# INTRODUCTION

Hi. I'm glad you picked up this book. I wrote it because I've often wished for a resource chock-full of tools and insights that would help me solve my clients' content problems. That stuff is out there, but you kinda have to dig for it.

I should probably level-set about how I approach content strategy. My approach takes into account a lot of really great definitions, like:

> "Content strategy plans for the creation, publication, and governance of useful, usable content."
>
> —Kristina Halvorson, president of Brain Traffic and author of *Content Strategy for the Web*

> "Content strategy uses words and data to create unambiguous content that supports meaningful, interactive experiences."
>
> —Rachel Lovinger, experience director and content strategist at Razorfish

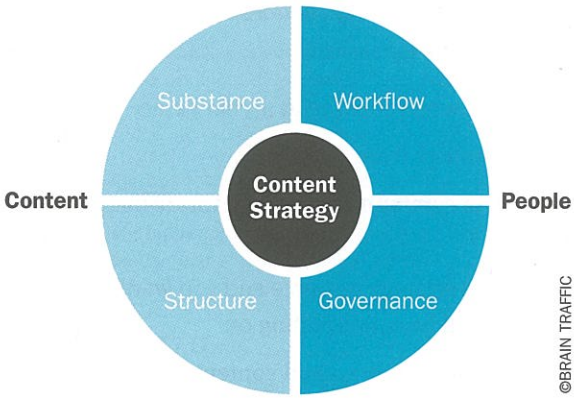
> "Content strategy deals with the planning aspects of managing content throughout its lifecycle, and includes aligning content to business goals, analysis, and modeling, and influences the development, production, presentation, evaluation, measurement, and sunsetting of content, including governance. What content strategy is not is the implementation side. The actual content development, management, and delivery are the tactical outcomes of the strategy that need to be carried out for the strategy to be effective."
>
> —Rahel Anne Bailie, principal of Intentional Design and coauthor of *Content Strategy: Connecting the Dots Between Business, Brand, and Benefits*

Here's my working definition:

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

"For the right reasons" is the most important phrase in that definition. Without clarity about the why—the purpose—it's almost impossible to meet user needs or achieve business goals. Content strategy defines content purpose, then guides planning for the creation, publication, and maintenance of that content.

I'm a fan of Brain Traffic's content strategy "quad."




The quad framework makes a lot of sense because it binds together everything that goes into creating successful content experiences by purpose. The inner circle of the quad is the core content strategy—the content *purpose*.

Surrounding the core strategy are four quadrants:

- **Substance** defines what content the organization should produce, how it should sound, and why it's meaningful or relevant to users.
- **Structure** refers to how content is organized and displayed so users can find and use the content they need.
- **Workflow** is how content flows through the organization—from ideation to publication to ongoing maintenance.
- **Governance** details how the organization makes decisions about content to ensure that it's on-strategy.

I'll refer to these quad areas throughout the book. I hope you find it to be a helpful framework.

As you work your way through *The Content Strategy Toolkit*, keep in mind: This book is not a manual you can follow to do content strategy for every project. That's not how content strategy works—really, does any project or process? Standard methodologies might feel safe, but they're actually dangerous. You need flexibility, agility, and a bunch of tools to get the work done. Some of the tools in the kit are going to apply to your situation and some aren't. Some might apply, but only if you adapt them to a specific need or evolve them based on your own experience. And you should!

## WHO THIS BOOK IS FOR

It's for you! Seriously, if you picked up this book, chances are good you are:

- An aspiring content strategist
- An experienced content strategist who's looking to up her game
- A manager building a content strategy team
- A designer, developer, marketer, or communicator who wants to make content strategy a part of your process
- About to hire a third-party content strategy resource and you want to become familiar with the type of work you'll be collaborating on
- An educator teaching a class on digital design and content

If you're not on this list, that's OK. You can still read it.

## HOW TO USE THIS BOOK AND GET THE TOOLS

If you're new to content strategy or if you're working on your first content strategy project, I recommend you read the book sequentially. It can serve as a manual for your project. Just keep in mind that no project is exactly the same, and you'll need to modify for your needs.

For those of you who have a few content strategy projects under your belt, the book can be an encyclopedia. You might reference it for ideas at specific times in your project or for an idea from one of the included tools.

As you're reading or flipping through the book, you'll notice some hints and tips. An explanation for each is included in the examples to the left.

**HINT**
*These provide you with information on where to find additional resources. They might remind you where to find material that has already been covered or refer you to other sources.*

**TIP**
*These provide information to help you with the current task (tips-of-the-trade if you will).*

Text that appears in angle brackets and in italics is a **placeholder** used to demonstrate a concept. Here's an example: You assume that *<company>* will complete the site inventory and that *<agency>* will use the inventory to conduct the audit.

Each chapter contains one or more tools with explanations related to how they apply that chapter's tasks. You can find them easily because the pages with tools on them will be visible when you flip through the book.

CONTENT STRATEGY TOOL 7.2

## USER RESEARCH WORKSHOP ACTIVITIES

Download the sample workshop plan to get more-specific instructions and templates for conducting the workshop described in this chapter.

### TIPS

- Adapt the exercises to your situation. For example, if you're not all in the same room, you might brainstorm in a Google doc that everyone can see or use an online brainstorming tool.
- During the user story exercise, listen in on participants' conversations to get even more insights that might not make it into their worksheet.

### WHERE TO GET IT

Download the workshop plan at www.peachpit.com/register.

### WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

Or, you can use the appendix to find which tools are in each chapter in case you need a quick review.

To access and download the tools:

1. Visit peachpit.com/register.
2. Log in with your Peachpit account, or if you don't have one, create an account.
3. Register using the book's ISBN, 9780134105109, to download the zip file, ContentStrategyTools.zip, that contains all the tools.

## ONE LAST THING

I don't really have much more to say. It just seems rude to send you off with a set of instructions.

So, let's get started. Get comfy. Grab a cup of coffee or whatever else you'd like to drink. Find some sticky notes and a highlighter. Keep your computer handy to download any must-have-right-now tools. (Hmmm, this is sounding like a set of instructions.)

Most of all, enjoy!

CHAPTER 1

# IDENTIFY PROBLEMS AND OPPORTUNITIES

Your company, organization, or client likely has problems with web content. Those problems have probably led to decreased productivity and profit. That's why you bought this book. Or maybe someone gave you this book because you've been entrusted to find and fix content problems.

That's the bad news. The good news is that all of us who do work on the web have the same or similar problems. And those problems are opportunities to do something worthwhile, like make the Internet a better place.

In this chapter, I give you some ideas and tools for determining what's wrong with your content, what role your workflow might play in what's going wrong, and how to turn your content problems into opportunities to do great work for the organizations you work with.

# FIGURE OUT WHAT'S WRONG WITH YOUR CONTENT

You might want to dig into what's wrong with your content for several common reasons:

- You're about to embark on a website redesign, and you've decided to take a content-centric approach, starting with content strategy. Yay, you.
- Your website redesign is underway—launch is imminent—you've realized the content is a mess, and you don't want to launch a beautiful new site with crappy content. I'm really, really sorry.
- You're migrating to a new content management system (CMS) or using a CMS for the first time, and you have to get all your content from where it is now to the CMS. While you're at it, you want to fix the content you've wanted to fix for a long time. Smart plan.
- You're working on adding more structure to your content so it can be displayed various ways and on multiple devices and screen sizes. So you're going to clean it all up as you implement the content models. Structured content—exciting.
- You just know deep down in your heart that your content could and should better meet the needs of your organization and its audiences. And you are determined to make it so. Onward, content warrior.

Whatever the trigger, chances are you have a pretty good idea what's wrong at a high level but haven't been able to adequately document and quantify those issues. Your hunches are usually the best place to start—sort of like an experiment.

## HYPOTHESIZE WHAT'S WRONG

The first step of documenting what's wrong with your content is to record your hypotheses, just as you would in an experiment. Here are some example hypotheses to get you thinking:

- The majority of the content on your site is for *<audience a>*, but you're really trying to increase conversions with *<audience b>*.
- Your content isn't written in a way that represents your desired voice and tone, or it doesn't elicit the reactions or perceptions you want your key audiences to have.

- You don't think you've provided good enough meta descriptions—your content ranks well, but you don't get the clicks you think you should.
- Your calls to action aren't very strong or don't always exist—users aren't doing what you hope they'll do after visiting a page.
- You don't think your content supports the reasons people visit your site—people come there most often to do *<this thing>*, but most of your content is about *<that thing>*.
- Your site contains a lot of outdated content, such as wrong information or links to pages that no longer exist.
- The content is not very readable—it's long, it's not organized well, important information is buried—and you think your audiences just click the Back button when they get to most of your pages.
- Visitors can't find anything on your site, so you get a ton of customer support calls and emails.

Documenting your hypotheses is super important because it helps you focus on what you want to learn about your content and what method you'll use to learn it.

## CHOOSE YOUR METHODS

Once you've documented your hypotheses, you can decide how you'll prove or disprove them. Not all hypotheses can be proved or disproved using the same method, which is why I recommend combining the methods from the following three sections to get the broadest look at what's wrong.

### CONTENT AUDIT

You can conduct a content audit yourself or hire a content strategist to help. In a content audit, you'll typically be looking for things you can evaluate objectively: what audience the content is for, what the intended purpose of the content is, whether links are broken or go to the wrong place, whether pages aren't accessible through the navigation, how long the content is, and how easy it is to scan and understand the key message(s). See the **Content Strategy Tool 1.1** for an example audit.

CONTENT STRATEGY TOOL 1.1

## AUDIT SPREADSHEET

Download the audit template workbook so you don't have to start from scratch. It contains templates for the audit sheet (where you can collect your data) and a fancy summary sheet with formulas that pull in data from your audit sheet(s).

### TIPS

- If you're auditing more than 1,000 pages of content, use a site crawler such as Content Insight to import the site structure and URLs.
- Consider whether you need to audit every page of your website or whether a representative sample will give you what you need.
- You might want to use more than one sheet in your audit, especially if you are auditing more than one property or if breaking down your data by section will be useful.

### WHERE TO GET IT

Download the audit template workbook with instructions included at www.peachpit.com/register.

### WHERE IT CAME FROM

Brain Traffic @petegale, (www.braintraffic.com)

**TIP**
*Disproving your hypotheses may make you feel as though you failed. But really, the opposite is true. Instead, you've discovered an area in which you're doing better than you thought, and you can focus your efforts on the stuff that really needs help.*

## ANALYTICS REVIEW

With an analytics review, you can look at things like pageviews, user paths through content, common search terms, devices and browsers used, and traffic sources.

## USER TESTING

Getting insights from actual users is a great way to add some subjectivity to your assessment. You can look at things like how content makes a user feel, how easy your content is to understand, and how findable key content is. See the **Content Strategy Tool 1.2** for an overview of a content testing method.

**Table 1.1** includes a few examples from the previous hypotheses list.

CONTENT STRATEGY TOOL 1.2

## A SUPER SIMPLE USER TEST

The fine folks at GOV.UK have been rocking content strategy and content development for several years now. This super simple user test gives some great insights about your content.

### STEPS

1. Choose a few key pages from your site, and print copies for each participant and one for you.
2. Ask participants to read the content. Have them highlight in green the content that makes them feel *<confident, smart, ready to act>*, and highlight in red the content that makes them feel *<less confident, confused, hesitant>*.
3. Once all participants have highlighted their pages, start with a clean copy and highlight everything your participants highlighted in the corresponding colors.
4. Take a deep breath and look at the intensity of the green and red highlights to see where your content is doing pretty well and where it really needs work.

### TIPS

- Ask participants to highlight for only one set of adjectives (such as more confident, less confident). Pick the set that is most important to your organization.
- When analyzing the results, pay more attention to the darkest highlights, which represent patterns.

### WHERE IT CAME FROM

Pete Gale, @petegale, GOV.UK (www.gov.uk)

TABLE 1.1 **CONTENT ASSESSMENT HYPOTHESES AND METHODS**

| HYPOTHESIS | AUDIT | USER TESTING | ANALYTICS |
|---|---|---|---|
| The majority of the content on your site is for *<audience a>*, but you're really trying to increase conversions with *<audience b>*. | X | | X |
| Your content isn't written in a way that represents your desired voice and tone, or it doesn't elicit the reactions or perceptions you want your key audiences to have. | X | X | |
| Visitors can't find anything on your site, so you get a ton of customer support calls and emails. | | X | X |

## SET UP YOUR EXPERIMENTS

Now that you know what methods to use, you can get specific about what to measure and how to do the measuring. For each method, document what you'll look for to prove or disprove your hypotheses and how you'll document or gather the findings.

*HINT*
*You might be able to reuse some of what you come up with here when you develop your scorecard for measuring content performance later. And the assessment, or at least some of it, can be used as a baseline. More in Chapter 12.*

### AUDIT

You should start with the audit, but before jumping into it, get really specific about the criteria you'll use to assess your content. I put together an audit charter with a matrix that details the criteria and the evaluation scale. This matrix is especially helpful when you have multiple people working on the audit. It also helps you explain your findings to your stakeholders or clients.

**Table 1.2** provides an example of an audit criteria matrix.

*TIP*
*Save yourself a spreadsheet headache by setting up data validation for the values in your audit. Slicing and dicing the data is much easier when the values are consistent throughout the audit sheets.*

TABLE 1.2 **AUDIT CRITERIA**

| ATTRIBUTE | CELL VALUES | RESEARCH QUESTION | WHAT YOU'LL LOOK FOR |
|---|---|---|---|
| Audience | C-Level<br>Manager<br>Media<br>Unclear | Who does the content appear to be written for? | ■ Call to action (CTA) that suggests a role<br>Level of complexity<br>Nature of the content |
| Voice and tone | Yes<br>Somewhat<br>No | Does the content portray the desired voice and tone? | ■ Content that clearly embodies our defined voice and tone attributes of *x*, *x*, and *x*. |
| Clarity | Yes<br>Somewhat<br>No | Is the message conveyed clearly and effectively? | ■ Descriptive title and headings<br>Logical information hierarchy<br>Plain language<br>Persuasive CTAs |
| Readability | Yes<br>Somewhat<br>No | Does the content employ writing, style, and formatting best practices? | ■ Simple, short sentences<br>Little to no jargon<br>Headings and lists<br>Active voice |

## ANALYTICS

You can learn so much from your analytics that you may be tempted to just start mining the data and hope you find some good insights. A better approach is to decide what specific questions you want answers to first. Depending on what you want to know, you might be able to use your audit sheet to collect the data. For example, if you want to know which pages were viewed most, you can add a column for that in your spreadsheet.

Once you know the questions, record how you'll document what you learn. **Table 1.3** provides an example of research questions and documentation details.

**TIP**

*I'm not an analytics expert, but the folks at Google are. Chances are you use Google Analytics on your site, and it has a ton of resources for using its tools online.*

TABLE 1.3 **ANALYTICS RESEARCH PLAN**

| RESEARCH QUESTION | DOCUMENTATION |
|---|---|
| What do users do after visiting *<key page from which you expect the user to respond to this CTA>*? | Percentage for each path of the total paths a user takes from this page during *xx* time period |
| What are people searching for when they arrive on your site? | Top *xx* search terms monthly |
| What pages are visited most frequently, and how do people get to them? | Top *xx* pages and percentages for each path users take to get to them |

## USER TESTING

Again, before sitting down with users, specify what you want to learn and how you'll get the answers from test participants. Examples of questions for which you might want answers are

- How does the content make the user feel? For example, is he confident, at ease, overwhelmed?

- What words would the user use to describe your organization after reading your content? You want to see if these words match your brand or voice and tone attributes.
- How well does the user comprehend your content?
- Is the user likely to take the action you want them to take after reading your content?
- Can the user find key information on your website?

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**TIP**

*You don't have to do user tests with a jillion people. In fact, the law of diminishing returns suggests that you really need only five people.*

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Using your list of questions (that correlate to your hypotheses), write a user test to walk through with your five participants. I recommend trying it with a colleague or your mom first to determine how long it takes and to practice explaining the tasks.

## DON'T FORGET PEOPLE AND PROCESS

You probably think your content is a mess. You're reading or referencing this book because you want to fix it. What else do you need to know besides what specifically is wrong with your content? You need to acknowledge that your problems with content stem from problems involving people and the processes they use to do their work.

Keep in mind two important principles about people and processes. First, everyone—or almost everyone—has good intentions and is trying to do good work. The people involved in making content decisions and doing content work are doing the best they can with the skills they have and the guidance they get. Second, even the most pointless and cumbersome processes and tools were created to solve the problem at hand. The problem is they didn't evolve or they were never re-examined.

Why do I mention this? Well, mostly because I have to remind myself of those two things every time I start a new project. It's easy to mutter under my breath, "What in the world were they thinking?" or "Do they have any idea what they're doing?" But that doesn't help me or my client. Instead, I say, "Help me understand why they're doing things this way?" or "Do you feel there are gaps in the skillsets necessary to create content better?"

OK, with that out of the way, here are some of the questions you should answer at this stage of the project:

- Who is involved in efforts to create content—including subject matter experts, legal/compliance reviewers, writers, editors, publishers, and so on?
- How much time do people spend contributing to content creation or publishing that content?
- How long does it take to publish new content from ideation/request to publishing?
- How much content do you publish daily/weekly/monthly/quarterly/annually?
- How do you decide what content to publish?
- What are the pain points and roadblocks related to your content that people complain about?

You likely don't want to spend a ton of time documenting processes and roles at this point in your quest, especially if you don't have funding or the go-ahead for a content strategy project yet. Do some walkabouts, talk to people in the breakroom, buy folks coffee, and make some assumptions based on your experiences. You can validate and vet all of what you learned later. For now, you just want to describe how people and processes affect your content.

**HINT**
*For now, just try to get a handle on pain points and opportunities. I'll dig into people and process much more in Chapters 9 and 13.*

## TURN PROBLEMS INTO OPPORTUNITIES

Problems are depressing. Opportunities, you can work with. And opportunities are much easier to sell to your boss, your boss's boss, your coworkers, your clients, and even yourself. Fixing problems sounds hard. And seizing opportunities sounds like fun. Right?

This next bit of work is going to be the foundation of everything that comes next. So take some time to connect the dots between what you learned about your content and your people and processes. Then, play around with positioning so you can make a case for a content strategy project (more in Chapter 2).

**Table 1.4** is an example of how you might summarize the problems and opportunities you've discovered so far. In this format, you can set up the larger problem and related implications you uncovered during the audit, analytics review, and user testing.