AIIM Podcast on StratML
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Owen Ambur's Talking Points
July 27, 2016

1. What do you feel are the most important standards for government agencies and other organizations whose plans and reports should be matters of public record? Why?

- The most important standards for all organizations, worldwide, are those addressing the substance and format of business-quality records -- what are commonly known as open data standards.
- However, what is commonly lacking is the recognition that both the structure as well as the semantics are important.
- Data without context is meaningless.
- Document (Record) = Data in context
- Business-quality records must provide sufficient context to meet the requirements for the purposes they are designed to serve.
- That's part of the reason the Semantic Web has not yet achieved its potential.
- Business records require structure as well as semantics -- structure that is comprehensible to human beings as well as readable by machines.
- Even the so-called "do-nothing" Congress has recognized the importance of machine-readable information.
- Not only have they mandated that Federal agencies publish their strategic and performance plans and reports in machine-readable format but they are also moving to publish their own documentation -- legislation -- in machine-readable format.
- So the time is ripe for AIIM to exert leadership in fostering the development and usage of open, machine-readable data standards for business records.

2. What is StratML and why is the standard so important?

- The vision of the StratML standard is: A worldwide web of intentions, stakeholders, and results.
- Intentions are what we plan to accomplish
- Stakeholders are who plans to do it and for the benefit of whom
- Results are how we know whether we have achieved our intentions or not
- So StratML is important to anyone who wants to accomplish anything or cares whether anyone else does ... such as government agencies who are spending our tax dollars, charities who seek our donations, and corporations who should be expected to conduct business in socially and environmentally responsible ways

- Conceptually speaking, StratML is an international standard for the content commonly contained in the strategic plans of all organizations worldwide

- StratML Part 1, the core elements, has been published as ISO 17469-1

- Part 2, specifying the additional elements required for performance plans and reports has been approved and published as ANSI/AIIM 22:2011

- More technically speaking, StratML is an XML vocabulary and schema for the content of such plans and reports
- The vocabulary is the set of terms and definitions for the elements
- The schema specifies the relationships among those elements
- For example, one or more near-term objectives may be documented under each longer-term goal
- And one or more performance indicators may be specified for each objective

3. StratML is intended to enable the concept of "strategic alignment" within an organization, by facilitating stakeholder feedback on strategic goals and objectives and even including the discovery of potential performance partners. That seems like quite a conceptual scope…how does that work?

- Helping to answer this question in ways that are meaningful to users is why the engagement of AIIM's vendor members is so important

- "Strategic alignment" means that all of the organization's resources are effectively directed toward the realization of its business objectives
- In the context of information management systems, that means each of the organization's records is linked to the objectives it supports
- AIIM's content, document, and records management vendors can make it relatively easy for users to do that

- Because each element contained in a StratML document is discretely tagged, value-added intermediary services can make it easy for users, first, to discover elements of direct interest to them and, second, provide input and feedback as they see fit.

- Because the data is machine-readable, query services can make it more precisely discoverable than the full-text indexes that currently exist

- Once relevant data is discovered, it can be presented directly to users without requiring them to scroll through volumes of text and images

- Machine intelligence can also be applied to facilitate discovery of relationships that have not yet been made explicit

- For example, individuals and organizations can be alerted to others who are pursuing common or complementary objectives and, thus, may be potential performance partners

- Once such relationships have been discovered, they can be made explicit simply by using the <Relationship> elements of StratML Part 2 to cross-reference the related objectives in each of the partners' own performance plans

- Again, AIIM's vendor members can make it relatively easy for users to do that

- To the degree that plans may be public and published on the Web, the effect will be to build the "worldwide web of intentions, stakeholders, and results" -- thus realizing the vision of the StratML standard

- As the network effects begin to build, value-added intermediaries will offer products and service creating a virtuous cycle leading to ever-increasing improvement in performance

- In short, users will be empowered to achieve their objectives far more easily and effectively than ever before possible

- Once that occurs, no one will be satisfied with good, old-fashioned business as usual

4. For our listeners and AIIM members, in your view, what is the biggest value and importance of standards in the "ECM industry?"

- Standards are important because they help us achieve our objectives more efficiently and effectively without being forced to waste time and resources reinventing the wheel for purposes that are common across organizations and information systems.
- Standardization is a matter of business process maturity, in the sense of the Capability Maturity Model
- Even at the lowest level of the model, good things sometimes happen by chance or by heroic effort
- However, if we want good things to happen routinely in the regular course of business processes, those processes must incorporate the applicable standards

5. In your view, how as AIIM helped support the design and adoption of standards?

- Maintaining ANSI accreditation
- Leadership in ISO
- As noted on AIIM's website, AIIM is the official Standards Development Organization (SDO) for Content and Information Management standards authorized by ANSI. The AIIM Standards Program supports and represents U.S. interests at the ISO level.

- Betsy Fanning, AIIM's director of standards, provides expert advice and counsel on the development of information management standards.

- AIIM's members can help by promoting the importance of standards
- AIIM's vendor members have a particularly important role to play by implementing open data standards in tools, apps, and services that are compelling to use -- because they help users accomplish their own objectives more efficiently and effectively

6. What is the most important thing that you have learned from your involvement with AIIM?

- Patience -- The standards development process can take a long time ... And just because a de jure standard has been duly adopted does not necessarily mean it will quickly become a widely adopted and used de facto standard
- Persistence -- Anything worth having is worth not merely waiting for but actively pursuing in small steps every day, including through podcasts like this
- Gratitude -- To AIIM for sponsoring the standard ... to all of the volunteers who have worked on it thus far ... and to you, Kevin, for hosting this podcast