



LIST OF TOOLS

This appendix lists the tools from the chapters with explanations related to how they apply to that chapter's tasks. You can find them easily because the pages containing tools will be visible when you flip through the book. Or, you can use this appendix to find out which tools are in each chapter, what page they appear on, and a review of how you can use the tools.

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 ContentStrategyTools.zip file that contains all the tools.



CHAPTER 1

1.1 AUDIT SPREADSHEET

page 8

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).

1.2 A SUPER SIMPLE USER TEST

page 9

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.

CHAPTER 2

2.1 MAKING THE CASE PRESENTATION STARTER DECK

page 20

Use the presentation outline deck to provide some inspiration and get you started. It follows the Toumlin's Model of Argumentation and contains some example content to illustrate it.

CHAPTER 3

3.1 STAKEHOLDER MATRIX

page 31

Download the stakeholder matrix to list and label your stakeholders, record how you'd like to get information from them, and make notes about topics, concerns, and your pitch. The last page is a table where you can record stakeholder interview times and key takeaways from your discussions.

3.2 COMMUNICATIONS MANAGEMENT PLAN

page 35

Download the Communications Management Plan to help you think through how to keep your stakeholders in the loop. The plan contains a lot of information, some of it similar to what's in this chapter and some is different. Use the pieces from both that make sense for you.

CHAPTER 4

4.1 OBJECTIVE ALIGNMENT SESSION PLAN

page 41

Download the example agenda and plan to kick-start your preparation. Included in the plan are exercise instructions and visuals and a template for the Individual Exercise worksheet.

4.2 PROJECT KICK-OFF EMAIL

page 43

Kick off your project by getting stakeholders excited about the work and letting them know what to expect. Download the example email as a starting point.





CHAPTER 5

5.1 PROJECT PREPARATION CHECKLIST

page 48

Download the sample checklist to help you think through important considerations and track your progress on project preparation tasks.

5.2 PROJECT MANAGEMENT PLAN

page 50

Download the project management plan template, and complete it for your project. As always, tweak it to meet your needs. It doesn't contain everything I've noted you could include, so add or delete anything that makes sense for your project.

5.3 DETAILED TIMELINE

page 57

Keep your project on track, and communicate milestones with your team. Download the template and follow the instructions to create your own timeline.

CHAPTER 6

6.1 THE BUSINESS MODEL CANVAS

page 67

Download The Business Model Canvas to start pulling together information about how your company makes and spends money.

6.2 STAKEHOLDER INTERVIEW GUIDE

page 73

Prepare for successful stakeholder interviews by thinking through your questions in advance. Download the interview guide as a starting point for creating your own.

6.3 DISCOVERY INSIGHTS WORKBOOK

page 77

Download the Discovery Insights Workbook, which contains an inventory sheet and an insights sheet, to set yourself up for a successful documentation review.

CHAPTER 7

7.1 USER UNDERSTANDING MATRIX

page 83

Download the matrix and use it to record your user research questions and rationale for answering them so you can start a conversation with your stakeholders.

7.2 USER RESEARCH WORKSHOP ACTIVITIES

page 90

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

CHAPTER 8



8.1 CONTENT LANDSCAPE LIST

page 97

Download the spreadsheet to keep your list of relevant web properties and other content channels.

8.2 SAMPLE USER TESTS

page 108

Download the sample user tests for descriptions of tests (and instructions) you can use to get user insights about your content.



CHAPTER 9

9.1 JOB TIME WORKSHEET

page 114

Download the worksheet to collect information about how people working on content spend their time.

9.2 PLANNING AND PROCESS WORKSHOP ACTIVITIES

page 117

Download the workshop activity details to get specific instructions and templates for conducting the workshop exercises described in this chapter.

CHAPTER 10

10.1 STRATEGIC ALIGNMENT SUMMARY STARTER DOCUMENT

page 128

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.



CHAPTER 11

11.1 CORE STRATEGY STATEMENT MAD LIB

page 142

Download the document to get a printable worksheet version for in-person sessions and a fillable Mad Lib version you can email to your stakeholders.

11.2 MESSAGING FRAMEWORK TEMPLATE

page 146

Download the template for an editable, visual version of the Messaging Framework like the one shown in this chapter.

CHAPTER 12

12.1 DATA SETS YOU FREE PRESENTATION

page 150

Download the presentation for an abundance of information, tips, and additional resources.

12.2 HEURISTICS FRAMEWORK CHEAT SHEET

page 151

Download the framework for a cheat sheet on heuristic assessments.

12.3 CONTENT SCORECARD REPORT SAMPLE

page 157

Download the sample for ideas on how to put together your own content measurement report.



CHAPTER 13

13.1 CONTENT PRIORITIZATION TEMPLATES

page 163

Download the templates to think through and communicate content priorities to your team.

13.2 CORE MODEL INSTRUCTIONS AND WORKSHEETS

page 172

Review the workshop instructions and download the worksheets to facilitate a core model workshop on your project.

13.3 CONTENT MODEL SPREADSHEET

page 179

Download the template to make your list of content components and assemble them into pages or views.

13.4 CONTENT OVERLAY AND PAGE TABLE TEMPLATES

page 181

Download the templates to get started with content specifications. Pick and choose components to assemble the right tool for your project.

CHAPTER 14

14.1 ROLES AND RESPONSIBILITIES MATRIX

page 189

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

14.2 CARD-SORTING EXERCISE INSTRUCTIONS AND CARDS

page 195

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

CHAPTER 15



15.1 CONTENT STRATEGY SKILLSETS

page 204

Download the table of skillsets to review and make sure you have the necessary roles and responsibilities covered.

15.2 EDITORIAL CALENDAR TEMPLATES

page 214

Download the collection of templates to find one that works for you (or will work with some modifications).