UNDERSTAND YOUR BUSINESS ENVIRONMENT

In a recent client stakeholder interview, I asked the question "How do you decide what products to offer?" There was a long pause. And then she asked me, "Why do you need to know that if you're just helping us with our content?"

She wasn't being defensive, nor was she upset about the question. She was just genuinely confused about why I would care. Many people who create content or build the experiences in which content is the central focus don't ask such questions, which is part of the reason our websites, applications, and so on are in such rough shape.

To make strategic recommendations about content, you need to understand the business. If you don't, you're more likely to recommend solutions that don't help the company achieve its business goals.

I'm not saying you need to run out and get MBAs (although you certainly could). I am saying you need to understand (among other things) how companies or clients make and spend money; who they are trying to reach with their product, services, or offerings; what requirements or constraints guide their operations; how they are perceived in the marketplace; how they are different or better than their competitors; and what outside influences have an effect on their business decisions.

This chapter and the next three are all about learning what you can about the business, users, content, and people and processes. Then, Chapter 10 talks about how to pull all that information together in a document that sets the stage for your recommendations.

DEFINE THE INQUEST

So yeah, it's a little bit like an inquest or investigation. And that sounds pretty complex and complicated and tedious. It can be. If you're on the inside, however, you're already well-informed, but you need to validate and fill gaps in knowledge. If you're a consultant coming in, your learning curve is probably steeper. Either way, what fun!

I separate what I want to learn about the business into two categories: internal factors and external factors. You don't have to think of it that way, but that's how this next bit is organized. Another useful model I've found is The Business Model Canvas from Strategyzer (formerly the Business Model Generation)—see the **Content Strategy Tool 6.1** for more details.

INTERNAL FACTORS

Internal factors are what a business can realistically control. The business's decisions and actions may be influenced by something outside its control, but it ultimately has a choice in how to respond to those outside influences.

I organize internal factors into four groups: offerings, customers, revenue, and expenditures. You might think about these factors differently, and that's OK. The point is to make sure you gather enough information about the business to feel confident in your content strategy recommendations.

CONTENT STRATEGY TOOL 6.1

THE BUSINESS MODEL CANVAS

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

TIPS

- Print it on 8.5 x 11 paper, and start jotting down the information you know or think you know so you can validate it in interviews, working sessions, and so on.

- Make the template canvas your own by including additional or different information that makes sense for your project.

- Pass it around to your team and other stakeholders to fill out, and then analyze whether everyone has the same understanding of your business model.

WHERE TO GET IT

Download the canvas at www.peachpit.com/register, or download it directly from strategyzer.com.

WHERE IT CAME FROM

Strategyzer (strategyzer.com)

Put on for board for discussion

OFFERINGS

The Offerings category refers to the products, services, or other commodity (such as news for a media outlet) the company or organization offers to its customers or clients. To clarify, customers or clients include people who receive offerings at no cost or a reduced cost from a nonprofit or government organization.

- What products, services, or other commodities do you offer?

- What's the history behind each offering (for example, how long has it been available, why did you choose to offer it)?

- What is the offering lifecycle like (for example, how long is an offering available, what determines whether to continue it)?

- What need in the marketplace do your offerings fill?

- How would you describe the value proposition for each of your offerings?

- How often do you create new offerings?

- How do you decide what new offerings to provide?

- What's the typical time to market (for example, how long does it take for an idea to become an offering) for your offerings?
- What goals have you set around your offerings for the next year?

CUSTOMERS

The Customers category includes people who currently use the products, services, and other commodities you offer <u>and people who you'd like to use your offerings</u>. Customers fall under internal and external factors (more later). As an internal factor, this is about who the company and organization has chosen as their target customer.

- How do you describe your target customer?
- What segments (which are typically based on demographics or other data, such as income level, geography, gender, education, dollars spent, frequency of using your service, ethnicity) do your customers fall into?
- How big are your current and prospective customer bases?
- How would you prioritize your customer segments?
- What customer problems do your offerings solve?
- How do you interact with and provide information to your current and prospective customers?
- What goals have you set for customer acquisition and retention for the next year?

REVENUE

For businesses and some nonprofit organizations, revenue comes from selling their offerings. Other nonprofits and organizations get revenue through donations, grants, association fees (which usually come with some offerings), and so on.

- How do you sell your offerings (direct to consumer, business to business, and so on)?
- Through what channels do you sell your offerings (point of purchase or service, online, telemarketing, and so on)?
- In what markets do you sell your offerings and how do you prioritize them?

(handwritten note in margin: So not about companies' bottom line or profit per say)

- If you sell through multiple channels, which are the most successful and which are your priority (for example, do you attract more visitors to your website versus a social media account, or is your target audience more likely to use your mobile app versus your .com site)?

- How do you prepare sales staff, associates, and so on to talk about your products?

- Do you get any post-sale revenue (royalties, service contracts, and so on)?

- What is the sales cycle like for your offerings (for example, how long does it typically take and what steps are involved from lead to sale)?

- What do you know about why—or why not—prospective customers choose your offerings?

- What ratio of leads converts to a sale?

- What are your revenue goals in each channel for the next year?

EXPENDITURES

You gotta spend money to make money. Or so the saying goes. That's what I'm talking about here—what investments does a company make or what costs does it incur to support selling its offerings (or to support getting funding to offer them)?

- What investments in technology, including your website, do you have planned?

- How do you make decisions about technology investments or enhancements, such as switching platforms or content management systems?

- Do you want the content strategy recommendations to fit within any technology restraints, or are you open to recommendations that might require a change in technology?

- How are sales professionals compensated?

- What are your expenditures for providing customer support (for example, do you use a call center vendor; do you maintain a knowledge center)?

- On average, how much do you spend on each customer to get the sale and provide support?

- Have you set any business goals related to expenditures for the next year?

EXTERNAL FACTORS

External factors affect the business in ways that are, for the most part, out of its control. In some cases, businesses or organizations influence these factors, just as these factors influence the business. I put them in four categories: competitors; legal, compliance, and regulations; trends and current events; and customers.

COMPETITORS

A company or organization has competitors whether they think so or not. I've had some clients tell me they are the only ones who do what they do, so they have no competition. The truth is that even if your company is truly the only one in its class, they are still competing—with companies who do similar things or for a spot at the top of a customer's go-to source of information on *topic x*.

- Who do you see as your direct competitors for your products and services?
- How are your direct competitors better or different than you?
- Why do you think your prospective customers choose your competitors over you?
- Who is seen as an expert source of information about your industry and offerings?

LEGAL, COMPLIANCE, AND REGULATIONS

Most companies have to follow some rules about what they can and cannot say or about what they must provide to customers. Learn about these rules up front to avoid serious problems down the line. And building a relationship with the internal legal and compliance folks early in your project is really helpful—you're gonna need them later.

- What are the high-level rules about what you can and cannot say in your content?
- What accessibility, readability, or other online standards must you adhere to?
- What government laws or regulations affect what you offer and how you talk about it?
- What's the process for making sure your content is compliant with any legal or regulatory requirements?
- Are laws or policies being discussed currently by lawmakers or government agencies that could affect your current or future content?
- What trademarks, service marks, copyrights, and so on do you have, and are there guidelines for referencing them in your content?

TRENDS AND CURRENT EVENTS

Trends refer to external factors such as technological advancements, global markets, and new occurrences that affect what you offer and why people need it. A good example is that increases in digital hacking have led to the need for more secure data servers. Current events are, well, current events, such as natural disasters and elections, that affect customers' attitudes and behaviors.

- What's going on in the industry that does affect or might affect your business?

- What changes in the business environment are you aware of that might affect what you offer or how you position what you offer?

- In what ways have current events, such as natural disasters, elections, celebrity news, high-profile crimes, and so on, affected your business in the past?

- What's your process for updating positioning, content, and so on if a trend or current event necessitates it?

CUSTOMERS

When you think about customers as an internal factor, you're talking about what the company or organization knows or believes about its target customer. Sometimes, that's all you'll have to go on. But if you're able, you can validate the information with user research about users' actual attitudes and behaviors. Those are the external factors that affect your project. You'll learn more about user research in Chapter 7.

- How do your prospective customers shop for or make decisions about your products and services?

- What or who influences your prospective customers' decisions about the products and services you offer?

- What do your prospective and current customers care most about in the products or services you offer?

- How do your prospective and current customers want to interact with you?

- What kind of content do your prospective and current customers expect from you?

- What is a typical customer lifecycle like?

GET THE GOODS

OK, you know what information you want to learn and understand. Now what? The two main ways to get the information you need are stakeholder interviews and documentation review.

INTERVIEWING STAKEHOLDERS

Use your stakeholder matrix and start setting up one-hour meetings with each of your stakeholders. You may be tempted to interview some people in groups to save time. I usually recommend against it because you may not get the most straightforward answers. Use your best judgment. You can always follow up with people later if you think they held back.

PLANNING THE INTERVIEWS

If you filled out your stakeholder matrix, you've made some good notes concerning what topics to talk about with each stakeholder. With that as a reference, send each stakeholder an email detailing what you hope to learn (at a high level) and what they should do to prepare (which is usually nothing).

> **TIP**
>
> *The only preparation I ever ask stakeholders to do is to make a list of any documentation they think I'd find helpful. And I never send full interview questions in advance. I don't want them to just fill them out like a survey, and I don't want them to come with canned responses.*

The stakeholder matrix is also a great starting point for putting together a stakeholder discussion guide or checklist. I usually create a master interview guide with all the questions on all the topics and then chop it up for each stakeholder, depending on what makes the most sense to ask them. **Content Strategy Tool 6.2** is an example discussion guide from Kim Goodwin, author of *Designing for the Digital Age*.

Before you jump in, consider how you want to structure the interview. The order in which you ask your questions can make a huge difference.

CONTENT STRATEGY TOOL 6.2
STAKEHOLDER INTERVIEW GUIDE

Download the interview guide as a starting point for creating your own.

TIPS

- Create a master stakeholder guide to ensure you've got all the topics and questions covered. Then, break it up for each stakeholder or groups of similar stakeholders.

- Include the goals of the interviews on all versions as a reminder for yourself and as talking points when you kick off each interview.

- Make it your own by breaking it into topics or sections, adding or subtracting questions, making notes that prompt you, or including the details about each interviewee (whatever you need for it to be useful).

WHERE TO GET IT

Download the interview guide at www.peachpit.com/register.

WHERE IT CAME FROM

Kim Goodwin, *Designing for the Digital Age*

STRUCTURING THE INTERVIEW

In its facilitation course Technology of Participation (ToP)® Facilitation Methods, the Institute of Cultural Affairs recommends an approach known as the *focused conversation*. The approach helps people facilitate group conversations.

I've also found the approach helpful in planning stakeholder interviews. It's made up of four types of questions: objective, reflective, interpretive, and decisional. The first three apply more directly to stakeholder interviews. I won't cover the decisional type.

OBJECTIVE QUESTIONS

Objective questions are about getting out the facts and warming people up. They should be questions that are pretty easy to answer. Examples include:

- What's your role at *company*?

- What do you know about this project?

- What are your team's top goals and objectives for this year?

REFLECTIVE QUESTIONS

Reflective questions are meant to elicit a more personal or emotional response from the stakeholder. They add meaning and context to the facts. Examples include:

- What's the hardest part of your job?
- What is the most important thing this project can do related to your work and the work of your team?
- What do you like and dislike about the content on the current website?

INTERPRETIVE QUESTIONS

Interpretive questions get at the stakeholder's view of issues outside their role or team, such as the company at large, the industry, or the customers. Examples include:

- What do you think your customers expect from your website?
- What will this project being successful mean for the company?
- What do you think will be the biggest challenges for the company related to this project?

CONDUCTING THE INTERVIEWS

I won't spend a ton of time here, but there are a few items I keep in mind or do as part of the stakeholder interview process.

First, really focus on listening. Avoid trying to fill silences. Avoid jumping in with your own insight because you think it will make you sound smart. (I do that. Don't do that.) And avoid scurrying past a topic because it at first seems the stakeholder doesn't have much to say. Let the interviewee think.

Second, whenever possible, have someone along who can take fairly verbatim notes for you. That's not to say you shouldn't take any of your own notes. I almost always do. But I can keep the interviewee very focused, knowing that I'll have a record of what was said if I need it.

Third, spend some time figuring out a note-taking system that works for you. I still handwrite my notes, unless I have a note-taker with me. I feel there's less of a barrier between me and the person I'm interviewing when I'm not typing on a laptop. I also have a set of symbols I use to denote the key things I'm writing down so that I can easily pick out key information and follow up if necessary.

*	Super important insight or aha	?	Need to learn more about this
!	Surprising comment	☐	Mentioned documentation I should review
☺	Mentioned someone I should talk to		

And finally, pay close attention when stakeholders mention an item you have not heard of before. You'll notice in my interview note symbols that three of them hint at information I didn't know I needed to know. I'll often hear a name mentioned repeatedly, and I immediately think *hidden stakeholder*! Or someone mentions a project that I don't think my client has any idea is happening and has a direct impact on the work I'm doing. And sometimes, someone will mention something like the 2015 digital roadmap that I have not seen or heard about.

REVIEWING DOCUMENTATION

Reviewing documentation, such as strategy presentations, site analytics data, creative briefs, organizational charts, brand guidelines, or user research reports, often can seem pretty aimless. Following the two-step process I've outlined can help add some structure and order to your documentation review. **Content Strategy Tool 6.3** is a spreadsheet you can use to inventory the documents and record your findings.

INVENTORY THE DOCUMENTS

I usually start by making a list of the documents I've received from my client and categorizing them by type. The types may vary by project, but usually include these standard ones:

- **Strategy**—Often these are presentations that outline what the company or a department within the company is trying to achieve and the actions or projects it's pursuing to do so.

- **User information**—This includes items such as user or market research reports, usability testing data, personas, and customer demographic information.

- **Analytics**—Mostly, analytics relate to conversion rates, site visits, pageviews, user paths on a website or application, and so on. Additional examples include call center data and data around cost per sale.

- **People and process**—Documents I might review in this category include organizational charts and process maps for content planning, sourcing, creating, and publishing.

With those categories in mind, I have a better idea of what kind of information I can expect to glean from each document. It's also a good way to validate with your client or business partner that you have all the relevant information; seeing the spreadsheet might spark additional ideas for things you should review.

REVIEW AND RECORD

You can really do this process any way that works for you, such as creating printouts and highlighting key information. Maybe even color code your highlights. A method I've started using is one I learned from my former colleague Emily Schmittler.

I create a spreadsheet with the following columns:

- **Insight**—What did I learn that was important?
- **Topic**—What is the note about? (I tend to use the categories of information described in the "Define the Inquest" section of this chapter.)
- **Source**—What document did I get this insight from in the inventory?
- **Source category**—What category (strategy, user information, analytics, people, and process) is the source document from?

Then, I start going through my documents, usually a category at a time, and record my insights as I go. I like this approach for a few reasons.

First, I don't have to go back to a stack of scribbled, highlighted papers to find that one bit of information I think I remember seeing. Second, I can share this document in a way that's easy for others working on the project to understand. And third, if I make an assertion in a deliverable and my client asks me where I got that information, I can find it on my spreadsheet.

TIP

You can use the same spreadsheet for interview notes, especially if you're going to type them anyway. Your source is just the person you talked with. If you do, include another column for Source Type so you can easily separate interviews from documents if you need to.

Trust me, this spreadsheet is going to come in super handy when you're putting all your insights together at the end of the discovery phase. You'll be able to filter your insights to discover patterns. It'll be awesome.

CONTENT STRATEGY TOOL 6.3
DISCOVERY INSIGHTS WORKBOOK

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

TIPS

- You can set up whatever topics you want. And you may want to have two topic columns in cases where you need a subtopic for better classification.

- Write in a professional manner so you can share the document with your client if needed or even lift notes verbatim for your deliverables.

- Make sure you call the source documents what your clients call them or refer to them by file-name to avoid confusion regarding the source of an insight.
- Record insights from interviews in the spread-sheet, too.

WHERE TO GET IT

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

WHERE IT CAME FROM

Meghan Casey, Brain Traffic (www.braintraffic.com)

OPEN FOR BUSINESS

Wow. You've learned a lot about the business. So much your head is probably exploding. Do what you need to do to get your brain in gear for the next part of your discovery process. Sometimes, I need to walk away for a day. Sometimes, I need to immediately type up all my notes so I feel completely immersed. It's up to you.

Next, you'll find ways to learn all about the people who use the content you're strategizing about. That includes digging deeper into the insights your stake-holders already have and validating (or invalidating) what they think they know.