

Dynamic Delivery

What it is and why it matters



DYNAMIC DELIVERY

Why we need it

When you search for information, you are **seeking insight**. You gain insight when your information is contextual and complete.

Contextual because it adapts to you and to the device you're using. Because it focuses on precisely what you want, and understands what you need based on the task you are trying to achieve.

Complete because you can see through formats and across silos—content, structured or not, from any relevant source in an organization, delivered uniformly, consistently, and immediately.

You gain insight when you find precisely what you want, avoid the irrelevant, yet are offered intelligent suggestions of alternate pathways of learning.

This is the goal of *dynamic content delivery, or dynamic publishing*.

In the following pages we explore the principles and benefits of dynamic delivery. It will help you understand why you must seriously consider it, and how to choose a solution.

Content published as static documents is incompatible with processes and apps needed to enhance productivity.



Customer Support



Field Maintenance



Self-service Portal



360 Product Info

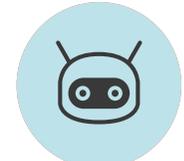
It is impossible to make it feed next gen interaction channels.



In-device, Inline Help



Heads-up Display, AR



Chatbot, Virtual Agent

DYNAMIC DELIVERY

What it is

Static publishing, what we're used to since the dawn of printing, is pre-generated, one-size-fits-all, always the same. You get one manual for a product, regardless of its customizations or the specifics of each installation; it's the same manual regardless of whether you read it on a phone, a laptop, or an HDTV. Newer and increasingly popular delivery vehicles, wearables such as AR goggles or heads-up displays are not designed to deliver static documentation at all.

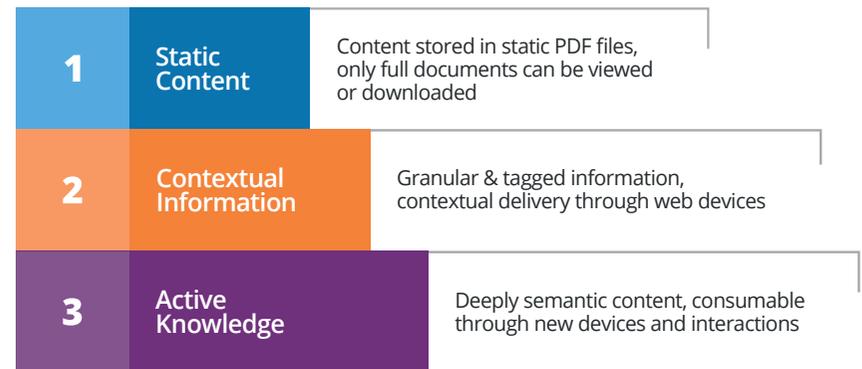
Static documentation needs to be gently laid to rest, with respect for heroic service, in that back room where you keep the fax machine.

Dynamic publishing delivers personalized, customized, on-the-fly documentation.

It gives results that are more **Findable**, more **Readable**, more **Shareable**, and more **Interactive**.

What permits this is the marriage of custom-engineered technology to documentation that is manipulated at a fine-grained level with consistent metadata. Together, these empower your system of apps and workflows to deliver great user experience and to **create product information tailored for the moment and adapted to the channel**.

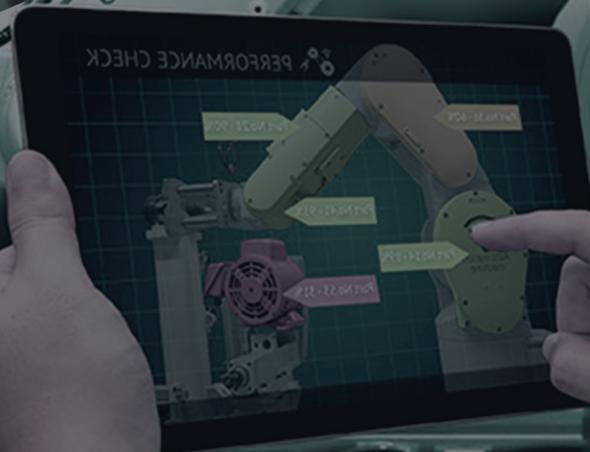
Content Maturity Level



Maturity supported by each delivery channel

Level	Printed	Portal	In-app/IoT	VR/AR	Chatbot
Static Content	✓	✓			
Contextual Information		✓	✓		
Active Knowledge		✓	✓	✓	✓

Findability



Readability

FINDABILITY

And content diversity

Observers report¹ that customers prefer to solve problems on their own. You can help them do this with a portal that combines an effective search engine with topic-oriented documentation.

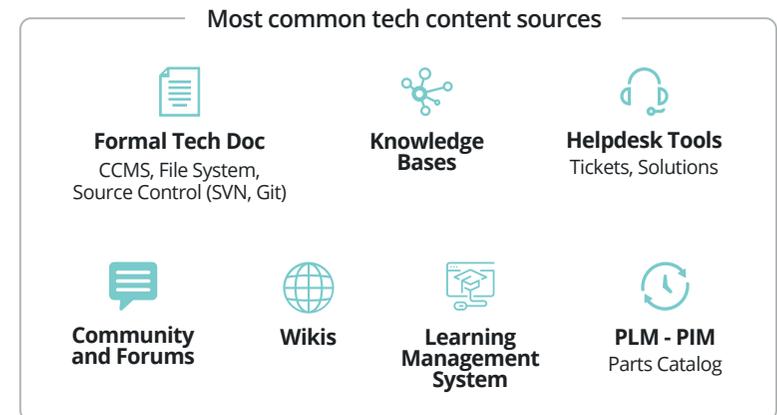
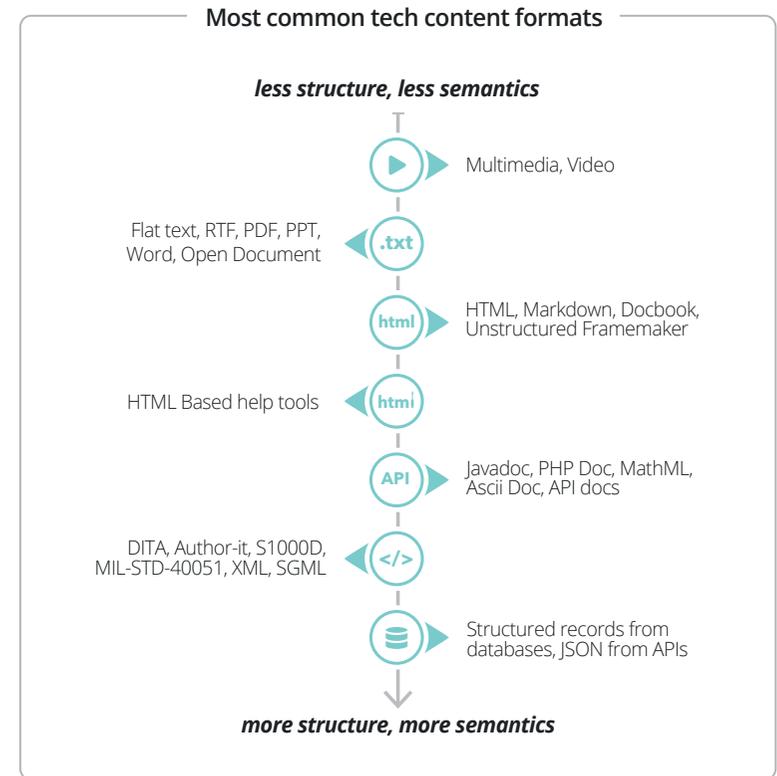
Over the last 30 years, enterprises have used typesetters, word processors, and technical writers with a medley of devices and software tools. The goal of all this activity is to package knowledge for their customers, technicians, and users... none of whom care whether the knowledge is packed in a Word document, a spare parts catalog, a knowledge base, a wiki, or a database of DITA topics.

These are factors your customers don't care about—how you format your documents, and where in your org chart they originate.

The insight the user seeks might originate in customer support, or it might come from marketing. In a regulated industry, a technician might need information initially intended for legal or government relations. Which silo the knowledge comes from is not pertinent, just speedy access, compliant with security constraints.

Hence, your search should be format agnostic. Your portal should process, transform, and enrich your content to make it consistently readable and organized, by accepting differently formatted and sourced documents with varying levels of metadata.

1. Forrester 2016



FINDABILITY

And large manuals

The experience of using your documentation portal has to be at the level your customers are used to—relevant as Google, engaging as Facebook, collaborative as Slack, and as fast as them all. Or they will quit you faster than a millennial leaving a chain restaurant.

Having your documentation structured and tagged (e.g., product, version number) at a fine-grained level gives your search more handles to find exactly what you want. When you can only search for entire books, the biggest books will always be the top search results. And you always get the same answer: Read the ...you know... manual. That's the very definition of poor customer support—no help at all.

When your content is chunked and finely tagged, that big book's boundaries dissolve and your search engine can dig inside and deliver dynamically exactly what your user needs, by working and indexing at the component level. Why should a human pore over an index when a great search engine is so much faster at it?

Dynamic delivery relies heavily on fine-grained content, whether it is created that way with a modern component-based approach, or started life as large manuals that now have to be automatically analyzed and chunked into small pieces.

From the lab

We have experimented the impact of PDF publishing on findability:

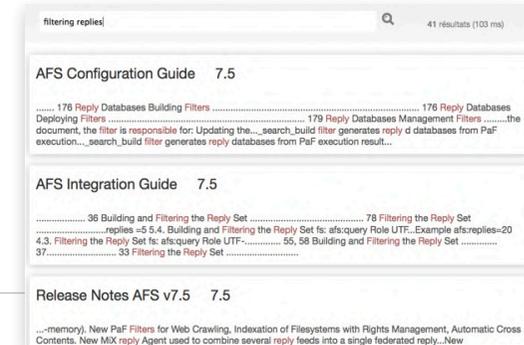
- Our own tech doc, generated as PDF (= 117 documents) and indexed with AFS, our proprietary state of the art semantic search technology.
- Let's run 2 different representative queries:

filtering replies

Filter: version 7.5

Results: 41 docs

(35% of the corpus)

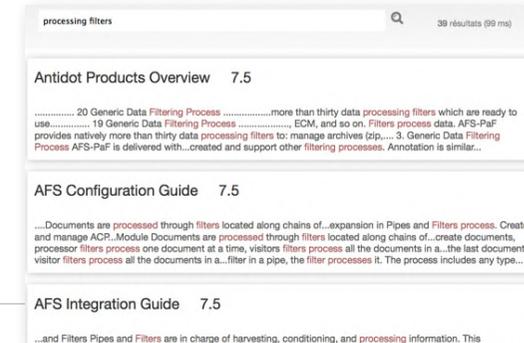


processing filters

Filter: version 7.5

Results: 39 docs

(33% of the corpus)



Findings: for both queries

- 1) same number of results,
- 2) same documents.

Reason: large books **tend to contain all keywords** and will always be part of the result list.

Analysis: the books are not the issue, but the fact that they are indexed as one single element.

Action: keep the book as a means to organize content, but change the indexing strategy.

FINDABILITY

And metadata

Metadata play a critical role in dynamic delivery. It is the mechanism that filters and targets content matching a situation. Whether pre-existing or added through AI, it is essential.

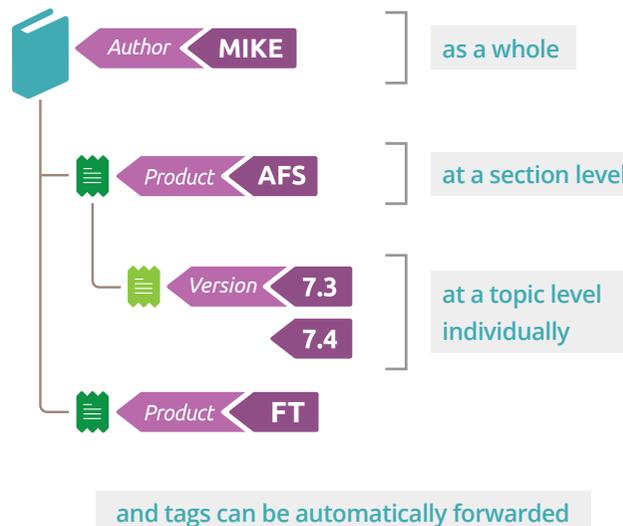
Metadata is information about your data, invisible tags describing your visible text. Any document can have metadata, and almost all do: creation date, author, number of pages... An unstructured document (such as Word) will have metadata at the document level. A structured document made of components (such as DITA) can have document-level metadata, but also at the topic level or below. It simply has many **more places for putting tags**, so it can be described in finer detail.

This ability grants structured documentation superpowers: it permits content reuse, lowers the cost of localization, and supports alternative options of information architecture... including dynamic delivery.

Documents (unstruct content) are tagged as a whole



Component based documents can be tagged



Metadata how-to

The mass of product information is growing explosively because of short renewal cycles, customizations, and a multilingual user base. The idea of applying metadata to every single topic in this gigantic corpus seems overwhelming.

Fortunately, **metadata can be inherited**, which makes the task manageable. Descriptive tags can be inserted at the document and chapter levels; these are inherited by the topics below. This way, you get the advantages of topic-level tagging without the intimidating prospect of applying metadata to every topic individually.

Topics can also be tagged automatically, using machine-learning based algorithms. The AI can generate a model from existing tagged content and apply it to other content, even from different silos.

FINDABILITY

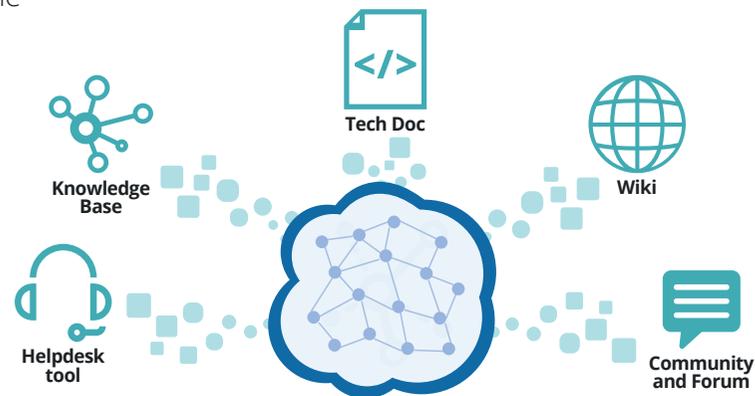
And content sources

Transparent silos

Your search engine should have X-ray vision, to see through silos. In fact, despite all the bad press silos get, **source diversity** is natural and unavoidable.

Silos have their uses, stemming from the different tools supporting the processes and operations in your company. Documentation can and should reflect the histories and traditions of different professions. Nobody expects engineers to talk like lawyers or sales people. But if the silos are transparent and permeable, the enterprise gets the maximum benefit from collaboration.

Dynamic delivery has the power to **bypass their rigid constraints** by reading and combining content from any source. It generates searchable metadata that indicate the origin of information, without limiting access to it. It should also align metadata, so that this will not only yield benefits for the end-user's search, it will benefit the entire enterprise that can now exploit synergies and promote collaboration across the org chart.



A World of search

Not all your users speak English. Structured documentation provides measurable advantages in translating and localizing documentation, enabling your enterprise to reach a global audience.

But it is not enough to translate your information. What if your delivery platform is not good enough to cope with these languages? Your search capabilities in French, German, Japanese, or Chinese should be as good as in English. Multilingual search should be a critical element of your delivery strategy. Your search engine needs to be tuned to use as many languages as your customers need.



FINDABILITY

And search technology

Findability depends on a custom-engineered and tuned search engine. We have all been spoiled by great web search—anything less than that is failure.

But what, exactly, makes a search engine great?

It is highly relevant by adapting the indexing strategy to the structure of each document.

It is personal because it learns from your behavior and adapts to your search patterns.

It has linguistic abilities—it knows grammar. It has semantic skills—it knows synonyms. It understands approximation—it is typo-tolerant.

It allows users to narrow down their search using filters, and even better, it applies some filters silently, taking context into account.

It is fast and does all this in milliseconds—after all, if your search is slow, users will be turned off and will end up grumbling on social networks or, frustrated, in your phone queue.

It is self-explanatory by generating abstracts of results that highlight the keywords of the search, or their synonyms.

..... Fine tuned search engine features

The image shows three sequential screenshots of a search engine interface, each with a callout box pointing to a specific feature:

- Auto-complete:** The first screenshot shows a search bar with the text "web ser". A dropdown menu lists suggestions: "Web Services", "AFS WEB SERVICES", "Antidot Back Office Web Services", and "Upload with Web Services". A callout box labeled "Auto-complete" points to the first suggestion.
- Auto-spell checking:** The second screenshot shows the search bar with "web servicies". Below the search bar, it says "Did you mean: [web services](#)". A callout box labeled "Auto-spell checking" points to the suggested correction.
- Facets:** The third screenshot shows a full search results page for "web services". On the left, there are faceted filters for "PRODUCT" (ABO, AFS, Fluid Topics) and "ANTIDOT VERSION" (7.8, 7.9). A callout box labeled "Facets" points to the "PRODUCT" filter. Another callout box labeled "Synonyms" points to the "AFS" option. A callout box labeled "Highlighted keywords" points to the word "Web Services" in the search result snippet.

READABILITY

And contextual information

Readability is the *ease of absorbing information*.

Less extraneous information along with good findability lead to greater readability. Find too much that isn't directly pertinent to the task, and readability plummets. After all, TL;DR¹...

With static documentation, you have to find the manual on the shelf, flip to the index, find your topic, locate the page, and check if it, in fact, answers your question... Then, because the manual refers to a range of products rather than your specific instance, you have to sift through alternate instructions to find your specific model. This is too much work—poor readability and a high risk of error.

Maybe it's an end-user frustrated with their new HDTV, but it could also be a field tech calibrating high-tech equipment—error is not just annoying and expensive, it's dangerous. The user is searching in order to accomplish a task.

With Dynamic Delivery, their search will lead to a virtual document, created on the fly, adapted to their individual characteristics, tailored to the task.

1. Too Long; Didn't Read

Dynamic book filtering

RampantCorp has a problem. Their popular servers are installed all over the country, and can be serviced either by users or field techs. But there are many different configurations, on top of which are a variety of replacement parts and cards, not to mention firmware updates—barely two installations are alike.

Documentation has become impossible: you either have dozens of different manuals, covering every permutation (and who knows if you missed one?), or one gigantic manual that is incredibly hard to use. Time is wasted and the risk of error is simply unacceptable.

What RampantCorp needs is a way to dynamically deliver a manual that relates exactly, down to the illustrations, to the server being repaired, with all its replacement cards and current software updates.

RampantCorp already uses DITA for authoring its documentation, and has tagged topics with information about hardware and software. Each server has a bar code and a unique identifier.

Now, thanks to dynamic publishing, all you need to do is point your tablet at the bar code, and an up-to-date RampantCorp manual for the exact device you're looking at is instantly delivered to your screen.

Static problem, dynamically solved.

READABILITY

And restricted access

At the very least, your search engine must enforce the company's **security policy**—is the user in upper management or R&D, permitted to see everything? Or are they technicians, or end-users? If their security level is lower, they should not even be aware of results they are not allowed to see.

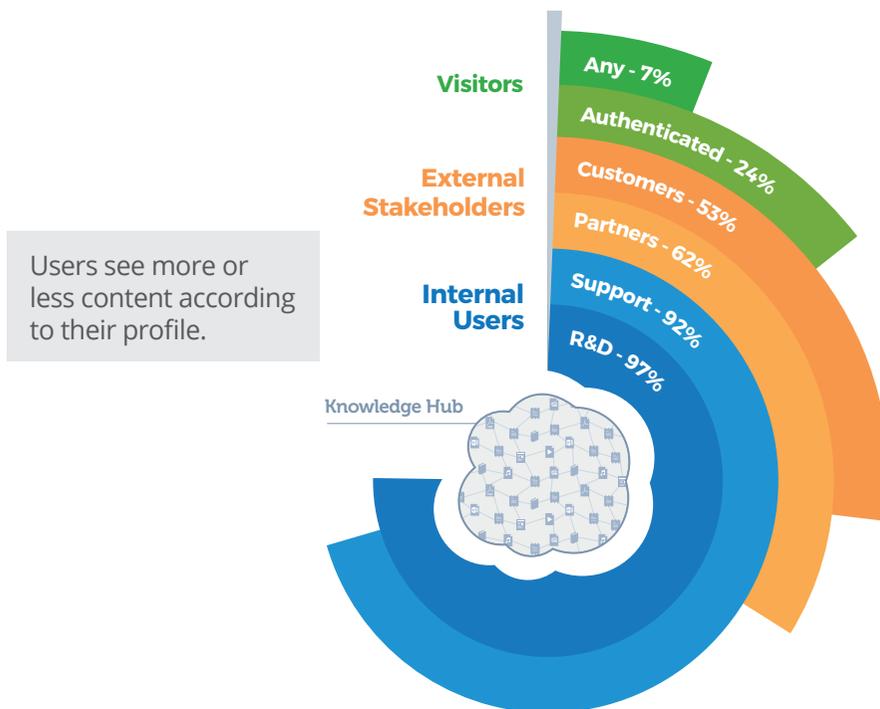
Even the type-ahead suggestions should apply security rules. After all, if you know Area 51 exists, it can't be all that secret...

Perhaps you have some results that anyone can get, but an enhanced set of results for customers with a certain **subscription**—this is their **entitlement**; think of different levels of customer care, or premium features.

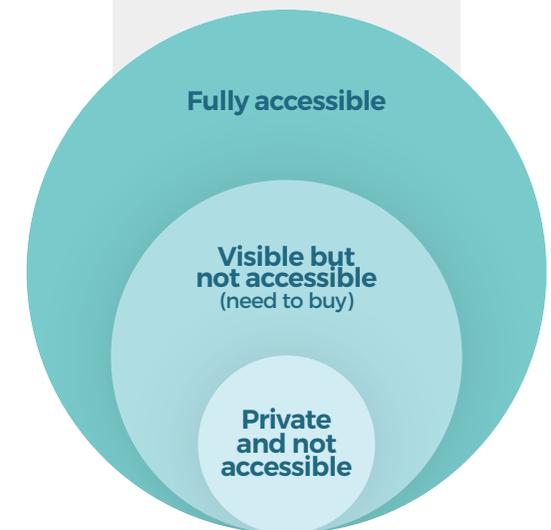
In this case, unlike with security, you want them to be aware that there are more available results, to encourage them to subscribe for more options or switch to a more featured product. You want to tempt them to buy more.

You may want to offer them a variety of **preferences**. Are they a beginner, advanced, or expert? Do they want a wizard to guide them? All of these could be accessible to every user, at their option, at no additional expense.

Along with strong security, tailored access is a benefit only dynamic delivery can provide.



For a user, content can be:



READABILITY

And delivery channels

Adapt To Devices

Since we all use different devices with different kinds of output, readability also means customizing the documentation to the readers' specific device.

Large screen? **Show me all the steps at once**, with detailed diagrams, so I can get an idea of the scope of the entire task.

Small screen? **Show me one step at a time**.

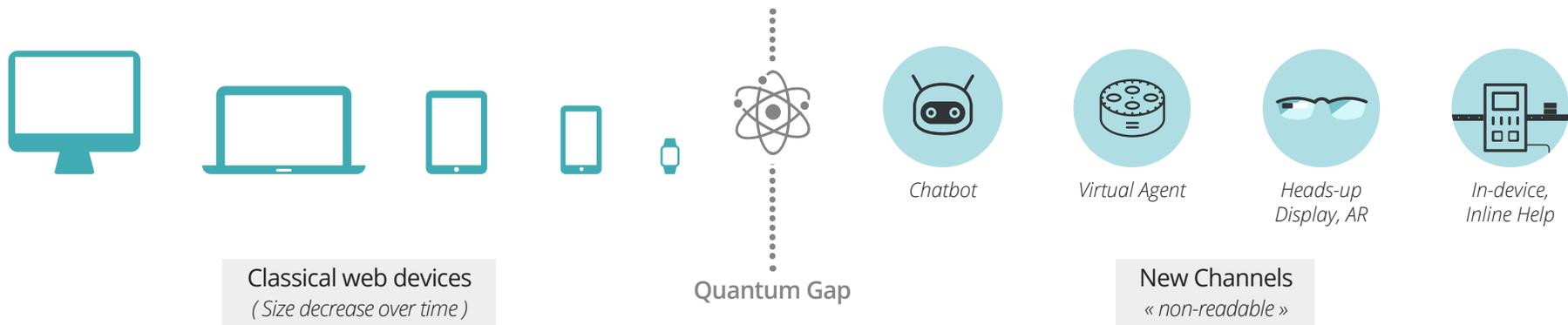
No screen? **Talk to me**. With cutting-edge devices such as AR glasses, VR goggles, or chatbots, dynamic delivery presents exciting possibilities. Static simply can't keep up. Try sending a fax to your smartwatch...

The modern enterprise copier/printer is a good example of specifically adapted documentation. When you need to change the toner or fix a paper jam, the printer's built-in display shows you a legible step-by-step diagram. This is a high level of readability—just what you need, no more, and well-adapted to the little screen.

Therefore, the information needs to be fluid and flexible, able to reshape itself to fit into any device. This is the exact opposite of static and pre-rendered documents.

Non-Human Readers

Finally, a fascinating user we are just getting to know: the non-human. What if the entity searching is another piece of software, such as a software agent? What if it is a printer or an MRI machine or a chatbot? The Internet of Things gives us a brand-new universe of non-human entities searching for information. They need results tailored to their ability to read and process. In fact, readability is a greater concern for them than for a human searcher, because they are not as smart, and need results tailored precisely to their design.



Shareability



Interactivity

SHAREABILITY

And structured documentation

When we think “share,” we think Facebook or Instagram. And why shouldn't sharing product information be as easy as sharing a picture of your Sunday brunch?

With Dynamic Delivery, virtual documents are generated on the fly, but this shouldn't prevent you from bookmarking and commenting on individual topics, as you used to do on real paper-based books.

Component-based documentation has been shown to provide its own return on investment at the authoring level with improved productivity, content reuse and optimized translation costs; this is a small part of the much greater ROI provided by dynamic publishing at the delivery level.

When your documentation is structured in small chunks, you are ready to deliver custom product information to your customer portal, your helpdesk system and mobile apps.

An advanced dynamic delivery solution will keep the structure of the documentation alive and offer the user the possibility to interact with the content at a fine-grained yet consistent level:

- Access to content is direct, at the component level, whether it is a task, a section or a chapter.
- Bookmarks can be set so as to jump, in one click, deep within the appropriate content.
- Alerts on content change are more targeted and users are not drowned by notifications each time a paragraph is changed in a manual.

- Users can build their own manuals by reusing existing content just as tech writers do, avoiding content duplication and the desynchronization that comes with copy-paste.
- Analytics of accessed and read content are more accurate since activity can be traced at a lower level, close to the real content consumption.

As dynamic delivery makes your current system more effective, it lays the groundwork for cutting-edge possibilities like augmented reality, chatbots, and smart software agents. Structured documentation lays a foundation for a future we can barely imagine, but for which we must be prepared.

SHAREABILITY

And Personal Books

A personal book is a tailored, commented collection of live links to dynamic information.

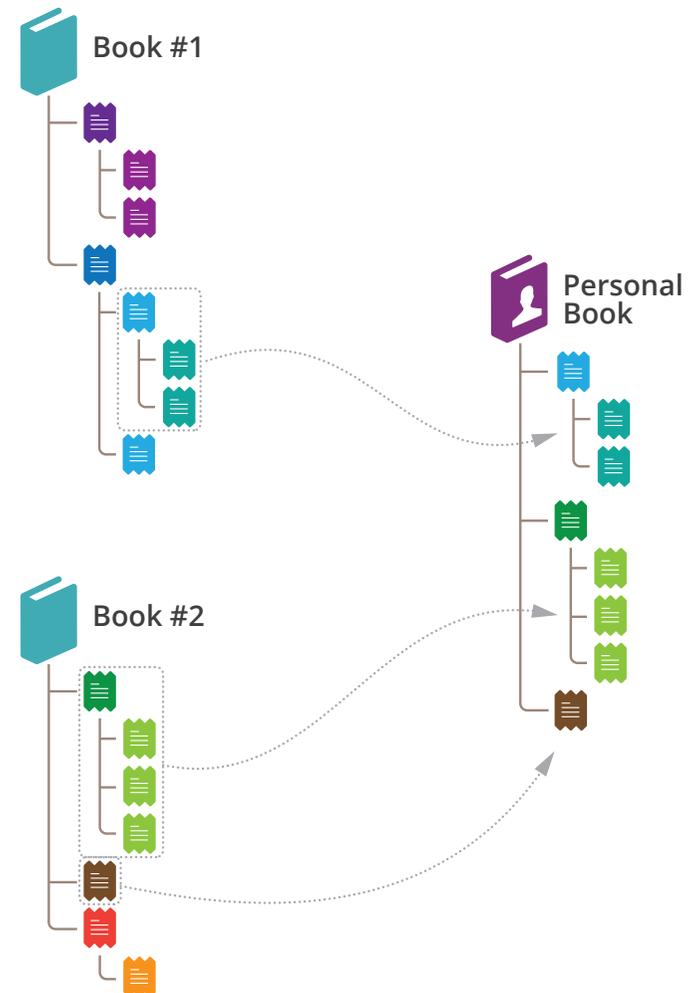
What if you could go further than just read pre-written stories (a.k.a. manuals) and create a customized, personal book by repurposing existing content in a few clicks? From a search result list, or when reading a book, select the topics or sections that best deal with your issue. Add comments, write yourself a few paragraphs if needed to bring some context and details. All this is done without copying and pasting, avoiding content duplication and desynchronization; instead, when the information is updated, the personal book is updated—always live, always current.

It should be easy for the user to share their personal book with their colleagues and partners. If you have field technicians, their supervisors can dynamically generate a task order, insert

comments about job specifics (such as which tools and spare parts to take, or safety cautions), and deliver it to their tech's mobile device. The field operator would be able to check off completed tasks and sign it when they're done. This personal book can be saved for legal, regulatory, or business reasons.

And why not print it out, three-hole punch it, bind it and give it to the tech as a physical book, good for one job? In some contexts, paper is the best solution. They can check tasks off and sign it with a pen at the end.

Low-tech is not to be sneered at, such as when power or connectivity is an issue. A paper book on a shelf is comforting, and regulators may even require it. There may be good reasons to freeze the smartly-tailored Personal Books, to render them static as a record, to be consulted later.



INTERACTIVITY

And content analytics

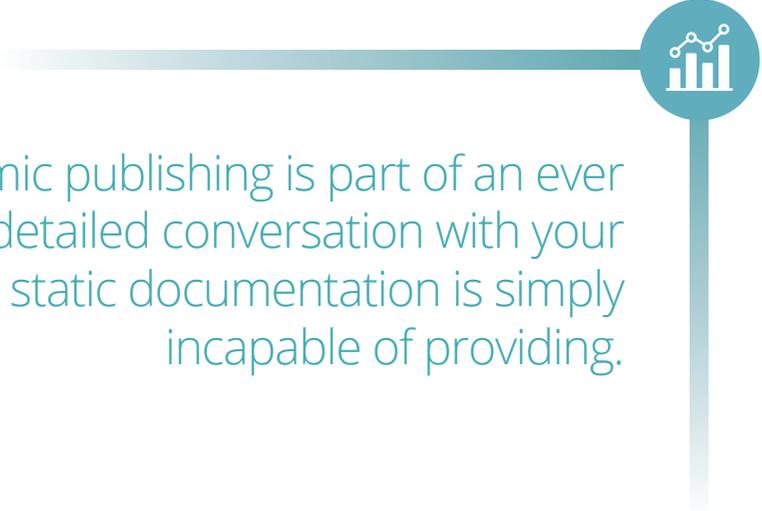
If you could interview your customers every time they had a problem, you could learn how your product fares in the real world. Short of that, if you could look over their shoulder at what they're reading, that would tell you a lot. But that's impossible... right?

With dynamic documentation delivery, you could potentially **follow along with your customer**. Since your documentation is parsed at a fine grain, you can discover **precisely what topics** their search has produced.

Since your search engine is optimized and tuned to your body of product information, you can receive detailed intelligence on what is on your user's screen, what has been previewed, what has been opened. You could **know what they are reading** and for how long.

Compare this with static documentation: you know that a book has been shipped or a PDF has been downloaded or an HTML page clicked through to, but you don't know if your document has been read, much less what section or topic.

If you knew which specific parts of the documentation were being searched for and displayed, and for how long, it would be almost **like interviewing your customer**. You could detect patterns in your users' searches and determine if your product has a problem or needs an update.



Dynamic publishing is part of an ever more detailed conversation with your user that static documentation is simply incapable of providing.

Strategic goals



Checkpoints

DYNAMIC DELIVERY

And your enterprise's strategic goals

A business relationship is a human relationship. This basic insight can be lost given the scale of the modern enterprise and the huge and varied population of its users, employees, and stakeholders. Good, honest communication at a global scale is simply impossible with the static tools we have used since the 1990s: the World Wide Web and PDFs.

The goals of dynamic publishing are simple—an **unparalleled intimacy** with your users and greater **customer success**. You can speak to your users via your panorama of documentation, regardless of source or format, and you can sense what your customers are looking for, reading, and viewing in unprecedented detail. The leap from static to dynamic delivery is as revolutionary as going from Morse code to the telephone—a **quantum leap** in bandwidth.

The dynamic publishing mechanism creates a virtuous cycle—you being able to speak to your users more fluently leads them to use your products more effectively and efficiently, which leads to **greater adoption**. In the other direction, a dynamic portal enables an unprecedented ability to listen to your stakeholders via detailed, intuitive analytics. That creates **greater understanding** and empathy, and that leads to the ability to give them more of what they demand.

We are experiencing a series of communication revolutions. Exciting new means of delivery – engaging all the senses with AR, VR, chatbots, wearables, as well as faster, smarter connected devices. Your customers are devoted to these and exploring new ones all the time.

Your static documentation is behind the curve. Your customers are not going to wait for you to tell them how to communicate—they already know how; and if you don't figure it out fast, they will look to someone who can. Dynamic publishing decouples the information from the delivery technology, **future-proofing** your communications.

Dynamic publishing adapts readily to new delivery mechanisms, whether it is screens, watches, or goggles, or something we can't yet imagine.

This communication channel enables you to guide your customers to success, and lets them show you, by what they read, where to **target your innovation**.

Dynamic delivery gives us the ability to listen to our customers as they mutter under their breath, watch them as they search for tools, and gain insight into what they want to do. Sure, call it data if you prefer, but what you're really gaining is insight. And what you can do with that **insight is unlimited**.

Dynamic communication makes a relationship great, and a great relationship makes all parties **be their best**.

DYNAMIC DELIVERY

Conclusion

Dynamic publishing and knowledge delivery enable an evolution from a static scenario—the provider tossing their documentation over a wall to the user—to having a detailed one-on-one conversation. The process by which an optimized search engine gathers any relevant and available content throughout the enterprise silos, customized to the user and means of delivery, approaches the ideal of having an **expert by your side**, guiding you, all the while respecting your time and your level of expertise.

Dynamic documentation delivery is a tool which enables the organization to maximize its use of data, reduce the cost of documentation, and empower its technical writers to address their users' greatest needs—to **deliver insight** instead of merely documentation.

Your customers expect speed, engagement, and effortless collaboration. Your devices border on the miraculous, delivering heightened reality, speaking directly to you, and providing contextual data on demand.

Your documentation and its delivery need to live up to that dynamic promise.

Developing publishing portals should not be the focus of your IT department... That's not what your company does. The following appendix helps you choose the solution that matches your needs.



DYNAMIC DELIVERY

10 points to check when choosing a solution

1

Multi-source capabilities with extensive content format support

Even though you start with a tactical project dealing with only one type of content, you need to think ahead if you want to be prepared for a variety of use cases and stakeholders. Make sure the solution can support multiple and **diverse input streams**, as you identify all data sources that contain information that could be beneficial to users.

2

Content enrichment capabilities

Not all content is born alike. Therefore, to deliver consistent information, particularly in a multisource environment, you need **tools to clean, align, and enrich the content**—particularly the metadata. Because building content processing workflows can be complex, make sure that the solution you select offers the necessary functions and can be extended.

3

Top-notch search engine

This is the most important aspect of a delivery solution. Regardless of the money you spend in creating content, if you can't find it, it doesn't exist. On the other side, burying users with tons of irrelevant content won't serve. The search engine has to be:

- Semantic: support for grammar and synonyms
- Full-text: every bit of every document must be indexed
- Tuned, tunable, and versatile: relevance tuning is an art, so it has to be good out of the box, but it must be extensible so that additional parameters can be part of the ranking equation (think about user profile, document popularity, freshness, etc.)
- Faceted: filters are automatically extracted from the metadata and can be offered to users for narrowing down their search
- Suggestive: with type-ahead suggestions (autocomplete)
- Typo-tolerant: the spell checker must be capable of learning
- Explicit: each result must show why it's in the list with keywords and synonyms highlighted
- Multilingual: all the above capabilities must be equally good in any language that matters to you
- Fast: millisecond-quick, regardless of the traffic

DYNAMIC DELIVERY

10 points to check when choosing a solution

4

Efficient reading

Once the user has found the info, how easy is it to read, to navigate inside the document (particularly large books), to follow internal and external links, to retrace your steps...? Is multimedia content rendered correctly, do large images and vector graphics have zoomability? Can you tune the look and feel of the content to match your branding?

5

Interactivity

Bookmarks, Alerts, Rating, Annotations, Feedback, Personal Books... features that allow you users to customize your content are essential. Pick the ones you want; too many bells and whistles may clutter up your UX. Define what makes sense in your situation and to your users.

6

Multi-device, multi-channel output

Of course, the user interface has to work perfectly on common connected devices (laptops, tablets, smartphones), so it needs a responsive interface. Integration capabilities for other solutions such as customer helpdesk tools are essential. Inline/in-device help, chatbots, or augmented reality are not just buzzwords; they are our tomorrow. So, your Dynamic Delivery platform has to be future-proof, not just by tossing in APIs, but by giving you ready-to-use add-ons and extensions.

7

Open and turnkey

You don't want a bare framework and have to spend months developing something that will need to be revamped anyway in 18 months because everything is evolving so rapidly. Therefore, make sure that the solution you choose is:

Turnkey: it provides you with 90% of your needs in matter of days or weeks. It comes pre-tuned, ready for your brand.

Open: it offers connectors, add-ons, modules, APIs, etc. It can be extended and it talks to other products so that it can be integrated into your IT landscape

Evolving: it has a vision and a roadmap, with the ability to follow the trends and needs. AR, VR, virtual agents, predictive... you'll be prepared.

DYNAMIC DELIVERY

10 points to check when choosing a solution

8

Analytics capabilities

Tracking users' behavior while searching and reading is a unique opportunity to learn about them, their problems, and your products. But for that, analytics needs to be tailored specifically, not by regular web analytics tools. Check the capabilities of the solution, how it tracks and logs, what metrics it provides by default, if it's extensible, and how the derived insight can enhance your customer support strategy (data visualization, personalization, predictive, etc.).

9

Security

Should be by design at the core of the solution (not as an added layer that can be bypassed). It should be everywhere, from search suggestions, to facets displayed, to results and documents accessed, enforced through each web service and every interface. SSO integration with support of multiple simultaneous backends must be ready out of the box. The solution should also provide mechanisms for mapping user profiles to content metadata.

10

Compliance

Regulations are putting more and more pressure on every industry. Which ones apply to you? Do you have users in Europe? Then you must comply with GDPR for data privacy. Or with Privacy Shield for US users. What about WCAG for accessibility? The list is not going to get any shorter, so it pays to be prepared.

ABOUT THIS GUIDE

Dynamic Delivery

This white paper explores the principles and benefits of dynamic delivery. It will help you understand why you must consider it and how to choose a solution.

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DYNAMIC DELIVERY

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What's behind Fluid Topics

Fluid Topics is a perfect name for a dynamic publishing product.

“Fluid” conjures images of effortless motion, smooth and easy flow, and graceful simplicity in movement or execution.

“Topics” evokes conversation, communication, learning, thinking, reasoning, education, and ideas.

Together, **Fluid Topics** conveys a smooth action or movement of reaching for and shaping information, quickly and effortlessly without limit or barriers.

That is what we do.

Contact us

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Dynamic Delivery

What it is and why it matters



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