CHAPTER 14

CREATE ON-STRATEGY CONTENT

It's time. You're ready. Let's get set up to create the content that will help you achieve your strategy. Everyone who works on content in your organization or client's organization will be thankful for the work you've done so far and the work you're about to do. I promise.

This chapter is split into two parts. In the first, I talk about some best practices for content processes and roles. In the second, I walk through tools and guidelines you can provide to the people who create, review, and publish content.

ROLES, RESPONSIBILITIES, AND PROCESS

Chapter 9 talked about how to uncover and document problems with processes and roles. Now is your chance to improve those processes to make content efforts more efficient and effective.

Before you go too far down the path of process and role definition, you need to determine your content management model:

- A **centralized** model typically means that all content production and publishing is managed by one department or team. The central team—which includes job titles like writer and editor—creates, edits, and publishes all content with input from subject matter experts (SMEs) and other reviewers (such as legal and brand).
- With a **decentralized** model, teams throughout the organization are charged with creating, editing, and publishing their own content. These teams may or may not include members with specific content-creation expertise or experience.
- A **hybrid** model combines aspects of centralized and decentralized models. For example, each team throughout the organization may be responsible for creating and publishing their own content, but a central team edits all content before it is published. Or, a central team may be responsible for all marketing content, while decentralized product teams own support content.

Decentralized models pose more risks to keeping your content consistent and on-strategy, whereas centralized ones allow you to run a tighter content ship. Which model is right for your organization depends on several factors, including the usability of your CMS, resource availability, team member skillsets, content volume, and timelines.

Whatever you decide or do (whether you get a say or not), everyone working on content must know what's expected from them and when it's expected.

ROLES AND RESPONSIBILITIES

You need a certain base set of content roles and responsibilities to create content that helps you achieve your content strategy. (These roles are focused on written content, but you can apply them to visual content, such as videos and infographics, as well.)

Keep in mind that roles do not necessarily equal job titles. Instead, they refer to a set of responsibilities that you must account for in your content creation process.

The responsibilities within the set may be distributed among various job titles or even completed by outside resources, such as freelance or contract writers. Similarly, one job title may have responsibilities that span the roles outlined here. **Content Strategy Tool 14.1** is a sample role and responsibility matrix you can use to document what teams and people are responsible for content tasks.

HINT
The roles and responsibilities in this chapter are focused on content creation, approval, and publishing. Chapter 15 talks about roles and responsibilities for content planning and maintenance.

EDITOR

The editor is ultimately accountable for the strategic and brand integrity of the content. Depending on your site and content management model, you may have one or more editors. Common responsibilities include:

- Assigning content creation work to writers
- Reviewing content and providing feedback to ensure that it is on-strategy and on-brand
- Creating and communicating editorial standards for content creation
- Ensuring that all people working on content have the tools necessary to create on-strategy and on-brand content
- Bringing in and managing outside resources to work on content when needed

CONTENT STRATEGY TOOL 14.1

ROLES AND RESPONSIBILITIES MATRIX

Download the roles and responsibilities matrix template to document content tasks and who is accountable for them.

TIPS

- You can distribute responsibilities under each role among multiple job titles.
- One job title can be responsible for tasks that span roles.
- You can't expect people to be accountable unless they know what is expected of them—communication is key.

WHERE TO GET IT

Download the templates at www.peachpit.com/register.

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

OWNER

The content owner is the person responsible for ensuring that specific content is accurate and updated. Regardless of your content management model, owners typically work throughout the organization. For example, on a corporate website, the director of HR may be the owner of the Career section. Responsibilities related to content creation might include:

- Identifying SMEs and source content for writers
- Reviewing content from the perspective of the owner's business area
- Serving as the primary contact for content-related questions that come up during the creation process

WRITER

The writer creates content based on the strategy and requirements outlined by your content design. Responsibilities include:

- If necessary, defining content specifications or outlines for the content to be written
- Assessing available source content to determine if there's enough information to write the content
- Doing additional research, such as conducting SME interviews, to gain an understanding of the subject matter
- Drafting content for review by SMEs, editor(s), and other reviewers
- Making changes based on reviewer feedback
- Submitting content for publishing

SME

Subject matter experts are pretty self-explanatory, I suppose. They are the people in the organization who are knowledgeable about your content topics (products, services, business function, industry information, trends, and so on). Their responsibilities include:

- Participating in interviews with content creators to provide expertise and knowledge
- Reviewing content for accuracy and providing feedback

REVIEWER

Reviewer is a blanket term for anyone besides SMEs and the editors who need to review content before it goes live. Common examples are people from legal/compliance and brand management. Like SMEs, a reviewer's responsibilities include:

- Participating in interviews with content creators to provide expertise and knowledge
- Reviewing content and providing feedback to ensure that it complies with internal guidelines or regulations

PROOFER

The proofer, also known as a copyeditor, reviews content for grammar, typos, formatting, and so on. Because of the nature of those changes, a proofer typically makes the changes without oversight from the writer, SME, or editor.

PUBLISHER

The publisher is responsible for pushing the content live to whatever property you'll display it in (website, social channel, mobile app, and so on). Common responsibilities include:

- Entering content into the CMS or ensuring it was entered correctly and that all required information (such as metadata and taxonomy terms) is included
- Publishing content to staging (where it can be previewed before going live) and ensuring that it is behaving correctly
- Pushing content live and making sure it appears correctly

> **TIP**
> *In lots of organizations, people are asked to take on content responsibilities that aren't officially part of their jobs. That's when content work gets pushed to the bottom of the list. Advocate to get this work added to job descriptions so they have permission to prioritize it.*

PROCESS

Now, let's define the optimal process for your organization to create and publish on-strategy content. The steps in the process emerge pretty clearly when you document the roles and responsibilities.

In the high-level workflow diagram on the next page, the dark blue boxes represent steps that may not be necessary. For example, the writer may not need to create a page outline, or changes may not be needed to publish content.

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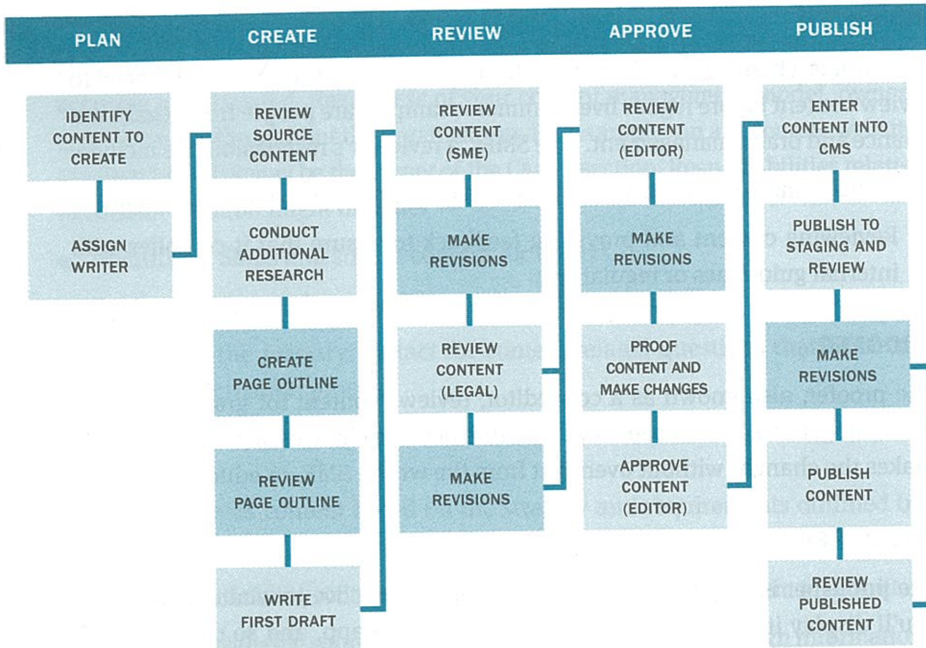


Once you define the steps necessary, you can add some detail. When I provide workflow recommendations for my clients, I am sure to cover, in some fashion, the following information:

- **What** each step is (covered in the diagram) and what happens before and after it. For example, "Proof editor-reviewed and revised content before it is submitted for publishing."
- **Why** the step is important to the process to ensure that you communicate its objective and that you don't over-engineer your process.
- **Who** is completing the tasks associated with each step and who is informed or consulted (if applicable).
- **When** the task will be completed, which can refer to the order in which steps occur and how long they take to complete.
- **How** the task will be completed, which refers to the technology used, such as whether content will be drafted in a Word document or within the CMS. It also refers to the tools and guidelines used to complete the task (which are up next in this chapter).

You can communicate this information as part of the workflow diagram, similar to how Chapter 9 documented the workflow. Or, you can include it as narrative that accompanies the workflow diagram. And really, you don't need a diagram at all if you'd rather just write out the steps and tasks. The example in **Table 14.1** takes the second step from the diagram (Create) and adds detail about each of the tasks (represented by the boxes in the diagram).

TABLE 14.1 **EXAMPLE PROCESS DOCUMENTATION**

	STEP 2: CREATE		
TASK	Review Source Content	Conduct Additional Research	Write First Draft
WHO	Writer reviews source content and consults with content owner if gaps are found.	Writer interviews SMEs suggested by content owner and/or reviews publications or other documentation for additional details.	Writer creates draft for review by the SME.
WHY	Ensure writer has the information necessary to create accurate content.	Fill gaps in existing source content.	Provide a draft for SMEs to review and validate.
WHEN	Within three business days of receiving assignment	Within one week of receiving assignment	Within two weeks of receiving assignment
HOW	Content owner provides source content via email.	Writer interviews SMEs using the interview guide template and refers to the trusted sources list for additional research.	Writer references the voice and tone guidelines, content specifications, and personas.

What matters is that the workflow is communicated to everyone involved with content (and their bosses), the expectations are clear, and the documentation is complete.

CONTENT CREATION TOOLS

Everyone working on content in your organization (including outside resources you bring in) should know what your content strategy is and understand how it affects content. Make sure you provide the content team with tools and guidelines that help them create, review, and approve on-strategy content.

I like to assemble these tools and guidelines into a content playbook. Most often, I have three tools I like to provide my clients. This, of course, is not an exhaustive list. To decide what kinds of tools you need, assess team member familiarity with the editorial process and writing best practices, the complexity of your content, the use of outside resources, and your content management model.

CONTENT PRODUCTION INVENTORY

The content production inventory is really just your content inventory repurposed to track content creation from assignment to publishing. If you can create this in a shareable and editable format, your teams can update it as they go and you'll always know your content's status.

I typically include columns for the page ID, page name, batch number (if you're breaking the work into chunks), content owner, writer, SME(s), current status, and next step. It looks something like this:

ID	PAGE NAME	BATCH	OWNER	WRITER	SME	STATUS	NEXT STEP
1.0	What's Content Strategy?	1	Meghan Casey	Amy Little	Kristina Halvorson	Reviewed by SME	2nd Draft due 8/1
2.0	Our Services	2	Meghan Casey	Amy Little	Kristina Halvorson	Draft delivered to SME on 7/15	SME review due 8/1

Sometimes I'll add in due date and completion columns. It really depends on how much detail is necessary to keep the process moving.

STYLE GUIDE

A style guide documents how you want to talk to your audience, as well as any specific guidelines you want your writers to follow. My base style-guide outline usually includes a summary of the desired voice and tone, content examples that reflect the desired voice and tone in various circumstances, a review of web writing best practices, and any deviations from the chosen style manual (for example, *The Yahoo! Style Guide*, *The Associated Press Stylebook*, or *The Chicago Manual of Style*).

If the organization hasn't already defined the desired voice and tone, I use a card-sorting exercise I learned from Margot Bloomstein, principal of Appropriate, Inc., in her book *Content Strategy at Work: Real-World Stories to Strengthen Every Interactive Project*. I've summarized how I've adapted it here:

1 Prepare a deck of index cards with a wide variety of adjectives on them.

Margot starts with a deck of 150. I usually narrow it down to 50 or so, making sure to include some words that could be considered synonyms. **Content Strategy Tool 14.2** contains Margot's official instructions as well as the list of words she typically uses in a format you can print and cut into cards.

CONTENT STRATEGY TOOL 14.2

CARD-SORTING EXERCISE INSTRUCTIONS AND CARDS

Review the instructions for facilitating a card-sorting exercise, and download the cards in a format you can print and cut.

TIPS

- You can handwrite the cards (assuming people can read your writing).
- Whenever possible, do this exercise in person—the insights from the discussion are as informative as the resulting list of adjectives, and sometimes more so.
- I included this exercise here because it relates to the style guide. You can also use it early in your content strategy project as a discovery exercise.
- In a pinch, you can have people do this exercise individually using an online application, such as Optimal Sort, or even a Word document. If you do, follow up with people individually to understand nuances.

WHERE TO GET IT

Download the templates at www.peachpit.com/register.

WHERE IT CAME FROM

Margot Bloomstein, principal, Appropriate, Inc. (www.appropriateinc.com)

2. Gather a group of stakeholders around a large table, and ask them to sort the cards into four categories, which you've labeled on cards as well:
   - We are currently perceived this way and want to be.
   - We are not currently perceived this way and want to be.
   - We are not currently perceived this way and don't want to be.
   - We are currently perceived this way and don't want to be.
3. As the participants go through this exercise, listening for and noting the strength of reactions, the intensity of the agreements or disagreements, the nuances between terms, and so on.

   For example, in a recent card-sorting session, my clients felt strongly about two terms that many of us would say were synonyms. They wanted to be perceived as *innovative* but not as *bleeding edge*. Through their discussion, we uncovered a very important nuance between the terms.

   Conversely, they also wanted to be perceived as two words that were technically antonyms. Again, through their discussion, we were able to understand the balance in perception they wanted to see between the words *strategic* and *tactical*.
4. Gather the cards from the "don't want to be" piles, and bundle them into the groupings for later review.

   Be sure you document which adjectives were included. How they don't want to be perceived is just as important as how they do.
5. Gather the cards from the "want to be" piles, and ask the stakeholders to work together to group them into five or six categories.

   Again, listen to the discussion about why certain cards belong together.
6. Ask them to pick one adjective that best represents each group, or choose a different word altogether to represent the group.
7. Ask them to prioritize the groups.
8. Ask if the priorities shift based on their audiences or user groups, and make notes about that discussion.

Add this data to everything else you know about the organization and its content goals to define the voice and tone. Communicate it to people working on content. You can present the information in a straight-up list. Or you can do something like what fellow content strategist Cameron Siewert, owner of Contenterie, does with a fancy pie chart. She calls it a voice and tone algorithm.

TIP
For an amazing resource on writing for the web (or just plain writing), including best practices and advice, pick up a copy of Nicely Said: Writing for the Web with Style and Purpose, *by Nicole Fenton and Kate Kiefer Lee. You can thank me later.*

INNOVATIVE

We offer specialized solutions that adapt to your needs, backed by the technological advancements we make first.

STRAIGHTFORWARD

We communicate clearly, even when the message is complicated.

RELIABLE

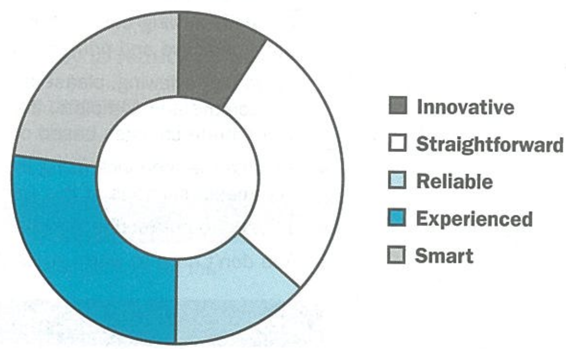
We don't jump onto the latest trends, unless we set them. Our approach is rooted in deep research and strong, proven processes.

EXPERIENCED

We've been doing this a long time, and we've always done it well.

SMART

We are your trusted resource for industry knowledge and trends, whether you're a client, prospect, or casual visitor.



FEEDBACK FORMS AND CHECKLISTS

If you've ever written content for review by others, you've likely gotten feedback that wasn't quite what you were looking for. That's happened to me, usually because I wasn't very clear about what kind of feedback I needed.

For example, each reviewer in our process is reviewing for specific things. The SME's job is to make sure the content is accurate. The legal reviewer is supposed to make sure the content won't get the company in trouble with the law. And the editor is responsible for ensuring that the content is on-strategy, adheres to the defined voice and tone, and conforms to web writing best practices.

Although the editor is usually familiar with the ins and outs of the editorial process, SMEs and legal reviewers likely aren't. So letting them know precisely what you want them to look for is important. One way to do that, in addition to providing clear instructions, is to have them fill out a feedback form and answer specific questions.

Here's an example of what a feedback form might look like for SMEs reviewing product content:

REVIEWER INSTRUCTIONS

- Before reviewing the content itself, please take a moment to read the page objective and primary use cases the content is meant to address.
- As you're reviewing, please make notes about whether the information is accurate and complete. It's not necessary to edit the content. We'll incorporate changes based on your feedback as appropriate in the next draft.
- Provide the feedback using the comment functionality in Word or in the comments sections of this form.
- Please do not modify the text in the Word document.
- You don't have to worry about grammar or typos; the proofer will take care of that.

QUESTION	YES	NO
Does the content accurately reflect the features and benefits of the product?		
Comments:		

QUESTION	YES	NO
Is any important information missing?		
Comments:		

Checklists are another helpful way to ensure that all content is good to go before publishing. For decentralized editors for whom editing is an added task in which they don't have training or expertise, a checklist to remind them what to look for can make the work much easier. For proofers, I provide a checklist of the most common usage, formatting, and punctuation errors to make sure each piece of content is reviewed for them. And finally, for publishers, a quick list of items to check before hitting "publish" can be an effective way to reduce re-work.

Here's an example checklist for an editor who is responsible for making sure content is on-strategy:

X	REVIEW ATTRIBUTES
	The content supports our strategy to <*do this*> for <*these people*> so that <*this happens*>.
	The content demonstrates one or more proof points from our messaging framework.
	The content addresses users' likely tasks or information.
	It is clear what action(s) the user can or should take next.
	The call to action is prominent and appropriate.

READY. SET. WRITE.

You've set up the people working on content for success. Now they can confidently create, review, approve, and publish the content that will help the organization achieve its business goals. You deserve a pat on the back. Or a bourbon. Or both.

Celebrate. For sure. But don't get too comfy. The next—and last—chapter talks about what comes next for your content. You need to maintain what you have, plan what you'll need next, and govern it all for the foreseeable future.