Rebuilding from the Inside Out

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The End of Growth?

- Advertising-led media return to profitability – in smaller companies
- Business media find that the niche has shrunk – and the supply chain is truncated
- Education finds that the state interest diminishes and private budgets cannot cope
- Professional information must earn its keep through demonstrated productivity
Re-igniting Growth

- The end of the B2B portfolio and the dominance of niche
- The emergence of fully integrated content/software information solutions companies
- Growth through M&A/industry restructuring
- The dominance of the workflow concept
From Research to Process: the evolution of information services

- Tailored Workflow (Single task)
- Extended Workflow (Many tasks)
- Third Party Content
- Community Contribution – user generated content
- Enhanced Search
- Vertical search
- Research Aggregation (indexing third party content)
- (licensing third party content)
The Components of Workflow Solutions

**PRODUCTIVITY**
- Did we save time?
- Or people?
- Or resources?

**DECISION-MAKING**
- Did we know what we should know?
- Needed to know?
- What we didn’t know was available to know?

**COMPLIANCE**
- Did we observe our own standards and practices?
- Our industry/self-regulatory rules?
- Legally enforceable standards and regulations?
- More cost-effectively than before?

Enhanced Competitive Positioning

Increasing Market pressures on cost, quality and pricing
Regenerating Growth

| Match content to users in new ways | Match metadata to workflow to create new values | Match workflow values to new users to create growth |
Thomson Reuters GRC – a Case Study in Growth Generation

- Strategy driven from the top
- Brings together data and client resources from two major divisions
- Acquisitions (Paisley, Complinet) fire the process
- Opens the door to new growth points from cross selling client services/front and back offices
Ownership and Control in the Information Cycle

Increasing competition to create “unique” solutions

Proprietary Services, enhancing indexed content through service presentation within user workflow

Indexation and Categorization: using proprietary tools (taxonomies etc) to assign values to content and create access paths which have meaning in marketplaces

Categorization layer: defining content to ‘obvious’ structures in common ownership (e.g. author, title etc)

Base level content in common ownership
The Metadata Value Cycle

- Intelligent Objects
- Ontologies
- Taxonomies and Proprietary Identifiers
- Lowest Common Denominator Identifiers and APIs
- Mark up/XML schema
- Content with structure exposed and searchable
- Unstructured content and disaggregated data

Increasing value
The Content Value Cycle

- Personalized content environment (e.g. Electronic Lab Manual etc)
- Value-added aggregation: content ordered and packaged for a particular process or workflow requirement
- Research aggregation: vertical market overview and search
- Product level aggregation (book, file, database, journal)
- Disaggregated content and data

Increasing value
Conclusions

- Information Services and Solutions companies will grow through the ability to sell more to existing clients.

- Education, in this sense, is an information solution.

- There will be fewer and bigger players, at the expense of the mid-size sector.

- Success depends entirely upon sufficient control of content, through structure and metadata, to be opportunistic.
Conclusions

- Success in absorbing third party and user-generated content is also vital
- Workflow solutions depend entirely upon appropriate behavioural analysis and a realization of user value
- Once in place, these solutions will have repeat subscription business and high margins
- But a tendency to duopoly will also be a result
Thanks for listening!

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