

PUT IT ALL TOGETHER

I hope you're feeling good about all the work you've done so far. More importantly, I hope you feel confident that it will help you develop a solid content strategy and make meaningful recommendations.

What comes next? Now is the time to check back in with your stakeholders, especially the ones who have decision-making power or a lot of influence. (Don't forget the derailers.)

At Brain Traffic, we often prepare a Strategic Alignment Summary, which at a high level contains an overview of the following:

- The business goals the project should help the organization achieve and why
- A rundown of what you understand about users' needs
- Observations about the current content
- A recommended roadmap that outlines where to focus efforts for the rest of your project

PREPARING A STRATEGIC ALIGNMENT SUMMARY

The Strategic Alignment Summary (or any other name you want to call it) serves a couple of purposes. It helps get project stakeholders aligned on why you’re doing the project and what it will help your organization achieve. It also serves as a guidebook for project members to ensure that the resulting strategy and recommendations are addressing the right business goals, user needs, challenges, and opportunities.

Before moving on to the document, here’s a big ol’ caveat: You may not need to separate this strategic summary from your high-level strategy (which Chapter 11 discusses).

How do you know? Read through the considerations in the matrix in **Table 10.1** and circle or keep track of your answers. Then add up your points to help determine if your organization is ready.

TABLE 10.1 IS MY ORGANIZATION READY?

YES	NO	CONSIDERATION
1	0	Do you feel your stakeholders are already aligned on what challenges or problems your project should help solve?
0	1	Do you need your stakeholders to fill in some gaps in your knowledge or understanding before you can move on to specific recommendations?
0	1	Do you think filling those gaps could drastically change your current thoughts on the high-level strategy?
1	0	Will preparing and waiting for feedback on a separate document compromise your timeline?
0	1	Do you think you’ve uncovered anything in discovery that will be a big surprise to your stakeholders?

If your score is between 0 and 2, you should probably get stakeholder buy-in on the Strategic Alignment Summary before moving on to the strategy phase. If your score is between 3 and 5, you’re probably safe to combine the strategic summary with your strategy document.

OK, let’s move on to putting your discovery findings together.

ORGANIZE FOR CLARITY AND ACTION

This document's job is to clearly define what challenges or opportunities your content project addresses. It can help connect the dots between what you want to solve or take advantage of and the steps needed to do it.

One way to tell the story is to organize the document using the opportunities or challenges. I typically start with an introductory section that includes the following:

- An overview of the document purpose
- Some project context, such as what triggered it, the timeline, and what discovery activities you completed
- The current understanding of the business goals and project objectives
- A high-level summary of the challenges or opportunities
- A list of the next steps and due dates

The introductory section might look something like the sample document shown here for a membership organization that wants to attract and retain members and drive revenue through the sale of premium content.

ABOUT THIS DOCUMENT

Our approach to content strategy consists of defining a core strategy with recommendations on four key components:

- **Substance:** What kind of content do you need, and what messages does it need to communicate to your audience?
- **Structure:** How is content best prioritized, organized, and displayed?
- **Workflow:** What are the optimal processes, tools, and human resources required to support the content strategy?
- **Governance:** How are key decisions about content and content strategy made?

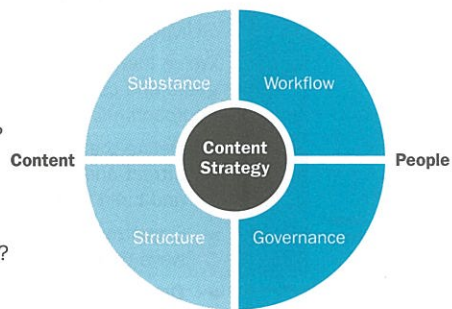
This document sets the stage for effective content strategy recommendations that will ensure your web content is useful, usable, purposeful, and profitable. Its purpose is to align your stakeholders on the following:

- Business goals and content objectives
- Challenges or opportunities your core content strategy and related recommendations must address

The information in this document was derived from the discovery phase. To arrive at our findings, we conducted stakeholder interviews and workshops, did research with users, and analyzed your current content ecosystem.

NEXT STEPS

- Provide feedback and clarification by February 7.
- Once finalized, we will begin work on the core content strategy and related recommendations.



BUSINESS GOALS AND CONTENT OBJECTIVES

Based on information during discovery, we've summarized your business goals and related content objectives as follows.

Business Goals	Content Objectives
Attract new members.	<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.
Retain new members beyond the first year.	<ul style="list-style-type: none"> – Showcase content created by members, for members. – Demonstrate how long-term members of the organization have advanced the profession.
Increase purchases of publications and training among prospective members and existing members.	<ul style="list-style-type: none"> – Drive visitors from free and member-only content to value-added paid content on the same topic. – Learn visitors' demographics, interests, and preferences to automatically serve up content they are likely to find relevant.

SUMMARY OF OPPORTUNITIES

We've identified several opportunities that will help you achieve your business goals and content objectives, touching on all four aspects of our content strategy approach.

- Define the content product to ensure what we publish and curate helps us attract and retain members by helping industry professionals excel in their jobs and build their reputations in the industry.
- Organize content to move visitors along a path from non-member to member in ways that incrementally demonstrate our value.
- Develop content guidelines and tools to help content creators, contributors, and reviewers produce on-strategy content.

Then, I'll dive into each challenge or opportunity with a short introduction. The introduction typically explains why I believe it's important, which usually is because it addresses a business goal or user need. The introduction also suggests what evidence I considered to arrive at the conclusion—was it indeed an opportunity or challenge? And, it hints at how the content strategy and related recommendations should or will help the organization address the challenge or take advantage of the opportunity.

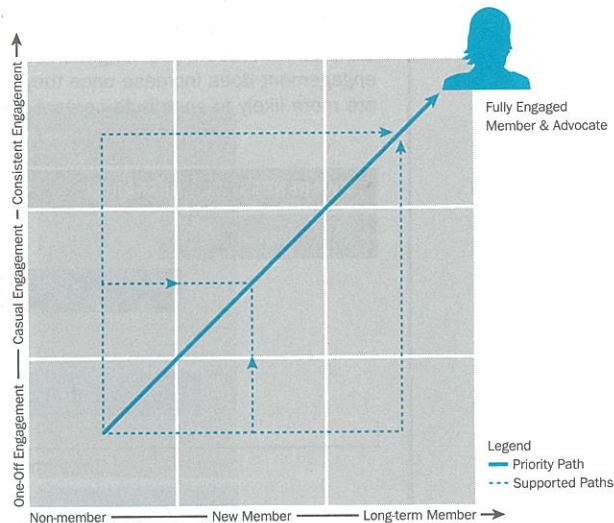
Here's an excerpt of how I might introduce an opportunity for a membership association in an actual Strategic Alignment Summary:

OPPORTUNITY

Define our content product to ensure what we publish and curate helps us attract and retain members by helping industry professionals excel in their jobs and build their reputations in the industry.

One of the biggest revenue drivers for our company is membership dues, thus making member acquisition and retention a key business goal. The primary way we provide value to members is through content that helps them excel in their jobs and build their reputations in the industry.

Based on our research with users, we're not providing or soliciting the kind of content that members and prospective members believe is helping them excel or giving them opportunities to demonstrate their expertise. Our content strategy must define what content we need to produce and curate to take advantage of opportunities to convert non-members to members and members to long-term members.



In this case, the opportunity is important because it helps them meet a business goal of increasing membership revenue. The evidence is that users don't feel the website content helps them do their jobs better or build their reputations in the industry. The content strategy must help define the right kind of content to publish and curate to attract and retain members.

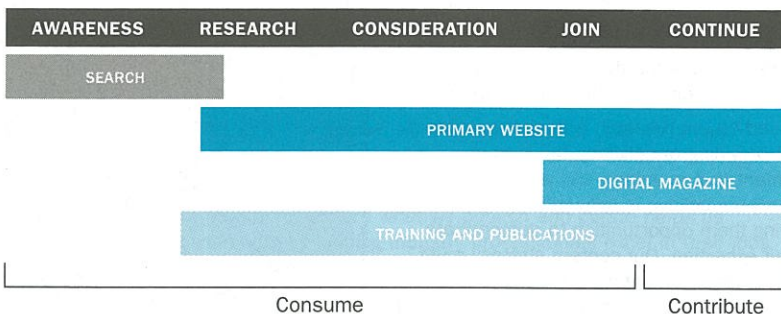
Then, I'll provide whatever evidence led me to include the challenge or opportunity, which helps stakeholders understand why it's relevant and important. The evidence helps you as you develop strategy and recommendations. You can return to this document often to make sure you've addressed the key challenges or opportunities.

Building on the example opportunity, here's what an excerpt about evidence might include:

CONTENT ENGAGEMENT

During the discovery phase, we learned that non-member users of your website typically end up at the site after doing an Internet search on a particular topic. Once there, they discover the resources available on your primary site, as well as your training opportunities and paid publications.

Most users interact with the free content without becoming a member, and there are few calls to action to do so within the content. Those who attend a training are often awarded a year-long membership with their purchase, and their content engagement does increase once they are members. Over time, long-term members are more likely to contribute content than they are to consume it.



When we layered your analytics data with the data from your website satisfaction survey, we found that approximately 45% of the people who visit your site each month are first-time visitors who are not currently members. An additional 25% are repeat visitors who have not joined the organization. The remaining 30% are visitors who visit the site more than once per month.

First-time visitors typically visit one or two pages. Repeat, non-member visitors tend to explore more content on each visit. Repeat visitors who are also members tend to view news content most frequently.

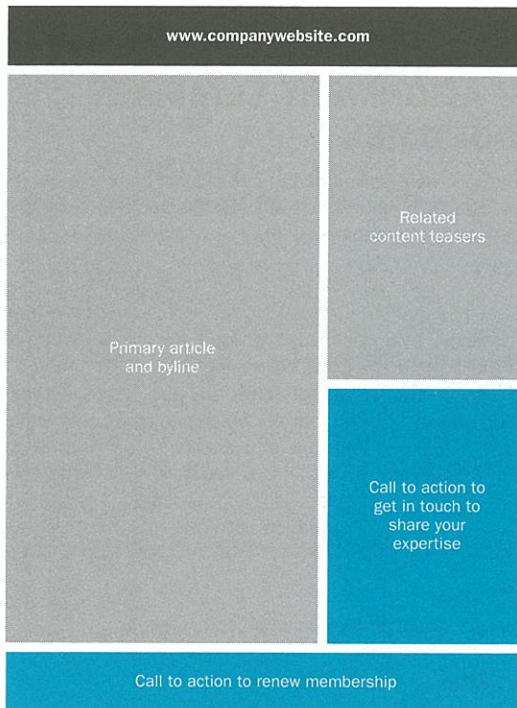


And finally, I'll provide an example of how the challenge or opportunity might be addressed in the content strategy. Sometimes this is a simple statement such as, "The content strategy and specifications will define the appropriate calls to action for non-members to explore more content or join the organization and for members to contribute content and re-up their memberships."

Other times, you might provide a little more of a taste for what the recommendations might entail. I often get a bit more explicit when clients have difficulty envisioning what content strategy recommendations include and look like.

IMPLICATIONS FOR CONTENT STRATEGY

The content strategy and specifications will define the appropriate calls to action for non-members to explore more content or join the organization and for members to contribute content and re-up their membership. In the following example, the calls to action are geared for a logged-in member whose membership will expire in the next 60 days.



ANALYZE AND SYNTHESIZE

So how do you identify the opportunities or challenges you'll include in your summary? Before you started the project, you likely had some hunches about what they were. As discussed in Chapter 1, you may have used those hunches with a small data set to get project funding.

Keep those handy. But don't get overly attached to them. I usually use one of two methods to organize my findings into challenges or opportunities. For both, grab your Discovery Insights Workbook (Content Strategy Tool 6.3) or whatever other tool you used to record your notes during the discovery phase.

The first method works best when I'm confident my hunches are accurate and I don't have much time to spend on the summary. I'll create a document listing each hunch as a heading (or you can use **Content Strategy Tool 10.1** to collect and organize your thoughts). Then, I pull out my insights spreadsheet or notebook and look for notes and data that relate to each challenge or opportunity.



CONTENT STRATEGY TOOL 10.1

STRATEGIC ALIGNMENT SUMMARY STARTER DOCUMENT

Download the starter document so you don't have to start from scratch. It contains an outline based on this chapter's discussions along with some questions and considerations to help you put your document together.

TIPS

- Avoid being wordy. Short, simple, and straightforward is better. You can always add detail if stakeholders ask for it.
- Don't feel you have to include everything you learned. Some information may not be relevant anymore, and you don't want to bog down stakeholders with unnecessary information.
- When possible, include quotes from stakeholders and users and examples from documentation or content to strengthen your narrative.

WHERE TO GET IT

Download the starter document at www.peachpit.com/register.

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

Without wordsmithing (which I find really hard), I pull in those notes and data and add a few notes about why the information is important. Try to move quickly; you can worry about sounding awesome later.

The second method works great if you have more time and want to challenge your assumptions a bit. Grab lots and lots of sticky notes. Go through your notes and write each individual important piece of data or bit of information. Then, start to group them to identify your challenges or opportunities. Sometimes I end up with a whole new set of challenges or opportunities—different from the ones I had in my head.

All right. You have your challenges and opportunities and the source content for your document. As you prepare the summary, the intent is not to just regurgitate what you learned. Instead, analyze and synthesize the information to provide your point of view about why the information matters.

For example, regurgitation might be something like:

We have 17 web properties, 3 of which we publish to regularly. The rest haven't been reviewed in a year or more.

Instead, add some context about the information's importance:

We have 17 web properties, 3 of which we publish to regularly. The rest haven't been reviewed in a year or more. User research suggests that our audiences don't know where to go for what information. Our target audience is most likely to go to www.siteexample.com, but that's a site we haven't been maintaining. The information is out of date, and the messaging doesn't represent our brand very well.

At this stage, not making formal recommendations can be tricky, although you provide hints. Specific strategy recommendations are risky because your stakeholders need to get onboard with your findings first. That's why this interim step is so important in cases where you need to ensure that stakeholders are aligned before moving forward.

I think you're ready to go. Download Content Strategy Tool 10.1, and get started!

**TIP**

Never deliver a Strategic Alignment Summary by itself without a conversation. Get people on the phone or in a room and walk through it. I usually won't even send it in advance unless my client feels super strongly about getting it first.

GETTING TO THE STRATEGY PART

OK, you have the document, and it's fabulous. Now, you want to strategically share it to get alignment and proceed.

I like to start with an informal presentation to my key stakeholder. The benefit is that she can call out any major red flags or areas where the language needs a little softening. And she's likely the one who's on the hook for a successful project.

After I make any necessary revisions, I prepare an executive summary presentation for the more strategic stakeholders. Although I prefer to deliver that presentation myself, sometimes I prepare a presentation for my client to deliver.

Make sure you put this presentation in a business-focused context: goals and results versus process. Pull out the key items they will be most interested in, and highlight how they affect the bottom line. Expect a lot of discussion. A lot. Expect disagreement.

Your role is to listen and answer questions about your conclusions. You may hear comments that change your mind, in which case you can update the document (and your thinking). You may hear conversations that suggest the organization isn't quite ready to change the way it does things or put a new stake in the ground. That's OK.

It's not a failure to have to make some changes based on new information or a realization that you have more work to do to get aligned. I've facilitated meetings where I told clients that I don't think they should proceed just yet.

And then there are the meetings where productive discussions lead to a shared vision for the project. Then, it's time to talk with the people who will be doing the work.

Whenever possible, I also ask to present to the implementers and influencers. They need to understand the vision agreed upon by their leaders and to get a chance to react and provide feedback. You may tailor your presentation slightly to address this audience. The conversations you'll hear will probably be mostly tactical. Let them happen; more than likely you'll get good insights that will inform your strategy.

DISCOVERY: THAT'S A WRAP

OK. So you have alignment on the project vision. It's time to get to work on the strategy. Keep your Strategic Alignment Summary handy to remind you, your stakeholders, and your team why you're doing this project and how it should help your organization and your users.

Next up, creating a content compass or core strategic statement that helps you provide the right content, to the right people, at the right time, and for the right reasons. You know all that stuff now. So this will be fun.