How to Engage Global Customers in the Localization Process

Process Analysis, Case Discussion and Field Report
Engaging Customers: Overview

- Introduction
- Process aims and process chain in general
- Process and customer interaction
- Focus: customer interaction in QA
  - Case studies
  - Field report
- Conclusion
Engaging Customers: Introduction

STAR Group

+ 30 years multilingual information management

30 offices in +50 countries with +950 specialists

www.star-group.net

- Translation
- Terminology management
- Authoring/support
- Electronic publishing
- Software development
- Software localization
- Machine translation
- Workflow/process management
- Terminology management

Engineering of multimedia systems

Authoring/localization

Translation

Terminology management

Electronic publishing

Workflow/process management

Machine translation

Software development

Software localization

Translation

Terminology management

Electronic publishing

Software development

Workflow/process management

Terminology management

Engineering of multimedia systems
Engaging Customers: Introduction

▲ Presenter: Birgit M. Hoppe
  + 20 years in the localization industry, vendor and customer side.

▲ Process, tools & interaction
  Successful localization processes require more than just sophisticated tool support, they need efficient participant interactions with everyone involved.
Engaging Customers: Process

▲ Process = ?

Process = sequence of connected steps… defined as work of a person/group … of one/more simple/complex mechanisms/systems

Localization process standardization

Need for flexibility and adaptability

Process management: standardization -> tracking -> control & monitoring -> automation
Engaging Customers: Process Chain

- Localization-project start
- Pre-processing
- Selection of Translator for translation/QA
- Localization/translation by Translator
- QA by Translator
- Post-processing
- Delivery/Post-project-administration
- ...Project-independent administration
Engaging Customers: Process Chain

▲ Process steps ... interaction

- Pre-processing
- Selection Tr
- Project-related administration
- Post-Processing
- Post-project-administration

Data Input/Questions
- Calculation, prices, offer / order
- Preferences
- Questions / answers
- Questions / answers

Localization-project start

Project-independent administration

Data delivery

Customer

QA?
Engaging Customers in QA

Who is the customer involved in a review?

- Market
- Subject-matter
- Market language
- ...

- In-country organization
- Main time: Training, support, sales...
- Know-how
- Probably no know-how

- Translation / localization process /tools, translation-memory working-principle...
Engaging Customers in QA

▲ When & how does a customer review?
▲ ...and how is feedback transferred?

a. In the published localized product -> ?

b. In the localized product before publishing
   -> not integrated: PDF

c. Integrated in localization process:
   -> publishing format

d. Integrated in localization process:
   -> viewer on localization format
Engaging Customers in QA
Engaging Customers in QA: Case studies

Case A: global company without „process“

- „manual“ feedback via different channels
- Quality initiative ... of a country organization without previous coordinated planning
- Examples, problems, results
Engaging Customers in QA

Case A: Global company without „process“

Phase 1
- No QA integration of the markets
- Feedback from end customer -> technical support (using documentation), -> warranty claims
  ➢ Too late!

Phase 2 Quality initiative of the market
- Reviews independent from source
- independent TSP without process knowledge
- Results in Excel without context, identifiers
  ➢ Huge effort, results not usable!

Context, context!

„technically incorrect“
„does not make sense“

Problems in source text
-> Dialog authors, customer, translation
Engaging Customers in QA

Case B: Customer manual approval via PDF - 1

- In-country reviewing = sending a PDF and hoping for the best! ;-) 
- File handling efforts: sending PDFs, instructions, timings 
- Lack of project overview: has the reviewer started to work? 
- Different levels of Know-how among reviewers regarding Acrobat functionality 
- Timing problems of the reviewers 
- High coordination efforts due to many process partners (customer, project manager, translator, reviewer)
Engaging Customers in QA

▲ Case B: Customer manual approval via PDF - 2

▲ Best-practice workflow for in-country reviewing

+ Define appropriate staff, ideally with command of the source language
+ Define role and responsibility of the reviewer
+ Provide timing and time!
+ Provide review guidelines
+ Enable contact between reviewer and translator
+ Try to achieve continuity in the process
Engaging Customers in QA

#### Case C: Streamlined process for layout review

- Web-based solution, no installation necessary
- File format: InDesign or PDF can be reviewed
- Review in full layout view
- Quick update of layout view after text changes
- Detailed tracking of all changes
- Automated process for inserting changes into the InDesign files
- All changes made on the same document
- Guided process, automated notification mails
Engaging Customers in QA

- Streamlined process for layout review
- Updating Translation Memory
Engaging Customers in QA

▲ Case D: Integrated interaction reviewers / translators

+ File formats: all Transit-supported formats, from Adobe FrameMaker to XML
+ Web-based solution, no installation necessary
+ Detailed tracking of all changes
+ Role-based rights model: commenting vs. editing of content
+ Preview features:
  + source text – target text
  + and, depending on file format, dynamic preview of target text
+ Direct processing of Transit language pairs, no migration of changes necessary
Engaging Customers in QA

Case D: Integrated interaction reviewers / translators
Engaging Customers: Field Report

▲ Field Report
by Damian Scattergood
of STAR Dublin

+ Point of view LSP:
  Real life customer interactions
  for QA and questions
  within localization process
Engaging Customers: Field Report

⚠️ Review problems!!!

- Translation, Publish/Layout (DTP), Review etc.
- Editing PDF’s, notes etc.
- Non-Approved terminology.
- Moving target away from source. No longer a translation.
- Is the source wrong or the translation?
- Who changed that sentence? Why?
Engaging Customers: Field Report

Case in point
- On the road, multiple source feedback.
- Spanish example

**Online, on-line, on the line?**
- Opinion or fact?
Engaging Customers: Field Report

▲ Our experiences: WebCheck in Customer review

+ Single Master Source / Location
+ Better Output
+ Higher quality consistent translation and output
+ Reduces desktop publishing effort
+ Better Turnaround
+ Collaborative workflow
+ Faster and easier.
Engaging Customers: Field Report

Translation / Proofreading

WebCheck

Star Internal Review

Final Layout Work (DTP)

Document Publication

(Client)
WebCheck review online
Changes / Edits / Comments

STAR Reviews customer changes
Updates TM

Our WebCheck Workflow
Engaging Customers: Field Report
Engaging Customers: Field Report

Webcheck is an efficient tool that will allow you to review your translations through a dedicated online review portal that helps streamline content review. This helps reduce the additional costs and time spent on review passes and allows a direct integration of the changes back into your translation memory.

**How does it work?**

STAR loads the translated files online and grants you access to them. After logging into the portal, your reviewer can see the translations side by side with the source content in one integrated window and work directly on the translated files to carry out the necessary edits. The user-friendly interface makes reviewing your translated documents in Webcheck very easy and fast. The synchronized bilingual display will ensure a better accuracy of the review.
Engaging Customers: Field Report

Webcheck

STAR online review portal

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The user-friendly interface makes reviewing your translated documents in Webcheck very easy and fast. The synchronised bilingual display will ensure a better accuracy of the review.

Additionally, Webcheck provides a direct interface into STAR’s working format, so once the changes are inserted by your reviewer and checked by our translation teams, the preferred translations are immediately saved and stored for reuse in your future translations.

This also entirely removes the need for a time-consuming manual implementation of changes from PDFs back into the translated files and therefore keeps additional time and costs to a minimum.

Webcheck will definitely simplify your review process:

- It avoids the exchange of files during the review stage, tracks the changes added automatically and centralises all the files needed for the review on a single platform.

- This guarantees a faster execution of the review component and of the projects overall.

Key benefits

1. Webcheck vs traditional review systems

Remote access

You can check your files at any times, from any machine.

You just need an Internet access and you can open Webcheck in your browser.

You don't need to download and store original and translated files locally so as to edit them.

This also alleviates the risks of working with outdated versions.

Storage

All your project files, no matter how numerous they are, will be stored and easily accessible in the Webcheck project.
Engaging Customers: Field Report

- WebCheck benefits everyone.
  + See the Source and Target – so they stay on message
  + Context – they can see what they are editing.
  + They do the edits – we only do the checking.
  + Done before DTP – so cost savings for everyone
Engaging Customers: Field Report

△ Customer Results

#1 Ignored terminology phrasing (TM)
  + Cost saving €1000 on single project.

#2 DTP Cycle. Multiple review cycles.
  + DTP cost reduced by 50%

#3 Website. Deadline. No time to load and proofread.
  + We did translation and proofreading in same time

#4 Website. Short turnaround
  + We did translation - they did review.
  + Better quality - faster time.
Engaging Customers: Conclusion

▲ Successful localization processes =
  + sophisticated tool support
  + efficient interaction with all participants.
  + Include customers QA and All's Well That Ends Well

...questions?

▲ Together we are stronger

... thank you for your attention!
Engaging Customers: Conclusion

▲ ... we are happy to continue the discussion at our booth 37

and

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