### Corporate Overview

Avalara has grown quickly from its beginnings in 2004, to today's leader in cloud-based tax compliance offerings.

One of the reasons for that growth is their corporate culture, with a clear vision from the executives for moving projects forward.

The company focuses on identifying applicable tax rates, filing tax returns, and managing compliance documents, among other services.

Their products include AvaTax, trustfile, and CertCapture, and their platform provides a database of tax-related content for over 190 countries, with over 1,200 connectors to leading ERP and other systems, and a rich developer toolkit for further integration.

*"When I joined Avalara just over 2 years ago, I was tasked with replacing an aging help system that the company had outgrown"* said Michael Iantosca, Sr. Director of Platform & Tools, *"and in December of 2022, that's what we did, but we delivered so much more."*

### COMPANY SNAPSHOT

- **Industry: Tax Compliance solutions (NYSE: AVLR)**
- **Founded: 2004**
- **HQ: Seattle, WA**
- **Employees: 4,000+**
- **Customers: 30,000+**

Avalara provide a leading suite of cloud-based solutions designed to improve accuracy and efficiency by automating tax compliance. Each year, they process billions of indirect tax transactions, file hundreds of thousands of tax compliance documents and tax returns, and manage millions of exemption certificates and other compliance related documents.

Michael started his career and interest in content management over 40 years ago, when he began as an Information Developer at IBM. After a series of successful projects, which included building the first multimedia labs and several generations of IBM's structured technical publication systems, Michael retired, or so he thought he would. Then Avalara offered him a position to build what he refers to as a the world's most efficient and advanced Content Supply Chain, an electronic publishing ecosystem that would eventually standardize the entire organization's technical content unification and delivery – in under 18 months.

What started out as a project involving a single department became a mission in content standardization with DITA at its core. *"We absolutely want reusable and componentized content to be managed in the DITA format, and with all the authoring tools being used across the organization, we needed a system that offered both scalability and flexibility. That's where IXIASOFT came in."*

**IXIASOFT**

## CREATING A DITA INFORMATION MODEL

Michael and his team started with a content migration plan, leveraging one of IXIASOFT's partners, Stilo, to both convert unstructured data and documents into the DITA XML format, which allows for IXIASOFT CCMS to store the content as structured components, and to analyze the content reuse potential this would provide. In the case of Avalara, they were able to achieve an incredible 80% reuse rate on existing content for hundreds of connectors that enable the integration of Avalara services with partner and customer systems.

*"Once the content for our project-targeted departments was imported"*, continued Michael, *"we were able to take advantage of all the benefits that the IXIASOFT CCMS has to offer."*

Which led us to the question of why Avalara chose IXIASOFT.

> **"We were able to take advantage of all the benefits that the IXIASOFT CCMS has to offer."**
>
> **Michael Iantosca, Sr. Director of Platform & Tools, Avalara**

## WHY IXIASOFT?

*"What we built can be referred to as an Intelligent Content Supply Chain"* responded Michael. *"Our overall goal is to unify internal and external-facing content using a single system. In order to achieve that, we needed to replace the existing online Help system, the client portal, and other disjointed content sources.*

*By building a standardized semantic architecture based on intelligent content, we were able to provide a single-sourced knowledge center for internal and external content, integration with our Salesforce support portals for agents and customers, and in-product contextual user assistance for our customers. We delivered that, on schedule, this past December, due in large part to selecting best-of-breed technology."*

*"So far, we deployed what I like to call our publishing trifecta: by organizing and storing the content in IXIASOFT, our Support agents have access to the information through their portal, and our customers get the same content through our online knowledge center, as well as in-product contextual user assistance."*

Avalara deployed the IXIASOFT CCMS as the foundational component for their information architecture. They chose IXIASOFT above other solutions for several reasons, including:

**1- Excellent Authoring Tool**

*"From a useability and simplicity perspective, we were enamored with the IXIASOFT authoring and workflow management interface. It is visual and well laid-out, virtually eliminating the painful XML debugging issues we had experienced with other tools in the past."*

**2- Workflow Management**

*"We appreciate the content workflows offered with IXIASOFT CCMS; not only are they highly configurable, they provide the necessary information to bring many automated processes and governance to fruition."*

**3- Collaborative Review**

*"Being a huge proponent of collaboration between writers, engineers, and other subject matter experts, the team makes good use of the collaborative review feature. It provides a well-designed view of annotations, and a details panel with information like last modified date and review status."*

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### 4- Extensible Solution

*"The fact that there are connectors for publishing and localization tools was a huge attraction for us. Building our own solution was going to be much too complex, so having these connectors supports our philosophy of a "build and extend" platform strategy."*

### 5- Comprehensive APIs

*"We leveraged the IXIASOFT CCMS APIs to build an automated pipeline for converting product application strings. The UI strings are provided in JSON format, automatically converted to DITA, and imported into the CCMS with no human intervention. Content professionals can then optimize user interface text and collaborate with application developers using IXIASOFT's collaborative review workflow.*

*Doing so also allows us to automate the localization of Avalara application UI strings using the very same workflow we use for localizing technical content – expanding the global footprint for Avalara products into new markets and growing revenue. The same pipeline automatically converts the localized DITA strings back to .JSON for re-consumption by product applications."*

*"...when designing a world-class content architecture and platform, it simply made sense to go with IXIASOFT."*

**Michael Iantosca, Sr. Director of Platform & Tools, Avalara**

The IXIASOFT CCMS APIs are also allowing Michael's team to build an enterprise command-and-control center called MyContentPortal for centrally managing and automating content planning and publishing, omnichannel content analytics, and localization planning and management.

Says Michael, *"We can easily script and automate global content changes, and we intend to integrate advanced semantic technologies such as PoolParty from Semantic Web Company with the IXIASOFT CCMS for taxonomy autoclassification, change management, and the fast-approaching era of knowledge graphs – which will open up whole new worlds of advanced content applications for Big Content, especially for those that follow the unique semantic and algorithmic capabilities of DITA and structured content that no other format can match."*

### 6- Strong Partner Ecosystem

*"We needed to consider the bigger picture, so when designing a world-class content architecture and platform, it simply made sense to go with IXIASOFT, especially since your partners represent some of the best in their respective industries, both from a business and an integration perspective. For example, we implemented Acrolinx to establish a terminology database and content governance, XTM for localization, as well as ZoomIn for dynamic publishing, all of whom are partners of IXIASOFT",* said Michael. *"We also use Videate for automated robotic video production at scale."*

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## THE RESULTS

| Benefits | |
| --- | --- |
| **Increased Productivity** | Avalara embarked on this journey in order to establish a unified content repository for better access to content across disparate systems, more efficient authoring tools, and a componentized content model that lends itself to reuse, faster publishing times, and extensive automation that leads to cost efficiency for the business, speed to market, and improved time-to-value for customers. |
| **Content Reuse & Efficiency** | After analyzing the entire database of content during the conversion process to DITA, the team discovered they were able to achieve an 80% reuse rate for large collections of content, such as the many Avalara connector and extractor user guides. |
| **Reduced Content Review Times** | The reduction in content creation and management overhead for authors is approximately 50% as a result of the intuitive user interface, collaborative review process, and automated workflows. |
| **Client Ease of Use and Self-Service** | Avalara provides improved customer service with their newly deployed contextual in-product help, including an increase in support case resolutions and support ticket deflection. |

## LESSONS LEARNED

*"When it comes to ensuring success on a large scale, strong project management and cross-functional collaboration is key"* said Michael, when asked if he had any wisdom to share after this first phase in Avalara's content architecture deployment. *"Hire the best writers, and don't try to build a content supply chain from scratch using tools and systems that were not designed to manage intelligent, componentized content.*

*Our approach with this project is similar to that of our customer-facing products – we are building the best solution for each identifiable audience within the organization, whether that audience is comprised of a group of subject matter experts or represents a department. Providing all the necessary tools, combined with just-in-time instructions, is key to getting engagement from end users."*

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