

**Hello. It's me.
I'm here to
tell you all
about content
strategy.**



A refresher

Content strategy helps organizations provide the right content, to the right people, at the right times, **and for the right reasons.**



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Content design



Systems design

Content Strategy

- Functional strategy and goals
- Priority user needs and preferences
- Governance framework
- Measurement



Process

- How will content move through its lifecycle?
- What tools will we use to create, deliver, and maintain content?
- How and when do we care for our existing content?
- Who gets to say “no”?

Editorial

- What is our editorial mission?
- What brand and language standards do we need to comply with?
- What are our voice and tone?
- What is our publishing cadence?



Experience

- How do our users' needs inform content requirements?
- How do words shape the user experience?
- What formats will our content take?
- How will users move through our content ecosystem?

A red L-shaped graphic consisting of two rectangular blocks. The top block is taller than the bottom block, and they share a common horizontal base. The word "Structure" is written in white text on the bottom block.

Structure

- How will we organize content for browse-and-find?
- How will we categorize content for efficient management?
- How will we structure and tag our content for future reuse?
- What are the requirements for personalization, dynamic delivery, AI?

What happens when
you don't build in
content strategy

A LOT OF REALLY ORGANIZED CONTENT NO ONE NEEDS OR CARES ABOUT

AMAZING FLOWS AND INTERACTIONS FOR CONTENT AND TASKS THAT DON'T MATTER

CONTENT FEATURES THAT CANNOT BE MAINTAINED AFTER LAUNCH

NO FRAMEWORK FOR SAYING NO TO IDEAS THAT DON'T MAKE SENSE

7 tools and templates

1. Content audit
2. The stakeholder matrix
3. Strategic alignment workshop
4. Insights engine
5. Hero's journey
6. Capabilities and roles assessment
7. Measurement framework



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#1 : Content audit



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Content audit

Use to validate assumptions about what's going on with your content quantitatively.

PAGE ID	DATE	PAGE NAME	URL	PC
3.17	2/4/2008	How can I explain to my daughter that Grandpa died?	http://www.extension.org/fag/29557	AP
3.18	1/29/2008	How do you negotiate sibling relationships and family (parents) caregiving?	http://www.extension.org/fag/27493	AP
3.19	1/29/2008	My brother and I care for my mother. My brother thinks that older people would be happier to live in assisted living facilities and that the majority of older people live in groups now. Is that true?	http://www.extension.org/fag/29903	AP
3.2	5/15/2010	Sometimes I have a hard time remembering things. Is memory loss a normal part of aging?	http://www.extension.org/fag/24271	AP
3.20	1/23/2008	Where do I start to find out what county resources are available for aging adults?	http://www.extension.org/fag/36222	AP
3.21	1/23/2008	I'd like to hire someone to stay with my mother, who currently lives with me. She's able to care for herself, but because of her poor memory she's fearful when alone for long periods of time. She still has a vacation home in another town. (continues)	http://www.extension.org/fag/36225	AP
3.22	1/22/2008	I care for someone who is bedridden. Whom should I call for help with evacuation during a disaster.	http://www.extension.org/fag/24999	AP
3.23	1/17/2008	A home health care worker comes to our home three times a week to check my husband's dialysis machine and to give him an infusion treatment. Evacuation will be nearly impossible. Will she still come as usual?	http://www.extension.org/fag/28129	AP
3.24	1/16/2008	My husband has lung cancer. Can you give me a checklist of things I should have on hand if the electricity should go out?	http://www.extension.org/fag/28118	AP



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Hypothesize what's wrong

The majority of the content on your site is for <audience a>, but you're really trying to increase sales with <audience b>.



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Hypothesize what's wrong

There's a disparity between the content people actually use and the content we spend time and resources creating.



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Hypothesize what's wrong

The content doesn't reflect your voice
and tone.



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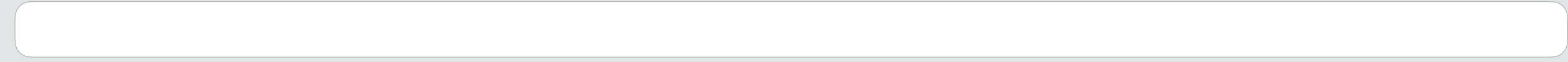
Hypothesize what's wrong

You think there's a problem with your meta descriptions—your content ranks pretty high, but people don't click.



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Hypothesize what's wrong

Your calls to action are weak or missing altogether.



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Hypothesize what's wrong

Your content is out of date.



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Hypothesize what's wrong

Your content is hard to read and use. It's long, overly complicated, unstructured, and unorganized.



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Hypothesize what's wrong

Your customers can't find self-service information and customer support is overwhelmed with calls and emails.

Look at the content itself

Examples of things you can review objectively:

- Who is the content for?
- Is it written inclusively?
- What is the purpose of the content?
- Is the content up to date?
- Is it optimized for SEO
- Are there broken links or links that go to the wrong place?
- Is there a call to action?
- Is it following our voice and tone?
- Are standard web content best practices, including accessibility, being followed?



ATTRIBUTE	CELL VALUES	RESEARCH QUESTION	WHAT YOU'LL LOOK FOR
Audience	C-Level Manager Media Unclear	Who does the content appear to be written for?	<ul style="list-style-type: none"> Call to action (CTA) that suggests a role Level of complexity Nature of the content
Voice and tone	Yes Somewhat No	Does the content portray the desired voice and tone?	<ul style="list-style-type: none"> Content that clearly embodies our defined voice and tone attributes of x, x, and x.
Clarity	Yes Somewhat No	Is the message conveyed clearly and effectively?	<ul style="list-style-type: none"> Descriptive title and headings Logical information hierarchy Plain language Persuasive CTAs
Readability	Yes Somewhat No	Does the content employ writing, style, and formatting best practices?	<ul style="list-style-type: none"> Simple, short sentences Little to no jargon Headings and lists Active voice

Defir

PAGE ID	DATE	PAGE NAME	URL	FORMAT	KNOWLEDGE LEVEL	INTER-RELATEDNESS	RELEVANCE	USABILITY	ACTION-ABILITY	DIFFERENTIATION	NOTES
3.17	2/4/2008	How can I explain to my daughter that Grandpa died?	http://www.extension.org/faq/29557	ANSWER	1-LOW	2-MEDIUM	3-HIGH	1-LOW	2-MEDIUM		INTERRELATEDNESS: Links to external sites br USABILITY: Lack of subheads/bold/etc. ACTIONABILITY: Instructional text in article, bu
3.18	1/29/2008	How do you negotiate sibling relationships and family (parents) caregiving?	http://www.extension.org/faq/27493	ANSWER	1-LOW	2-MEDIUM	3-HIGH	1-LOW	3-HIGH		INTERRELATEDNESS: Links to external sites br USABILITY: Lack of subheads/bold/etc.
3.19	1/29/2008	My brother and I care for my mother. My brother thinks that older people would be happier to live in assisted living facilities and that the majority of older people live in groups now. Is that true?	http://www.extension.org/faq/29903	ANSWER	1-LOW	3-HIGH	3-HIGH	1-LOW	2-MEDIUM		USABILITY: Lack of subheads/bold/etc. ACTIONABILITY: No clear CTA other than get m
3.2	5/15/2010	Sometimes I have a hard time remembering things. Is memory loss a normal part of aging?	http://www.extension.org/faq/24271	ANSWER	1-LOW	3-HIGH	3-HIGH	1-LOW	3-HIGH		USABILITY: Lack of subheads/bold/etc.
3.20	1/23/2008	Where do I start to find out what county resources are available for aging adults?	http://www.extension.org/faq/36222	ANSWER	1-LOW	2-MEDIUM	3-HIGH	1-LOW	3-HIGH		INTERRELATEDNESS: No links to related conter site. Okay tagging. USABILITY: Lack of subheads/bold/etc.
3.21	1/23/2008	I'd like to hire someone to stay with my mother, who currently lives with me. She's able to care for herself, but because of her poor memory she's fearful when alone for long periods of time. She still has a vacation home in another town (continues)	http://www.extension.org/faq/36225	ANSWER	1-LOW	1-LOW	3-HIGH	1-LOW	3-HIGH		INTERRELATEDNESS: No links to related conter site. Seems odd to give Alzheimer's link as resc USABILITY: Lack of subheads/bold/etc. Extre consider providing short title.
3.22	1/22/2008	I care for someone who is bedridden. Whom should I call for help with evacuation during a disaster.	http://www.extension.org/faq/24989	ANSWER	1-LOW	3-HIGH	3-HIGH	1-LOW	3-HIGH		USABILITY: Lack of subheads/bold/etc.
3.23	1/17/2008	A home health care worker comes to our home three times a week to check my husband's dialysis machine and to give him an infusion treatment. Evacuation will be nearly impossible. Will she still come as usual?	http://www.extension.org/faq/28129	ANSWER	1-LOW	2-MEDIUM	3-HIGH	1-LOW	3-HIGH		INTERRELATEDNESS: Good tags, but no links to USABILITY: Lack of subheads/bold/etc.
3.24	1/16/2008	My husband has lung cancer. Can you give me a checklist of things I should have on hand if the electricity should go out?	http://www.extension.org/faq/28118	ANSWER	1-LOW	2-MEDIUM	3-HIGH	1-LOW	3-HIGH		INTERRELATEDNESS: Good tags, but no links to USABILITY: Lack of subheads/bold/etc.



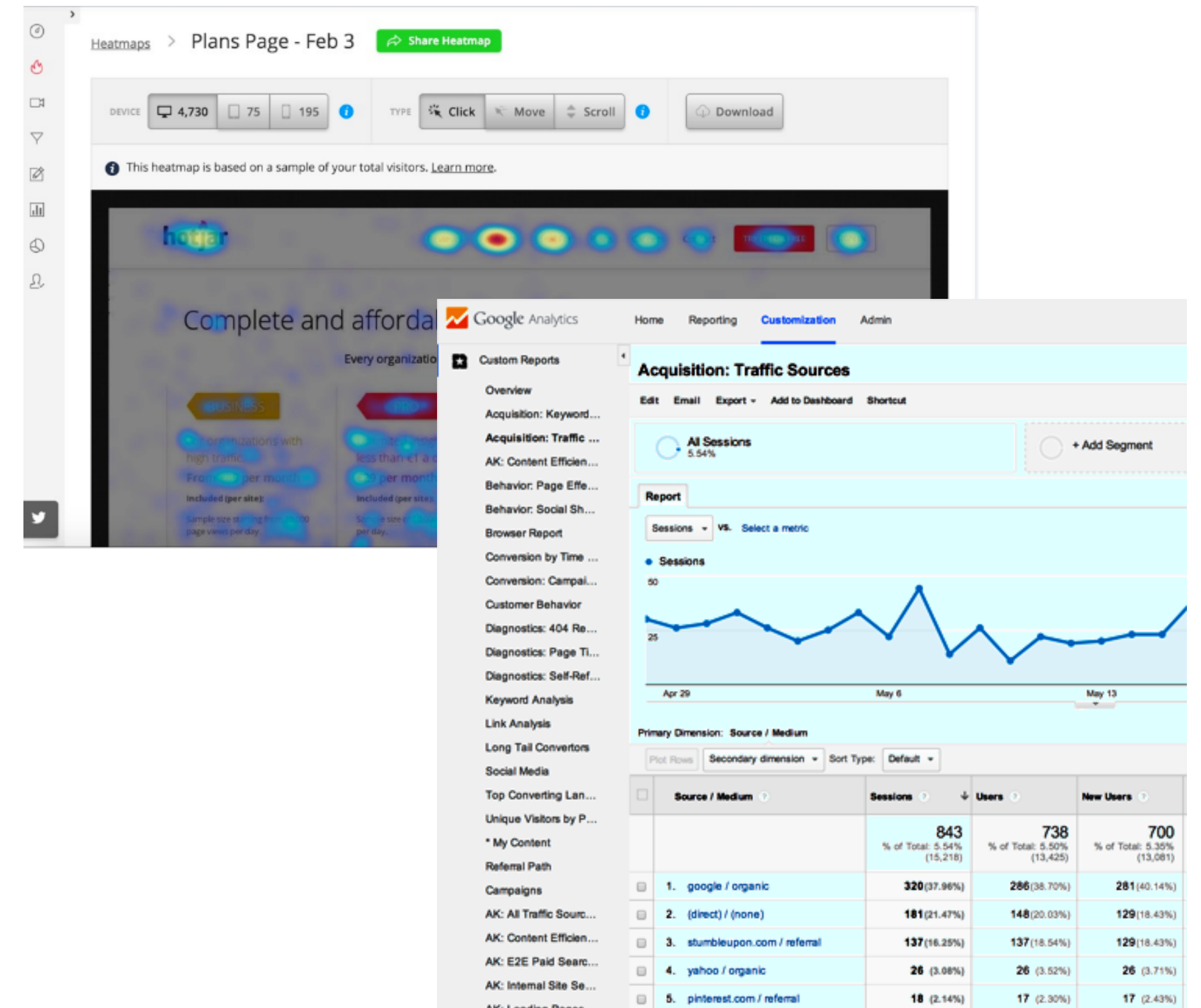
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Look at data about the content

Collect and analyze data like:

- How do people arrive at our site?
- What pages are viewed the most?
- What do people search for on the site?
- Are our users more likely to use navigation or search to find information?
- What paths to people take through our site?
- Do people click on our calls to action?
- How do visitors get to our site?





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RESEARCH QUESTION

What do users do after visiting *<key page from which you expect the user to respond to this CTA>*?

What are people searching for when they arrive on your site?

What pages are visited most frequently, and how do people get to them?

DOCUMENTATION

Percentage for each path of the total paths a user takes from this page during xx time period

Top xx search terms monthly

Top xx pages and percentages for each path users take to get to them



PROBLEM

You are creating half as much content for your primary audience as you are for less important audiences.

IMPLICATIONS

- Misuse of writing resources
- Perception that you don't care about the primary audience
- Primary audience unable to find content that is relevant to them

OPPORTUNITY

Do user research to better understand users' needs along the customer journey so you can spend your writing time and budget on fixing or creating the content most likely to lead to conversions.



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#2: Stakeholder matrix



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BLOG.WINSPIREME.COM

Engaged stakeholders

The key to a successful content strategy project



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ROLES

TYPES

Name and Title	Project Owner	Decision maker	Influencer	Champion	Derailer	Strategic	Expert	Implementer	User Proxy	Interview	Workshop	Top Wh
Jane Doe Director, Digital Marketing		X		X		X						Exp How Pas wha



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Who are they?

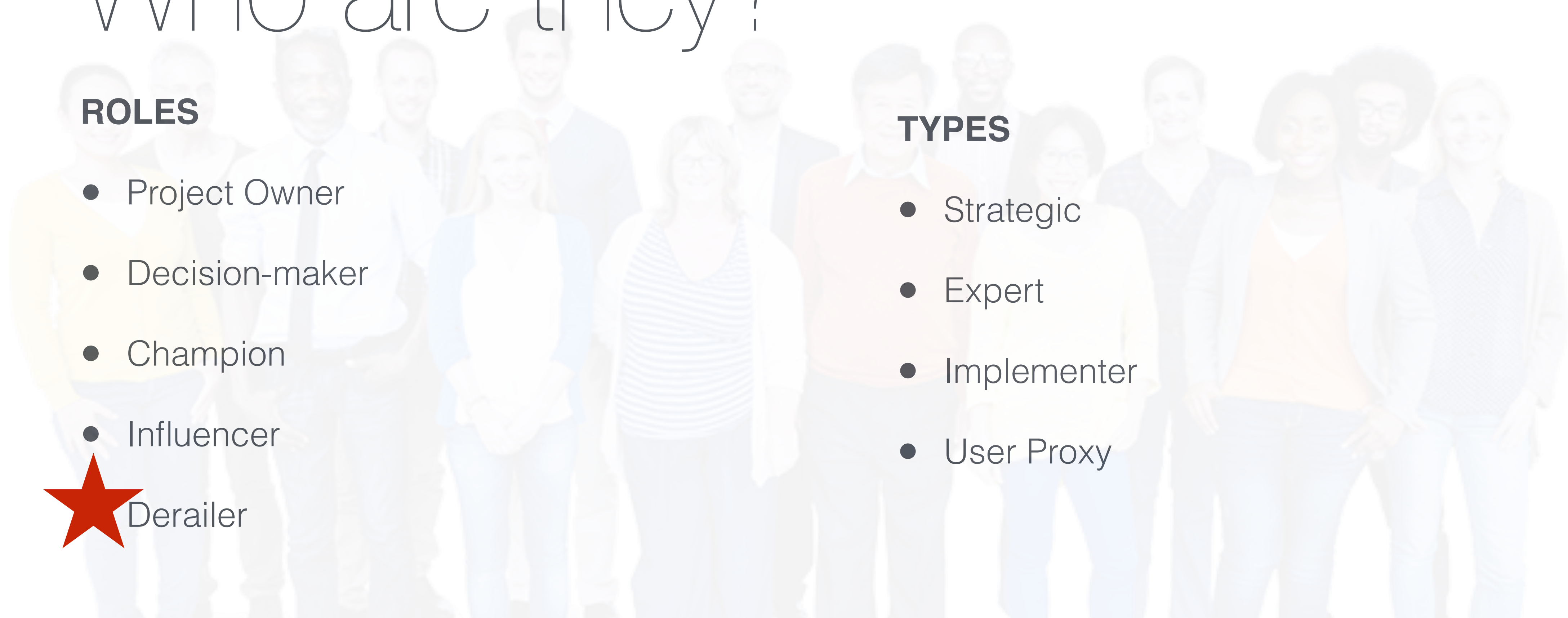
ROLES

- Project Owner
- Decision-maker
- Champion
- Influencer

 Derailer

TYPES

- Strategic
- Expert
- Implementer
- User Proxy





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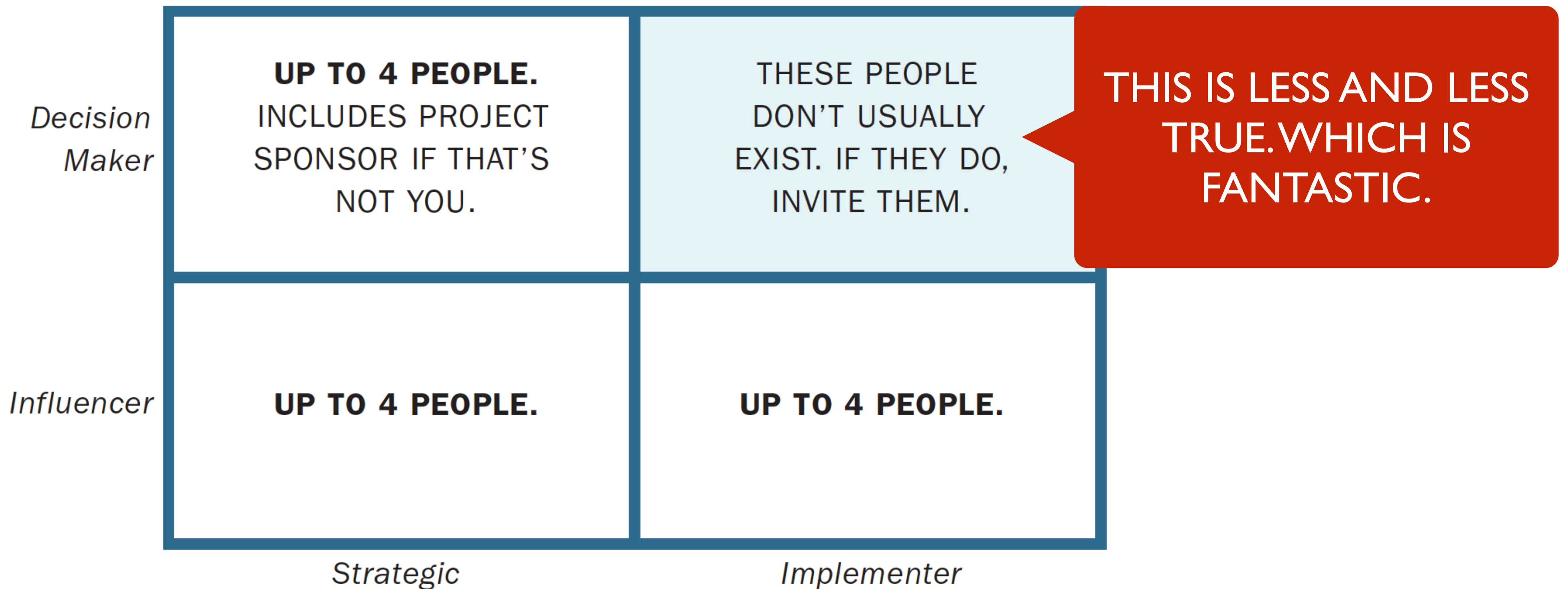
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#3: Strategic alignment
workshop



Get the right people in the room





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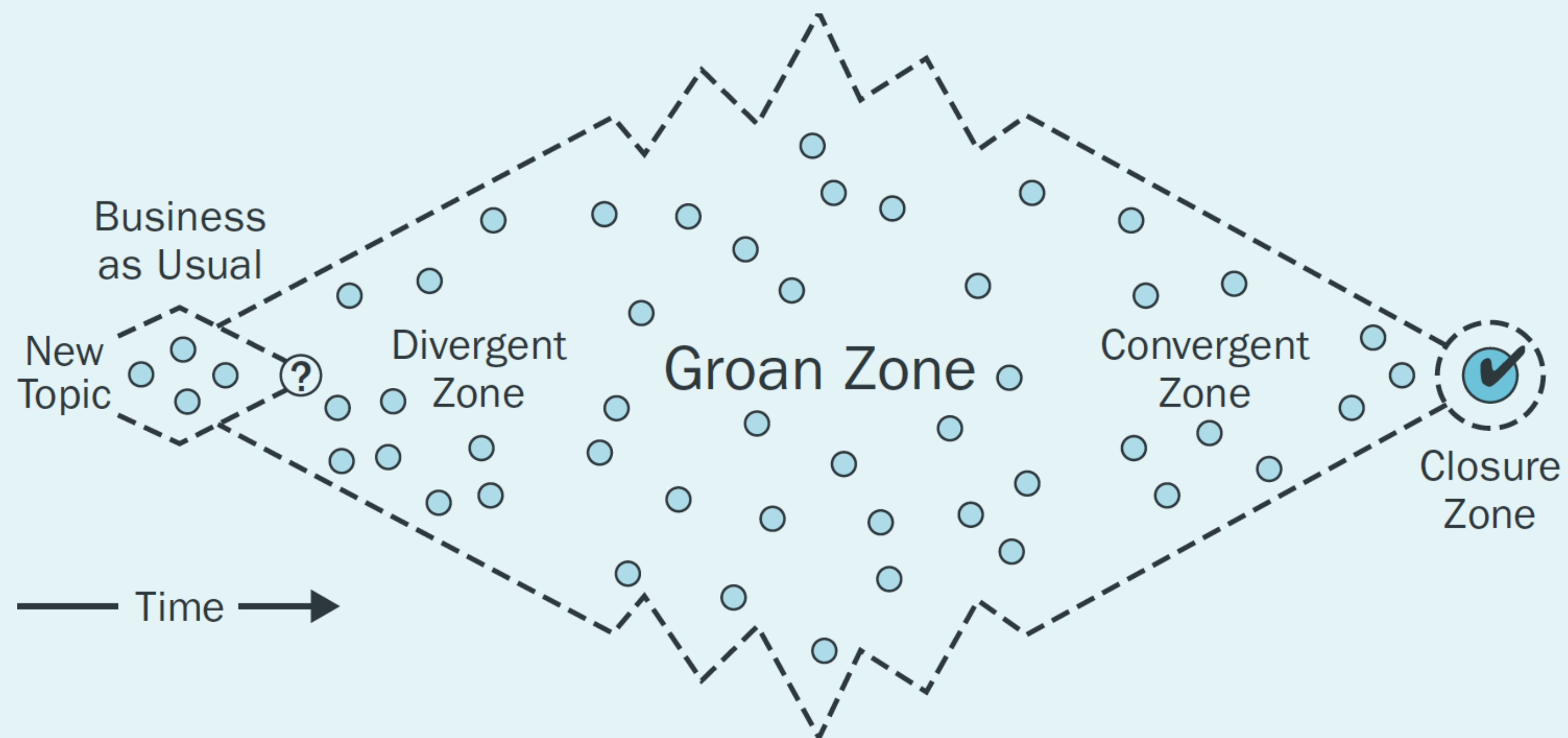


Make a plan



ACTIVITY	DURATION
Background and Ground Rules: Explain the project, why people were invited, and the rules you expect participants to follow.	15 minutes
Introductions: Share your name, your title, and why you were invited.	30 minutes
Individual Exercise and Discussion: Fill out the worksheet that covers business/department/team goals, problems and opportunities, and personal viewpoints, and then discuss with the group.	30 minutes
Problems Post-up and Grouping: Brainstorm problems this project should help solve, and then group them into categories.	45 minutes
Perfect World Post-up and Grouping: Brainstorm how things will be different if the project is successful, and then group into categories.	30 minutes
Reality Brainstorm: Make two columns on the board, and brainstorm—based on the previous two activities—what this project can help with and what it can't realistically improve or change.	20 minutes
Objectives Synthesis: Work together to synthesize the identified problems, perfect world, and reality items into project objectives.	60 minutes
Roadmap: Brainstorm the steps necessary to reach the objectives, and then map them to a timeline; have each person say where they think they need to be involved and how.	60 minutes
Recap and Next Steps: Summarize the progress you made in the session and what will happen next.	15 minutes

Alignment can be hard





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#4: User understanding
matrix



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What do we hope to learn?



CONCERNS
BEHAVIORS
ATTITUDES AND BELIEFS
MOTIVATIONS
EXPERIENCES



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Put it on paper

- **We wonder** ... This is the question you hope to answer through user research.
- **We care because** ... This is why the information is important to your project.
- **We assume** ... This is what you assume to be true based on your discovery work.
- **We know** ... This is anything you feel confident you actually know about users.



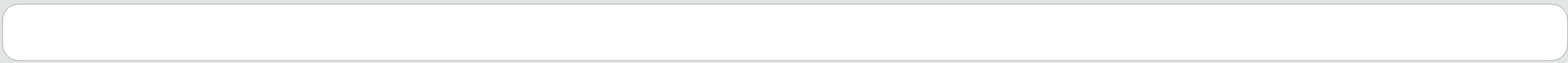
User understanding matrix

WE WONDER...	WE CARE BECAUSE...	WE ASSUME...	WE KNOW...
What concerns do potential customers have about dental care for themselves and their families?	We want to address these concerns effectively on the website.	Parents want to get everyone in at the same time and are worried we can't accommodate their schedules.	
Are people likely to find a dentist for their family before they actually need one?	It affects whether we prioritize positioning about our philosophy and credentials versus information about getting an appointment in an emergency or on short notice.	A lot of people aren't proactive about finding a dentist.	Ten people have called for emergency appointments in the first month we were open after finding us in their insurance providers' online directory.



Add in risk when you need to prioritize ...

RISK TOLERANCE	I AM NOT VERY CONFIDENT IN OUR USER KNOWLEDGE, AND I'M NOT THAT WORRIED ABOUT WHAT WE DON'T KNOW.	I AM PRETTY CONFIDENT IN WHAT WE KNOW ABOUT USERS, AND I DON'T THINK THE GAPS ARE A BIG DEAL.
	I'M NOT SURE WHETHER WE KNOW VERY MUCH ABOUT OUR USERS, AND I'M UNCOMFORTABLE NOT KNOWING MORE.	I FEEL PRETTY GOOD ABOUT WHAT WE KNOW ABOUT OUR USERS, BUT I'D FEEL BETTER IF WE VALIDATED IT.
	CONFIDENCE LEVEL	



We wonder

We care because

We assume

We know

Risk

Do prospective students graduating from high school care as much about money as their parents do?

It affects who we write financing and financial aid messages for and where that information lives and is linked to on our website.

Parents who are paying for college care more than their children and kids paying for their own need that information to even consider our school.

We don't have any definitive data.

High



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#5: Hero's journey

Learn your users' stories

- What prompts them?
- Who or what do they look to for help or information?
- What stands in their way?
- What do they learn or do?
- How is their situation changed?
- What do they do next?



JOSEPH CAMPBELL, THE HERO WITH A THOUSAND FACES

1

Caleb was shocked to learn from a story on the news that there are more than 6,000 homeless youth in Los Angeles. He decided he wanted to donate some of his graduation money to help.

2

Caleb headed to Google to do some research. He found a lot of organizations that worked with homeless youth, but wasn't sure what one(s) he wanted to give to.

3

He found two organizations, My Friend's Place and Covenant House, that focused on serving homeless kids. He asked his mom, who volunteers at a food shelf and clothing donation center, what she knew about the organizations he found. She had heard of both of them, and was partial to Covenant House because of its religious affiliation. That wasn't as important to Caleb, but he valued his mom's opinion.

4

Caleb decided to take a closer look at Covenant House and My Friend's Place before he decided. So, he went to their website to find out more. He really liked that My Friend's Place partnered with a vet to help homeless youth take care of their pets. It was also cool that one of their counselors used to be a client and now works there full time. And they do really awesome things like help kids develop musical talents and make money off their art. Covenant House was a good organization, too, but My Friend's Place inspired Caleb ... he thinks he might also want to volunteer.

5

Caleb decides to give some of his graduation money to My Friend's Place and goes back to their site. There's a pretty clear link to donate, so that part is easy. But, he's never made a charitable donation before and he's not really sure about some of the logistics and has some other questions. What does it mean to make a designation? Can he just make a one-time donation or will they keep charging his card? Will they keep him informed about how his gift is making a difference?

6

Caleb starts the online donation process, but needs to stop it and start it a few times to get the answers to the questions he has about one-time or recurring donations and donations to a specific program vs. the general fund. He does find all the information on the website, but it's pretty frustrating. He almost gives up, but is worried he won't ever go back and do it and will spend the money on something else.

8

Caleb didn't really believe his mom when she told him about that givers' high some people get, but making a donation felt great. The next week, he saw on Twitter that My Friend's Place was looking for volunteers to help out with the annual Count the Homeless night in LA. Caleb signed up and got a couple of his friends to join him. When Caleb is home from college on breaks, he plans to volunteer at My Friend's Place, too.

7

Caleb finally gets through the online donation form and decides to make a one-time donation to the general fund. He also signs up for the donor newsletter and follows My Friend's Place on twitter to keep up on what they are doing with his donation.



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Boil it down

As a

young person new to charitable giving looking for ways to make an impact on youth homelessness in my community

I need

to know how My Friend's Place programming makes a difference in the lives of homeless youth

so that I can

decide whether to make a gift to My Friend's Place or another organization. ■

#6: Capabilities and roles assessment

Characteristics of optimized processes

- You have documented processes with associated standards, guidance, training, and enablement easily accessible for the entire content lifecycle.
- You have the right people, with the right capabilities are empowered and enabled to do the right work.
- Everyone involved with content understands their role and responsibilities and there are mechanisms of accountability for those responsibilities.
- You have just enough process to efficiently plan, create, measure, and maintain on-strategy content.
- You have built experimentation, iteration, and collaboration into your processes.

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Skillsets, Roles, & Responsibilities

Skillsets			
Description	Got it covered	Could do better	Uh oh
Analysis - Ability to gather strategic business and user insights through stakeholder interviews, documentation review, content audits, competitor review, etc.			
Strategy - Ability to develop a vision for content, such as setting the editorial strategy, providing actionable recommendations, selling the strategy and securing alignment, identifying the artifacts needed to support people in executing on the strategy, measuring the success of the content strategy, and managing the behavior change required to be successful			
Content Design - Ability to translate strategy into content requirements through deliverables like content models, taxonomy schemas, sitemaps, wireframes, etc.			
Process Design - Ability to analyze content-related processes, including workflows and roles, to recommend improvements and communicate processes changes to team members			
User Experience - Ability to investigate user needs and develop documentation and tools, such as user journeys, personas, and user process flows			
Web Writing - Ability to execute on the content strategy and content design with website content that meets core web writing best practices, such as readable, easy to comprehend, actionable, and user-centric			
Project Management - Ability to manage content efforts from ideation to publishing while juggling multiple priorities and staying attuned to stakeholder needs and obligations			
What might you do to address gaps in your institutions content skillsets?			

Skillsets, Roles, & Responsibilities

List the people or teams who work on content. Be as specific or general as it makes sense for your organization	
Example - Alumni relations web writer	Example - PR & Communications team
1 -	6 -
2 -	7 -
3 -	8 -
4 -	9 -
5 -	10 -

Responsibilities	
Description	List who (by no.) from the above list fulfills each responsibility.
Lead the development and evolution of the content strategy	
Manage content planning and prioritization process	
Ensures that governance artifacts are created, shared, and used	
Defines success metrics for content and manages measurement work	
Represents content strategy throughout the organization	
Manages and prioritizes unplanned content requests	
Facilitates day-to-day content creation, review, and publishing	
Reviews content for adherence to strategy and brand guidelines	
Mentors content creators and business partners about content creation	
Develops and maintains an editorial calendar for "promo" spots on site	
Manages the content maintenance process	
Creates content outlines for approval	
Writes website content	
Enters content into the CMS for publishing	
Proofs content for grammar, typos, etc., before publishing	
Creates content requirements documentation (sitemaps, wireframes, etc.)	
Ensures content has been entered correctly into the CMS before publishing	



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#6: Measurement framework

Measurement definitions

- **KPIs:** How an organization determines, with data, whether it's meeting its goals.
- **Objective:** How a tactic should influence a KPI.
- **Metric:** How you determine whether an objective influenced a KPI.

ENGAGEMENT IS NONE OF THESE THINGS.



BUSINESS KPI

Member Acquisition

CONTENT OBJECTIVES

- Demonstrate the value the association provides for professionals just entering the profession or industry.
- Describe the benefits of becoming an association member.

METRIC

QUANTITATIVE OR QUALITATIVE

METHOD(S)

FREQUENCY

Number of new member sign-ups from website

Quantitative

Analytics

Monthly

Top paths to sign-up page

Quantitative

Analytics

Monthly

Clear membership-related CTAs when appropriate

Qualitative

Heuristic Assessment

Annually

Messages about the value for early-career professionals

Qualitative

Heuristic Assessment

Annually

User satisfaction with website content

Quantitative

User Feedback (survey)

Quarterly

User comprehension of membership benefits

Qualitative

User Feedback (in-person)

Biannually



BUSINESS KPI		CONTENT OBJECTIVES	
Member Acquisition		<ul style="list-style-type: none"> ■ Demonstrate the value the association provides for professionals just entering the profession or industry. ■ Describe the benefits of becoming a member of the association. 	
METRIC	ASSESSMENT	HIGHLIGHTS	
Number of new member sign-ups from website	Satisfactory	User survey results suggest that people who signed up on the site knew they wanted to sign up before that particular site visit.	
Top paths to sign-up page	Neutral	The primary path to the membership page is site search, suggesting that users are most likely to come to the site specifically for the purpose of signing up. Secondary paths were from beginner-level content with a CTA to become a member for expert-level content.	
Clear membership-related CTAs when appropriate	Satisfactory	CTAs could be better tailored to their placement, so that you're not asking people to consider membership before you've demonstrated your value.	
Messages about the value for early-career professionals	Neutral	Although they were satisfied with the resources available, early career professional user-research participants did not feel content was particularly targeted toward their context.	
User satisfaction with website content	Satisfactory	Ninety percent of survey participants said they found what they were looking for when they visited the site and eighty-five percent said the information was useful.	
User comprehension of membership benefits	Unsatisfactory	Although we feel the content includes messaging about the value the organization provides, users could not easily describe the benefits of becoming a member.	



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Repeat after me . . .



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I am so freaking smart.



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Questions
before I
go?

