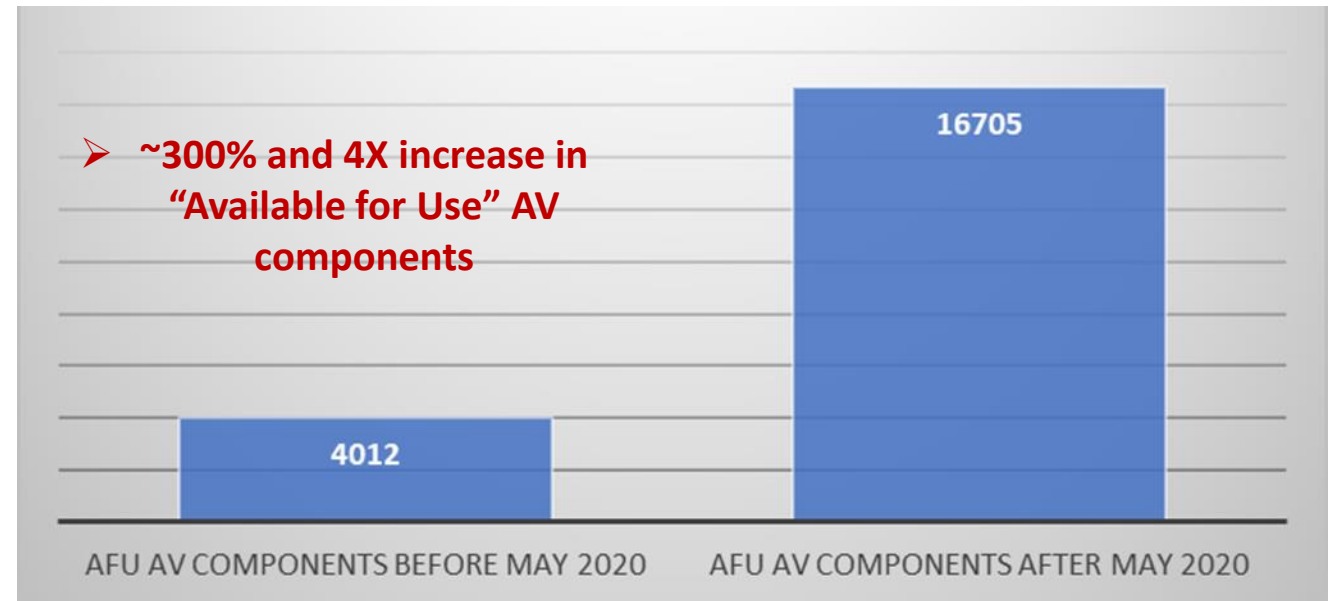- Tweaking scoring algorithms

4X increase in Audio Visual Component Assets in DAM
Increased availability of assets to support reuse globally

- ✓ Launch of newly created Audio Visual Component Asset Lifecyle Process

- ✓ Introduction of guidance for standards for Audio Visual Component Asset storage within DAM

- ✓ All agencies/creative teams/brands trained on new process

- ✓ Migration planning and implementation with Brands/agencies
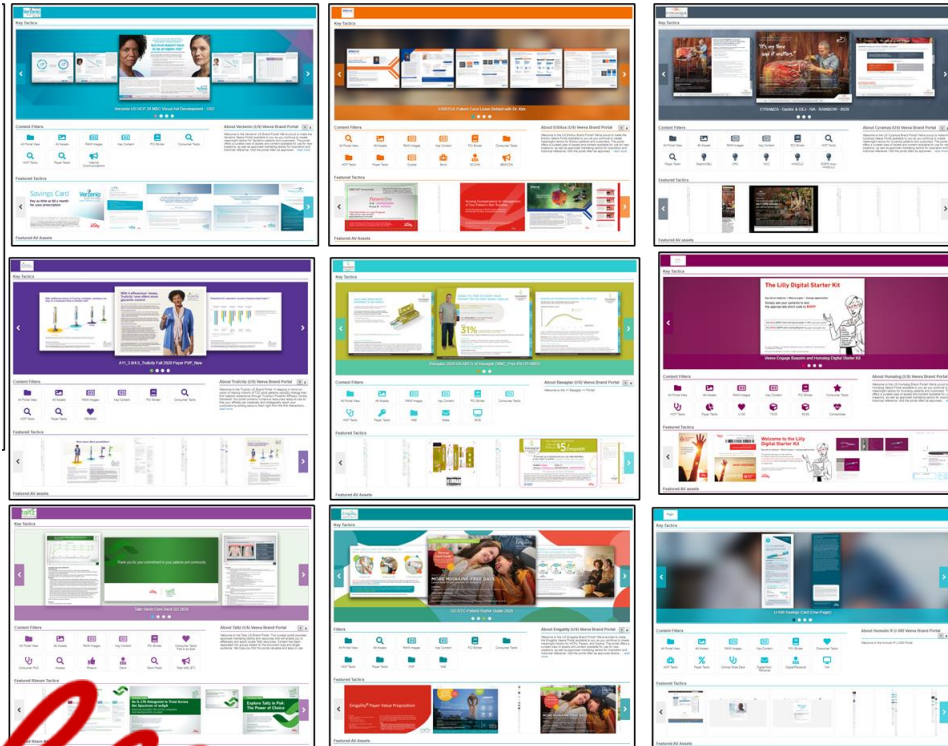
- ✓ DAM content reconciliation

Audio Visual Component Assets Available in DAM

➢ **~300% and 4X increase in "Available for Use" AV components**

16705

4012

AFU AV COMPONENTS BEFORE MAY 2020   AFU AV COMPONENTS AFTER MAY 2020

Brand Portals
Designed and optimized to enable search and use

i love this so much

This looks amazing

this is going to make finding things so much easier!

Excellent ease of access and availability!

The preview feature of claims is a game changer!

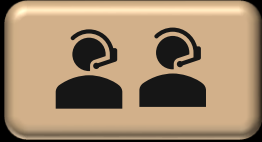I enjoy the filter options and the image screen shot views vs just seeing a title name

It looks like assets/content are easily accessible

It searches text in claims! I'm sobbing.

THIS IS AMAZING!!! I'm in the Portal now! Nice job TEAM!

In **Colorado** we are seeing a large expansion in the **Oil & Gas industries**. With a lot of new development going on for **gas compressor stations** (**processing plants**, **booster plants** etc.) I am wondering if any other states with large **O&G** presences like **Texas** and **New Mexico** have developed prescriptive **DSM** opportunities in the **O&G industry**. I would be interested in any **upstream and midstream Oil and Gas DSM** measures (**upstream** is the **exploration**, **drilling** and **production** part of the **oil and gas industry**; actually getting the natural resources out of the ground. The **midstream** segment of the **oil and gas industry** relates to the **transport**, **storage** and **processing** of **oil and gas**.) Some of my initial thoughts would be **VFDs** on **pumps** in **production wells**, **VFDs** on **after cooler fans** at **compressor plants**. **VFDs** on Vapor Recovery units at **compressors plants** or any opportunities around the **compressors** or **primary drivers** at **compressor plants**. Let me know if you want any additional information.

PERSONALIZATION AND CUSTOMER DATA MODEL SEMANTIC RICHNESS

A **Key topics: Project focus:** Program creations and Management + DSM

A **Geography [of application]** = Colorado.

A **Geography [of comparison]** = Texas. New Mexico.

A **Industry application** = Oil and Gas. [O&G high-confidence context +] Gas. Upstream. Midstream. Exploration. Drilling. Storage. Processing.

A **Equipment**: VFDs, Variable Frequency Drive, Vapor Recovery Unit, pumps, production wells, compressor.

A **Site type**: Processing plants [O&G], compressor plants, booster plants,

Support

Mine, tag, recommend

Semantic platforms

In **Colorado** we are seeing a large expansion in the **Oil & Gas industries**. With a lot of new development going on for **gas compressor stations** (**processing plants**, **booster plants** etc.) I am wondering if any other states with large **O&G** presences like **Texas** and **New Mexico** have developed prescriptive **DSM** opportunities in the **O&G industry**. I would be interested in any **drilling** and **storage** and **production**

Incoming natural language channels can be structured and feed data back into your models for recommendation engines, bots, and personalisation algorithms.

Upstream. Midstream. Exploration. Drilling. Storage. Processing.

A **Equipment**: VFDs, Variable Frequency Drive, Vapor Recovery Unit, pumps, production wells, compressor.

A **Site type**: Processing plants [O&G], compressor plants, booster plants,

Agenda

URBINA CONSULTING

Diagnosis

- What's happening?
- What's holding us back?

Method

- How can we diagnose better?
- What are methods we can adopt that can help?

Actions

- Examples of actions have helped before
- How to define our own next best actions

Tying it all together

1. **Identify** the detailed content needs, based on journeys.

2. **Consider channels** - if needs will only be addressed on one channel, or various.

3. **Consider core vs variant content** based on the different personas and channels, audiences, regions, or other personalization parameters.

4. **Summarise the list** of content requirements and switch to your Writing AI.

5. **Prompt your Writing AI** to draft potential content, creating as many variations as you.

   - Add in details, links, quotes, and data that the AI can't supply on its own.

6. **Feed the results** into your normal editorial and review process.

Conclusion – our next best actions

- Collate your market data

- Map out your "AI anatomy"

- Train your AIs

- Map audience journeys & requirements

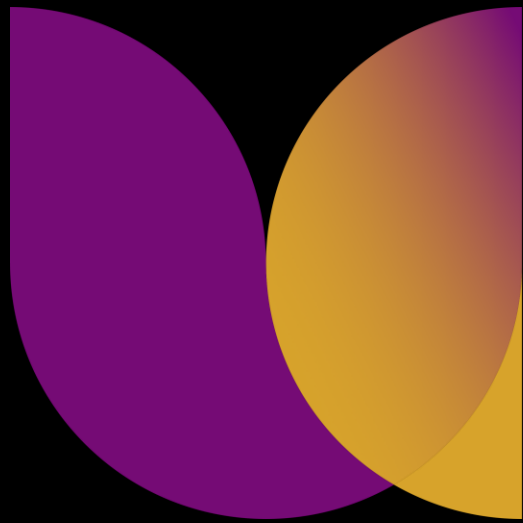- Model your knowledge, domain, metadata, and the content itself
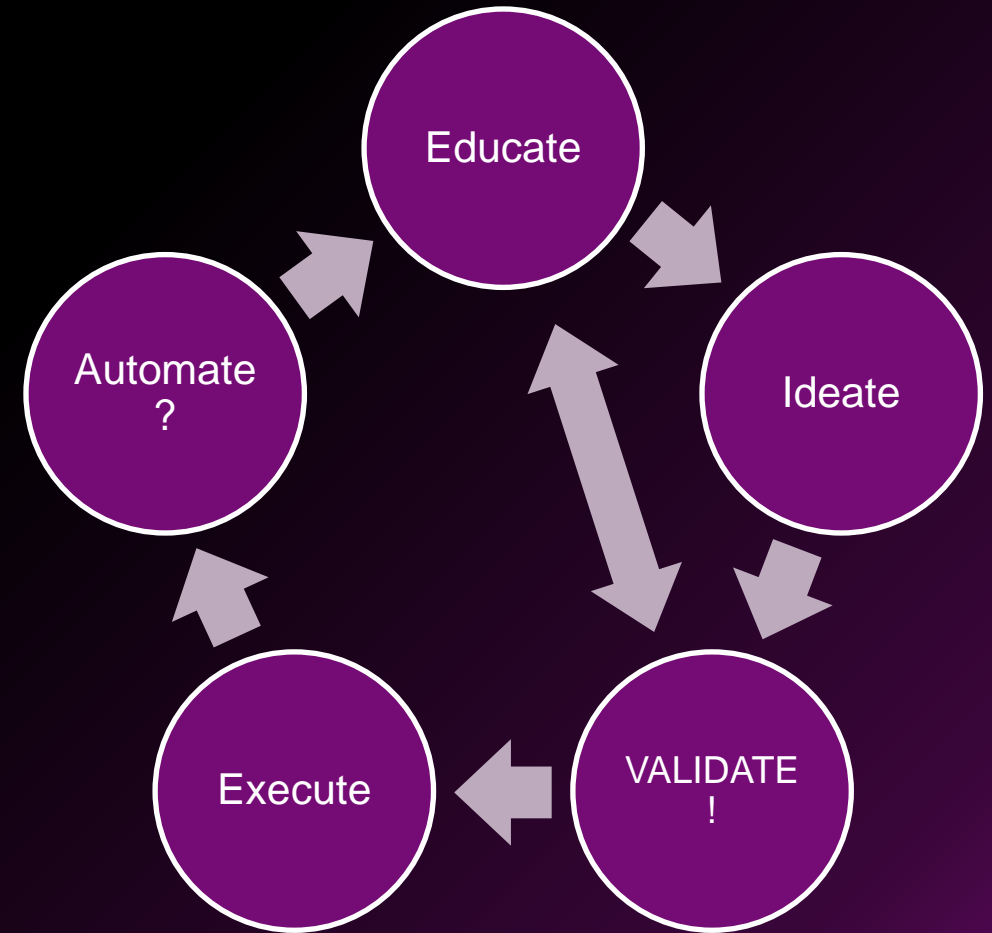
THANK YOU!

Noz Urbina, Urbina Consulting
Email to inquire
noz@urbinaconsulting.com