# GOVERN, PLAN, AND MAINTAIN YOUR CONTENT

So here's the thing about content. You can't just set it and forget it. And you certainly can't let anyone in the organization publish anything they want whenever they want. Yet that's exactly what happens with lots of websites or other digital properties.

Organizations don't do it on purpose (usually). They don't have time. Or they haven't put anyone in charge. Why? Probably because they didn't think about it before they launched or redesigned their site. This chapter covers how to avoid this pitfall and make sure your content—as awesome as it will be when you launch—stays on-strategy, up to date, and relevant over time.

THE CONTENT LIFECYCLE

It's helpful to think of content in terms of a lifecycle (cue Elton John... "Circle of Life"). The lifecycle diagram shown here—based on one developed by fellow content strategist Erin Scime—depicts the stages of the ideal lifecycle.
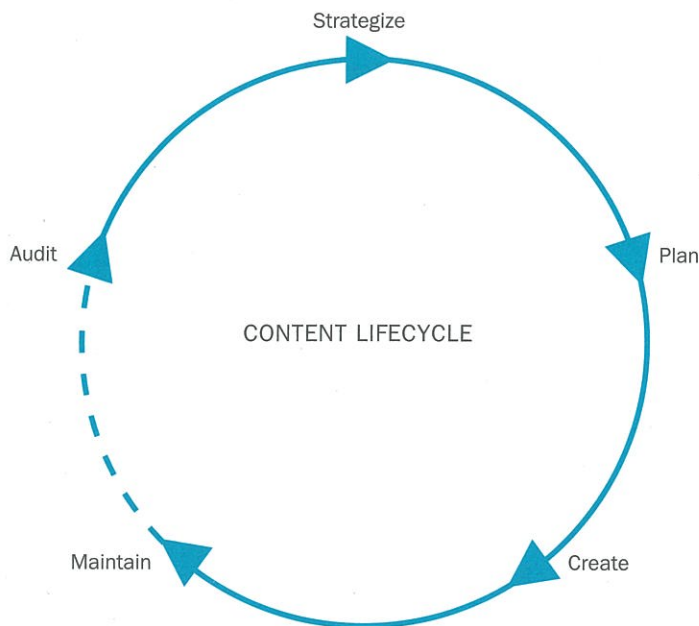
- **Strategize**—You've done that part already! This is where you define what content you need, for what people, and for what reasons, and where you specify how it will be organized and viewed.

- **Plan**—You did this in the last chapter when you documented roles, responsibilities, and processes.

- **Create**—You did this, too, in the last chapter, by setting up the tools that will help people create, approve, and publish content.

- **Maintain**—Most content, even the stuff that seldom changes, needs to be reviewed and updated (or deleted) at least annually. Some content requires more frequent upkeep to remain timely and relevant.

- **Audit**—I expand *audit* to mean assessment. I talked a lot about measuring how your content is performing.

You'll note that this is a continual cycle. Reassessing your strategy regularly is important, especially as your business model or priorities change, new competitors come on the scene, or your target audience shifts. When any of these happen, you can use what you learned from this book to do your discovery and adjust your strategy.

The concept that sits in the middle of all this work is governance. So let's dig into some of the key components of governance: assigning authority, maintaining current content, and planning for new content.

AUTHORITY

When no one is truly empowered to enforce content standards or say no to off-strategy ideas, you have a problem with authority. And without it, your strategy will collapse. Every. Single. Time. Because there will always be bright, shiny ideas that sound really awesome but don't help you achieve user goals or serve users' needs.

At least a couple of types of authority come into play: strategic and implementation. Each is important and needs to have "yes or no" authority and have that decision stand. If they don't, you end up with problems like these:

- A crowded homepage cluttered with all the content that everyone thought was the most important yet provides no value to the audience

- Entire sections of content that no one ever visits

- Scads of expensive one-off microsites that business partners created to circumvent authority

- Eleven versions of the same information spread across those expensive microsites

- A staff of smart folks who wonder why they even bother

Strategic authority is given to the person who is ultimately responsible for achieving the content strategy and demonstrating its success. This person needs the authority to tell even the CMO "no" if she comes to the table with a cool idea with no ROI.

Implementation authority refers to the more day-to-day content responsibilities, such as managing the homepage editorial calendar, triaging requests for unplanned content updates, coordinating the maintenance process, and providing editorial oversight. This person needs the authority to tell people like product managers that their request to take over the whole homepage for their product launch is not possible because an equal priority is promoting the company's flagship event.

Each type of authority has associated responsibilities, similar to what Chapter 9 outlined. Keep in mind that roles and responsibilities don't always correspond to a specific job title. In addition to what I've outlined here, take a look at **Content Strategy Tool 15.1**. It's a table of content strategy skillsets you can use to assemble your job descriptions; it was created by Melissa Breker, co-founder of Content Strategy Inc.

CONTENT STRATEGY TOOL 15.1

CONTENT STRATEGY SKILLSETS

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

TIPS

- Use the skillset table as a checklist to ensure you have skills represented across your team or organization. Rarely will one person be skilled at everything.
- Expand the table to use across all digital disciplines.

WHERE TO GET IT

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

WHERE IT CAME FROM

Melissa Breker, co-founder of Content Strategy Inc. (www.contentstrategyinc.com)

STRATEGIC AUTHORITY ROLES AND RESPONSIBILITIES

I recommend one person be in charge of the strategic responsibilities, even if some of the tasks are delegated. Some common titles for people with strategic responsibilities include Director of Digital Experience, Director of Content Strategy, Web Editor in Chief, and Director of Interactive Marketing. You'll note that words like *director* and *chief* appear in all these examples. Titles carry meaning, and someone at a director level is more likely to be perceived as authoritative.

Now for a sample of this person's responsibilities:

▣ Leads efforts to evaluate and evolve the content strategy as business goals and priorities change

▣ Prepares the budget for annual content efforts

▣ Determines the staff resources necessary to achieve the strategy

▣ Manages the process of creating and aligning on the content road map and communicates decisions to business partners

▣ Ensures that content tools, standards, and guidelines are in place to support content creators, reviewers, and publishers

▣ Defines content success metrics, ensures that content effectiveness is measured, and proposes content-improvement projects based on measurement efforts

▣ Serves as the content advocate and liaison in discussions about web operations, interactive marketing, technology enhancements, and so on

IMPLEMENTATION AUTHORITY ROLES AND RESPONSIBILITIES

The implementation roles and responsibilities are likely to be spread across multiple people or job titles. Chapter 9 discussed that these tasks could be centralized on a content team or decentralized throughout the organization. Whenever possible, assign related tasks or sets of tasks to the same person.

Examples of implementation authority responsibilities include:

▣ Manages content requests from business partners and communicates decisions

▣ Schedules and facilitates day-to-day content creation, review, and publishing

▣ Reviews content before publishing and provides feedback to content creators

▣ Mentors business partners on content best-practices guidelines

▣ Develops and maintains editorial calendars for the homepage and other prime-content real estate

▣ Manages the content-maintenance process and trains business partners to audit their own content

MAINTENANCE

Before your content launches, have a plan in place for how you'll maintain it. Maintenance activities are divided into two categories: planned and unplanned.

PLANNED MAINTENANCE

Planned maintenance will make up the bulk of your maintenance efforts now that you have your content strategy in place. It refers to the regular assessments you'll do on your content as part of your measurement plan and to the regular content reviews for accuracy and web writing best practices.

At a minimum, review each piece of content once a year. You can review everything at once or conduct rolling audits in which a portion of the content is reviewed every month or quarter.

When you're reviewing content as part of your measurement plan, you're looking for whether it supports the strategy, is appropriate for the audience, communicates key messages, uses clear calls to action, and employs a voice and tone that reflect the brand. This review is often best done by an outside resource who can take a fresh look.

At the same time, however, have the content owner, SME, and other reviewers (remember them from Chapter 9?) make sure the content is still accurate and compliant with legal and regulatory rules. This very important task is a lot to ask of them, so make it as easy as possible.

Provide reviewers with an inventory of the content that each should review. If you included columns for content owners and SMEs in your inventory, that should be pretty easy. Give clear instructions about what you want feedback on, similar to the checklists and feedback forms in Chapter 9.

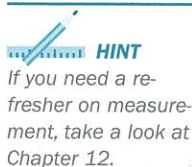**Table 15.1** outlines what a planned maintenance process might look like.

HINT
If you need a refresher on measurement, take a look at Chapter 12.

TABLE 15.1 **EXAMPLE PROCESS DOCUMENTATION**

STEP	DESCRIPTION	WHO
1	Set maintenance schedule.	Web Manager
2	Prepare process tools: ■ Content inventories ■ Assessment criteria ■ Reviewer instructions	Web Manager
3	Hold reviewer briefing and training.	Web Manager, Content Owners, SMEs, Legal Reviewers
4	Complete review and record data in the content inventory.	Content Owners, SMEs, Legal Reviewers
5	Consolidate inventories and prepare a project plan to make the updates.	Web Manager
6	Approve the project plan.	Director of Content Strategy
7	Assign resources.	Web Manager
8	Make updates in the staging environment.	Writer, Publisher
9	Review and approve updates.	Editor, Content Owners
10	Publish updates.	Publisher

UNPLANNED MAINTENANCE

You can't avoid unplanned maintenance altogether. But having a plan to maintain content certainly helps. In the cases where an update just can't wait, like when a product or service is discontinued, an executive resigns, or a regulation about what you can and can't say changes, you need a process in place to accommodate those changes.

I've seen all kinds of processes for doing this—from sending email messages to the web team to creating a Lotus Notes database to submit and manage requests. I prefer a system that is more easily tracked than a straight-up email. But that system can be as simple as a Google form in which people tell you the location of what needs to be changed and what the specific change needs to be.

UNPLANNED CONTENT UPDATE REQUEST

Use this form to send content change requests to the web team.

What content needs to be updated?

List the URL or breadcrumb.

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[                      ]
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Describe the requested change.

Include details like paragraph 2, second sentence.

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[                      ]
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Does the change require legal or compliance review before publishing?

○ Yes

○ No

○ I'm not sure

Do you want to approve the change in staging before publishing?

○ Yes

○ No

Why is this change necessary?

○ Legal or compliance requirement.

○ Information is no longer accurate.

○ Customer support suggested the change.

○ Other: [   ]

How would you prioritize the change?

○ It's business critical and urgent.

○ It's business critical but not urgent.

○ It's not business critical.

From there, the web manager or editor (or whoever is playing the implementation authority role) can determine whether the change needs editorial review and how to prioritize it against other work in the queue. To help with prioritization, I suggest that the requester rate the request on a scale from 1 to 3: 1 is business critical, urgent; 2 is business critical, not urgent; and 3 is not business critical (and therefore not urgent). Then rate each request from 1 (low) to 3 (high) for the amount of effort needed to make the change. Add up the points, and do the ones with the lowest score first. Math!

PLANNING

Just like authority and maintenance, planning breaks down into two types or categories: content product and editorial. I guess that's the trend in this chapter.

Overall, *content product planning* is the more strategic stuff, such as the content projects you're going to do this year to enhance the user experience, build the brand, or improve content that's not working. *Editorial planning* is focused on where and how you will talk about product promotions, events, thought capital (position statements, blog posts, and so on), and so on.

Content product planning informs editorial planning. For example, going way back to the pediatric dentist example, you may decide during content product planning to create a series of video tutorials about how to teach children to brush their teeth at various ages. That's a strategic content decision. But then, you need to decide how you will promote or feature those videos on your website and in social media. Make sense?

CONTENT PRODUCT PLANNING

As I said, this is more of a strategic planning effort. As such, it needs to involve people in more strategic positions. So gather them up. You'll want to bring in people from marketing, product development, business intelligence, customer insights, creative, user experience, technology, and so on.

I recommend you bring this group together at least twice a year to revisit your content strategy. Once you've reviewed the strategy and what you've been doing related to content, take a long pause. And then ask, "Has anything changed?"

If the changes render your strategy no longer relevant, your next step will be to go back to discovery to fill in gaps in knowledge and adjust your strategy.

TIP

Let business partners know the status of their requests, which is when a database that handles that kind of thing for you comes in handy. But you can send individual emails, too, if the volume of requests is pretty low.

If the business environment is largely the same, make a plan for what content work to do next.

You'll need to generate a list of possible projects, which shouldn't be too hard. People always have ideas. You can have stakeholders submit those ideas ahead of time via something like a content brief, or they can present them to the group in your planning meeting.

The next step is to evaluate the ideas. Chapter 11 went through a similar exercise when you said yes or no to a list of projects using the core strategy statement as the litmus test. You'll do much the same thing here, but with a little more rigor.

1 Ask people to present only ideas that they believe pass the core strategy statement litmus test.

2 Make sure everyone understands each idea before moving on to the next. Have someone summarize each idea on a sticky note.

3 Ask the group to work together to evaluate the ideas.

   I like to do this with a scoring system or a quadrant. Let's assume you go the quadrant route.

4 Draw a quadrant on the board or show one on the screen.

5 Label one axis with **Business Impact** and the other with **User Need**. If you want, you can also add the level of priority for each quadrant, as shown below. Or you can just talk about how the level of priority corresponds with each quadrant.

   If this sounds familiar, it's because you did almost the same thing to prioritize content in Chapter 13.
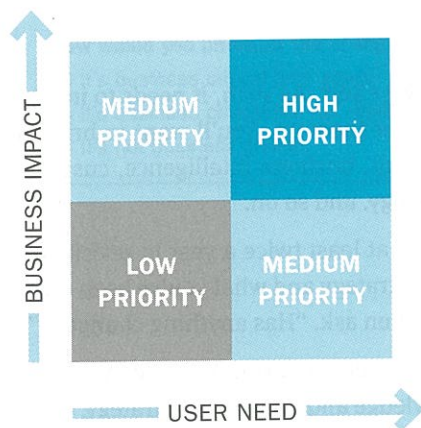
Have stakeholders work together, with as much discussion as they need, to place each idea on the quadrant. Listen for disagreement and facilitate conversations to reach alignment. Make sure everyone feels comfortable with the result.

6 Set aside anything from the lower-left quadrant. In fact, just throw those away.

7 Draw another quadrant with the labels **Value** and **Effort**. Note that the priority labels are slightly different here because of the axis for effort.

8 Take the ideas from the high business value/high user need quadrant and put them in one of the top quadrants, depending on their level of effort.

9 Take the ones that were either high business impact/low use need or low business impact/high user need and map those according to effort in the bottom two quadrants.
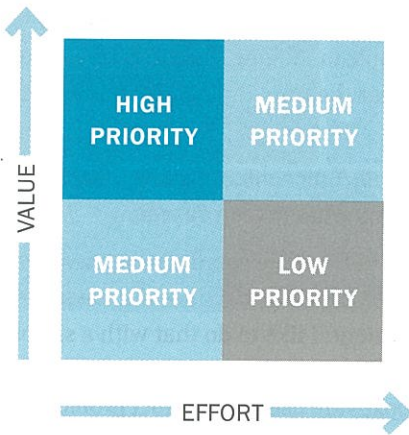
Now you'll draw on the board or project a calendar for the planning timeframe.

10 Plotting ideas on the calendar, put sticky notes for planned maintenance work in the appropriate places to ensure that those efforts are considered.

11 Plot the prioritized ideas on the calendar in this order:

- High value/low effort
- High value/high effort
- Low value/low effort
- Low value/high effort

You'll probably run out of time in the calendar by the time you get to the forth bullet, maybe even the third one. Save those ideas for the next planning session.

The hard part is finished. You have alignment on the content efforts to pursue. Time to make a plan and execute like you know you can.

EDITORIAL PLANNING

Editorial planning helps you publish or share content at the right times for the right people. Think about it the same way you might think about an editorial calendar for a fashion magazine. They create and publish content based on the time of year or season, projected trends, timely topics, and so on. Your organization likely does the same.

Having a calendar that's thought out in advance is beneficial for a couple of reasons: It provides content creators with advance notice of what needs to be produced and published, and it gives the people managing the calendar backup when they need to tell a business partner that the unplanned editorial request can't be accommodated.

Here, you're going to focus on the calendar itself. Your content strategy, marketing plan, and other inputs will help you determine what to feature when.

Let's say you want to create a calendar to ensure you are coordinating messages and featured content throughout your website. The first step is to document the places where your site can feature timely content. I like to do that with a simple wireframe that includes specifications for each available area. In the homepage example shown on the next page, the blue boxes are used for product promotions, thought capital content, and so on.

Next, you'll want to create a calendar of some kind that includes all the available placements and what's going in each one when. You probably need to track other information, such as who is creating the content and when it's due. I recommend doing that in a separate sheet so the calendar view is clean and clear. The next page shows an example of what a calendar might look like for the homepage. And **Content Strategy Tool 15.2** is a collection of editorial calendar templates developed for real clients.

HOME PAGE

HERO IMAGE AND TEASER TEXT
- Appropriate for brand messaging and product promotions
- Rotates monthly

VALUE PROPOSITIONS

PRODUCTS AND SERVICES

PRODUCT PROMOTION
- Appropriate for brand product giveaway or discount
- Rotates monthly

FEATURED THOUGHT CAPITAL
- Appropriate for blog posts, position papers, executive commentary
- Rotates weekly

HOME PAGE		MONTH			
LOCATION	CONTENT	WEEK 1	WEEK 2	WEEK 3	WEEK 4
Hero	Children's Dental Health Month message	■	■	■	■
Featured Product	Kid's Sonic Toothbrush promotion	■	■	■	■
Featured Thought Capital	"Teaching Toddlers to Brush" video	■			
	"Telling Your Kids What to Expect at the Dentist" blog post		■		
	"Getting Your Grade Schooler to Floss" video			■	
	"Does Your Baby Need a Dentist?" blog post				■

CONTENT STRATEGY TOOL 15.2
EDITORIAL CALENDAR TEMPLATES

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

TIPS

- Define the purpose of your calendar before picking a template. The kind of template you need depends on what you want to document or communicate.

- You may need multiple calendars to track multiple items. The nut has yet to be cracked on a do-it-all editorial calendar solution.

- Not finding what you need? Head to the Internet, where templates are available through Google docs and where several blog posts round up templates from the web.

WHERE TO GET IT

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

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

FAREWELL, CONTENT COMRADE

You have come to the end—which, as we both know, is just the beginning. My hope is that you've found a handbook that helped you navigate the project at hand, helped you plan for one that's coming up, or gave you the confidence to propose content strategy to a client or your boss.

Even better if the book and the online toolkit are resources you come back to again and again. Who knows—maybe you'll write the next book or develop an indispensable tool that we content comrades can't live without.

Good luck!