THE
CONTENT STRATEGY
TOOLKIT

Methods, Guidelines, and Templates for
GETTING CONTENT RIGHT

MEGHAN CASEY

Foreword by Kristina Halvorson, author of Content Strategy for the Web
In memory of my parents, Barbara Hanson and Jack Casey, who raised me to find passion and inspiration in what I do... so that I might write a friggin’ book and dedicate it to them.
CONTENTS AT A GLANCE

Acknowledgments .................................................. xvii
About the Author .................................................. xix
In Praise of *The Content Strategy Toolkit* ...................... xx
Foreword. .......................................................... xxii
Introduction ....................................................... xxiv

I GET BUDGET AND BUY-IN

1 IDENTIFY PROBLEMS AND OPPORTUNITIES 5
2 CONVINCE LEADERS AND GET THE RESOURCES 15

II SET UP FOR SUCCESS

3 GET STAKEHOLDERS ON BOARD 27
4 SET AND ALIGN ON PROJECT OBJECTIVES 37
5 RUN THE PROJECT 47

III DIG IN AND GET THE DIRT

6 UNDERSTAND YOUR BUSINESS ENVIRONMENT 65
7 LEARN ABOUT YOUR AUDIENCE AND USERS 79
8 GET FAMILIAR WITH YOUR CONTENT 93
9 REVIEW HOW WORK GETS PLANNED AND DONE 109
10 PUT IT ALL TOGETHER 121
IV ▶ ARTICULATE YOUR STRATEGY

11 CREATE A CONTENT COMPASS 135
12 DECIDE HOW YOU’LL MEASURE SUCCESS 147
13 DESIGN YOUR CONTENT 159

V ▶ PUT YOUR STRATEGY INTO ACTION

14 CREATE ON-STRATEGY CONTENT 187
15 GOVERN, PLAN, AND MAINTAIN YOUR CONTENT 201

Appendix: List of Tools ......................................... 215
Index .......................................................... 225
TABLE OF CONTENTS

Acknowledgments ............................................. xvii
About the Author ............................................. xix
In Praise of The Content Strategy Toolkit .................. xx
Foreword ........................................................... xxii
Introduction ....................................................... xxiv

I  GET BUDGET AND BUY-IN

1  IDENTIFY PROBLEMS AND OPPORTUNITIES  5

Figure Out What’s Wrong with Your Content ................ 6
  Hypothesize What’s Wrong ................................ 6
  Choose Your Methods ...................................... 7
Content Strategy Tool 1.1
Audit Spreadsheet ............................................ 8
Content Strategy Tool 1.2
A Super Simple User Test ................................... 9
  Set Up Your Experiments ................................. 10
  Don’t Forget People and Process ....................... 12
  Turn Problems into Opportunities ..................... 13
  Ready? Let’s Go ........................................... 14
2 CONVINCE LEADERS AND GET THE RESOURCES  15

Think Like a Business Person. ................................. 16
Quantify the (Missed) Opportunities............................ 16
  Calculate the Risks ........................................... 18
  Consider Non-monetary Costs. .................................. 19
Make Your Argument................................................. 19

Content Strategy Tool 2.1
Making the Case Presentation Starter Deck.................... 20

Claim .......................................................... 21
Grounds ....................................................... 21
Warrant ......................................................... 21
Backing ......................................................... 21
Qualifier ....................................................... 22
Rebuttal ......................................................... 22
The Ask ......................................................... 22
Ready for Action? .................................................. 23
II SET UP FOR SUCCESS

3 GET STAKEHOLDERS ON BOARD

Stakeholder Roles and Types ......................................... 28
Roles ................................................................. 28
Types ............................................................... 29
Your Stakeholders .................................................... 30
List and Label ...................................................... 30
Content Strategy Tool 3.1
Stakeholder Matrix ................................................... 31
Craft Your Approach ................................................ 31
Keeping Stakeholders in the Loop .................................. 34
All Aboard ........................................................ 34
Content Strategy Tool 3.2
Communications Management Plan .............................. 35

4 SET AND ALIGN ON PROJECT OBJECTIVES

Set the Table .......................................................... 38
The People ............................................................ 38
The Plan ............................................................... 39
Content Strategy Tool 4.1
Objective Alignment Session Plan ................................. 41
The Partners ......................................................... 41
Kick Off for Clarity .......................................... 42
Group Decision Making ...................................... 42
Content Strategy Tool 4.2 Project Kick-Off Email ...................... 43
Ground Rules. .................................................. 44
Facilitative Listening ......................................... 45
Understanding Consensus. ...................................... 46
Aligned and Ready. ........................................... 46

5 RUN THE PROJECT ........................................... 47

Content Strategy Tool 5.1
Project Preparation Checklist .................................... 48
Preparing .......................................................... 48
Set Up the Project ............................................... 48
Content Strategy Tool 5.2
Project Management Plan ....................................... 50
Get Everyone on the Same Page .............................. 50
Planning .......................................................... 54
Timelines .......................................................... 54
Content Strategy Tool 5.3
Detailed Timeline ................................................ 57
Budget ............................................................ 57
Doing ............................................................. 58
III DIG IN AND GET THE DIRT

6 UNDERSTAND YOUR BUSINESS ENVIRONMENT 65

Define the Inquest ................................................................ 66
Internal Factors .................................................................. 66
Content Strategy Tool 6.1
The Business Model Canvas .............................................. 67
External Factors .................................................................. 70
Get the Goods .................................................................. 72
Interviewing Stakeholders. ................................................ 72
Planning the Interviews ..................................................... 72
Content Strategy Tool 6.2
Stakeholder Interview Guide .............................................. 73
Structuring the Interview ................................................... 73
Conducting the Interviews .................................................. 74
Reviewing Documentation .................................................. 75
Content Strategy Tool 6.3
Discovery Insights Workbook ............................................. 77
Open for Business ............................................................. 77
7  LEARN ABOUT YOUR AUDIENCE AND USERS  79

What You Want to Know and Understand ............................ 80
Market Research vs. User Research .................................. 80
Questions and Gaps ...................................................... 82
Content Strategy Tool 7.1
User Understanding Matrix .......................................... 83
Your Approach to User Research .................................... 84
Assessing Appetite ....................................................... 84
Proposing an Approach ................................................ 85
Doing the Research ..................................................... 86
Content Strategy Tool 7.2
User Research Workshop Activities ................................. 90
Nice to Know You, Users ............................................... 91

8  GET FAMILIAR WITH YOUR CONTENT  93

The Content Landscape .................................................. 94
Make a List ........................................................................ 94
Document the Details ..................................................... 96
Content Strategy Tool 8.1
Content Landscape List ................................................... 97
Visualize the Ecosystem .................................................. 98
Content Snapshots ........................................................ 99
Inventories ....................................................................... 101
Content Audits .............................................................. 103
IV ARTICULATE YOUR STRATEGY

11 CREATE A CONTENT COMPASS 135

Project Types ............................................. 136
Function .................................................... 136
Property .................................................... 137
Subset ....................................................... 138
Core Strategy Statement ................................. 138
What Does a Core Strategy Statement Look Like? ........... 139
How Do You Craft a Core Strategy Statement? ............... 141
Content Strategy Tool 11.1
Core Strategy Statement Mad Lib .......................... 142
Messaging Framework ...................................... 143
What Does a Messaging Framework Look Like? ............... 143
How Do You Develop a Messaging Framework? ............... 145
Content Strategy Tool 11.2
Messaging Framework Template .......................... 146
Show the Way ............................................... 146
12 DECIDE HOW YOU’LL MEASURE SUCCESS 147

Deciding What to Measure ........................................ 148
Defining Some Terms .............................................. 148
Choosing Your Metrics ............................................ 149
Content Strategy Tool 12.1
Data Sets You Free Presentation ............................... 150
Content Strategy Tool 12.2
Heuristics Framework Cheat Sheet ............................... 151
Putting It All Together ............................................. 155
Measuring Content Effectiveness ................................. 156
Document How Content Is Performing .......................... 156
Report to Stakeholders ............................................. 156
Content Strategy Tool 12.3
Content Scorecard Report Sample ............................... 157
Putting Your Measurements to Use ............................. 158

13 DESIGN YOUR CONTENT 159

What I Mean by Content Design ................................... 160
Prioritization .......................................................... 161
Content Strategy Tool 13.1
Content Prioritization Templates ................................. 163
Organization .......................................................... 164
Sitemaps ............................................................... 164
Taxonomy ............................................................... 167
Presentation .............................................. 169

The Core Model ......................................... 170

Content Strategy Tool 13.2
Core Model Instructions and Worksheets .................. 172

Content Models ......................................... 176

Content Strategy Tool 13.3
Content Model Spreadsheet .............................. 179

Specifications ............................................. 180

Content Strategy Tool 13.4
Content Overlay and Page Table Templates ................. 181

The Best-Laid Plans ........................................ 183

V  ► PUT YOUR STRATEGY INTO ACTION

14 CREATE ON-STRATEGY CONTENT 187

Roles, Responsibilities, and Process ....................... 188

Roles and Responsibilities. .............................. 188

Content Strategy Tool 14.1
Roles and Responsibilities Matrix ......................... 189

Process .................................................... 191

Content Creation Tools ................................... 194

Content Production Inventory ............................ 194

Style Guide ................................................. 194

Content Strategy Tool 14.2
Card-Sorting Exercise Instructions and Cards ............. 195
Feedback Forms and Checklists ........................................ 197
Ready. Set. Write................................................................ 199

15 GOVERN, PLAN, AND MAINTAIN YOUR CONTENT 201
The Content Lifecycle ................................................... 202
Authority.................................................................... 203
  Content Strategy Tool 15.1
  Content Strategy Skillsets ........................................ 204
Strategic Authority Roles and Responsibilities ................. 204
Implementation Authority Roles and Responsibilities ....... 205
Maintenance................................................................. 206
  Planned Maintenance ............................................... 206
  Unplanned Maintenance ........................................... 207
Planning.................................................................. 209
  Content Product Planning ....................................... 209
  Editorial Planning .................................................. 212
  Content Strategy Tool 15.2
  Editorial Calendar Templates .................................... 214
Farewell, Content Comrade ............................................ 214

Appendix: List of Tools ............................................... 215
Index....................................................................... 225
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I seriously can’t believe I’m writing acknowledgments for a book. That I wrote.

So I guess I should start with the person who told me I could, in fact, write a book. Thank you, Kristina Halvorson, for believing in me so much that you let me write this sucker on Brain Traffic time. And for coming into my office once every couple of weeks to tell me that I was going to be famous.

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And last, but not least, thanks to the entire team at Peachpit. Extra especially, my deepest thanks to my absolutely amazing acquisitions editor, Nancy Peterson, and development editor, Robyn Thomas. Working with you made this process easy (I can say that now) and fun.
Meghan Casey was one of the first content strategists at Brain Traffic, the world’s leading agency devoted exclusively to content. She helps a wide variety of clients—startups, nonprofits, colleges and universities, Fortune 50 companies, and everything in between—solve the messy content problems most organizations encounter every day. She has also helped The Nerdery, a software development shop in Minneapolis, build content strategy into their User Experience practice.

A regular trainer and speaker on content strategy topics, she once inspired participants to spontaneously do the wave in a workshop setting. Yep, that really happened. Meghan has been working with content and communications since 1996, after receiving her bachelor of arts degree in writing from Concordia College. She also holds a master of arts in nonprofit management from Hamline University.
IN PRAISE OF THE CONTENT STRATEGY TOOLKIT

“Ever wondered what to include in your content audit? Struggled to sell your boss on content strategy? This book is for you. Packed with activities, diagrams, and sample documents, The Content Strategy Toolkit is a supremely practical guide you’ll turn to again and again. Best of all, Meghan Casey doesn’t just explain the tools—she helps you figure out which ones you need, when.”

—Sara Wachter-Boettcher, content strategy consultant and author of Content Everywhere

“This book is a must read for people who truly value customer experience. Organizations can’t say they have consumer-centric sites without having a firm handle on their content and the tasks their users are trying to complete. The practical advice you’ll gain will help you ensure your site has a solid foundation.”

—Jane Keairns, Assistant Director of Digital Strategy—Corporate Marketing, Principal Financial Group

“Quality content increases value. Poor-quality content destroys value. It’s as simple as that. Meghan’s book has specific, practical, and immediately actionable ideas that will help you increase the quality of your content.”

—Gerry McGovern, CEO, Customer Carewords

“Practical, relevant, and realistic: Those are the qualities that describe content strategy, and those are the qualities Meghan Casey brings to every chapter in this book. We’ve long suffered projects that are the stuff of fantasy and lofty castles in the sky. Content strategy puts a foundation under those fantasies so you can communicate consistently, effectively, and sustainably. Arm yourself with this book and gain tools, techniques, and tips to bring to every project.”

—Margot Bloomstein, author of Content Strategy at Work: Real-world Stories to Strengthen Every Interactive Project and Principal at Appropriate, Inc.
“The Content Strategy Toolkit is a great resource for helping you to align stakeholders and take control of your content. If you’re a seasoned professional or just getting started, Meghan’s experience guides you through complex, challenging projects. Business goals? Check. User needs? Check. You with a satisfied smile from a job well done? Check.”

—Andrew Crow,
Head of Design, Uber

“You will thank Meghan for her no-nonsense approach to forming and executing content strategy. If you apply the techniques and tips in this book, you will advance not only your content but also your career.”

—Colleen Jones,
CEO of Content Science and Author of Clout: The Art + Science of Influential Web Content

“Ms. Casey has written the essential guide for anyone involved in the creation and care of online content. She provides clear direction and scalable methods, explaining why they are important along the way. And, she’s included tips on how to talk about content strategy in the language of business and budgets. It’s easy-to-read, it’s actionable, and it’s certain to find a spot on every content strategist’s bookshelf.”

—Clinton Forry,
Vice President, Content Strategy at Weber Shandwick

“The path from content strategy to great, meaningful content can seem mysterious and daunting. The Content Strategy Toolkit is the roadmap we’ve been waiting for. I’m confident that Meghan Casey’s practical, accessible approach will lead to a lot more great content in the world. This book details every part of the process without being overwhelming. Having a strategy is one thing but making it a reality requires diligence. You’ll be glad you have this toolkit with you for the long haul. It’s easy to overlook the organizational change content strategy often requires, but this book covers all the messy practical realities in a pleasant and organized fashion. If you want your content strategy to succeed in the real world, buy this book now.”

—Erika Hall,
author of Just Enough Research and co-founder of Mule Design
FOREWORD

In February 2013, a relatively unknown content strategist named Jonathon Colman (now a renowned writer, speaker, and content strategist at Facebook) wrote a blog post titled “The Epic List of Content Strategy Resources.” He introduced the post by saying,

“I’ve collected over two hundred of the best content strategy resources.... My goal is to make it easy for you to learn about the field of content strategy, find content strategists and blogs to follow, and, hopefully, start contributing to our community.”

Jonathon’s post was a watershed for content strategists everywhere, both experienced and novice. Here was singular proof that, yes, content strategy was a Real Thing that made the world of content better. It brought together content strategy ideas, methodologies, and tools in a way no other body of work had done before.

For me, the existence of hundreds of content strategy resources in 2013 was something to celebrate in and of itself. When I first Googled “content strategy,” in 2008, I received fewer than 9000 search returns, 99 percent of which had nothing to do with the content strategy I was looking for. Five years later, here was a curated body of work representing the finest minds of our field, people who were tirelessly fighting the good fight to transform the way we think about content: not as a commodity, but as an organizational asset worthy of strategic consideration. It was impressive. It was inspiring. It was glorious.

It was also overwhelming, but in a good way—the same way a library can be overwhelming when you first walk in. So much to learn! What the industry needed next was a functional handbook, something people could put on their desks and grab whenever they needed it. We needed a book that was first and foremost a practical collection of tools, concrete examples that could instruct and empower content strategy novices, experts, and enthusiasts alike to elevate content everywhere.

That was 2013. Since then, the ideas, methodologies, and tools for content strategy have proliferated at an even greater speed. Today, Google returns over four million search results for content strategy. It’s clear proof that companies have finally acknowledged that, hey, content is hard, and their last site redesign/CMS migration/content marketing campaign only made things worse. They need people who know this stuff inside and out, who can bring a new level of content expertise to the table in the strategic planning process.
And that’s where you come in.

If you’re holding this book, you are now the proud owner of the **definitive collection of content strategy tools** that exists today. In it, Meghan shares not only her own favorite tools but many from the industry’s top thinkers, people like Rachel Lovinger, Sara Wachter-Boettcher, Margot Bloomstein, and Kathy Wagner. It’s your new secret weapon in the battle for better content. It’ll make you smarter, more confident, and more effective in your work, whether that’s content strategy or anything that could benefit from it (like marketing, digital design, communications, social media, SEO, CMS, even certain types of organizational change).

Our industry owes Meghan many, many high fives for *The Content Strategy Toolkit*. Read it, highlight it, sticky note it, give copies to your coworkers. It’s the content strategy resource we’ve all been waiting for, and I’m grateful it’s finally here.

Kristina Halvorson  
CEO, Brain Traffic  
Coauthor, *Content Strategy for the Web*
Hi. I’m glad you picked up this book. I wrote it because I’ve often wished for a resource chock-full of tools and insights that would help me solve my clients’ content problems. That stuff is out there, but you kinda have to dig for it.

I should probably level-set about how I approach content strategy. My approach takes into account a lot of really great definitions, like:

“Content strategy plans for the creation, publication, and governance of useful, usable content.”

—Kristina Halvorson, president of Brain Traffic and author of *Content Strategy for the Web*

“Content strategy uses words and data to create unambiguous content that supports meaningful, interactive experiences.”

—Rachel Lovinger, experience director and content strategist at Razorfish

“Content strategy deals with the planning aspects of managing content throughout its lifecycle, and includes aligning content to business goals, analysis, and modeling, and influences the development, production, presentation, evaluation, measurement, and sunsetting of content, including governance. What content strategy is not is the implementation side. The actual content development, management, and delivery are the tactical outcomes of the strategy that need to be carried out for the strategy to be effective.”

—Rahel Anne Bailie, principal of Intentional Design and coauthor of *Content Strategy: Connecting the Dots Between Business, Brand, and Benefits*

Here’s my working definition:

Content strategy helps organizations provide the right content, to the right people, at the right times, *for the right reasons.*

“For the right reasons” is the most important phrase in that definition. Without clarity about the why—the purpose—it’s almost impossible to meet user needs or achieve business goals. Content strategy defines content purpose, then guides planning for the creation, publication, and maintenance of that content.
I'm a fan of Brain Traffic’s content strategy “quad.”

The quad framework makes a lot of sense because it binds together everything that goes into creating successful content experiences by purpose. The inner circle of the quad is the core content strategy—the content purpose.

Surrounding the core strategy are four quadrants:

- **Substance** defines what content the organization should produce, how it should sound, and why it’s meaningful or relevant to users.

- **Structure** refers to how content is organized and displayed so users can find and use the content they need.

- **Workflow** is how content flows through the organization—from ideation to publication to ongoing maintenance.

- **Governance** details how the organization makes decisions about content to ensure that it’s on-strategy.

I’ll refer to these quad areas throughout the book. I hope you find it to be a helpful framework.

As you work your way through *The Content Strategy Toolkit*, keep in mind: This book is not a manual you can follow to do content strategy for every project. That’s not how content strategy works—really, does any project or process? Standard methodologies might feel safe, but they’re actually dangerous. You need flexibility, agility, and a bunch of tools to get the work done. Some of the tools in the kit are going to apply to your situation and some aren’t. Some might apply, but only if you adapt them to a specific need or evolve them based on your own experience. And you should!
WHO THIS BOOK IS FOR

It’s for you! Seriously, if you picked up this book, chances are good you are:

- An aspiring content strategist
- An experienced content strategist who’s looking to up her game
- A manager building a content strategy team
- A designer, developer, marketer, or communicator who wants to make content strategy a part of your process
- About to hire a third-party content strategy resource and you want to become familiar with the type of work you’ll be collaborating on
- An educator teaching a class on digital design and content

If you’re not on this list, that’s OK. You can still read it.

HOW TO USE THIS BOOK AND GET THE TOOLS

If you’re new to content strategy or if you’re working on your first content strategy project, I recommend you read the book sequentially. It can serve as a manual for your project. Just keep in mind that no project is exactly the same, and you’ll need to modify for your needs.

For those of you who have a few content strategy projects under your belt, the book can be an encyclopedia. You might reference it for ideas at specific times in your project or for an idea from one of the included tools.

As you’re reading or flipping through the book, you’ll notice some hints and tips. An explanation for each is included in the examples to the left.

Text that appears in angle brackets and in italics is a **placeholder** used to demonstrate a concept. Here’s an example: You assume that `<company>` will complete the site inventory and that `<agency>` will use the inventory to conduct the audit.

Each chapter contains one or more tools with explanations related to how they apply that chapter’s tasks. You can find them easily because the pages with tools on them will be visible when you flip through the book.
CONTENT STRATEGY TOOL 7.2

USER RESEARCH WORKSHOP ACTIVITIES

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

TIPS

- Adapt the exercises to your situation. For example, if you're not all in the same room, you might brainstorm in a Google doc that everyone can see or use an online brainstorming tool.
- During the user story exercise, listen in on participants’ conversations to get even more insights that might not make it into their worksheet.

WHERE TO GET IT

Download the workshop plan at www.peachpit.com/register.

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

Or, you can use the appendix to find which tools are in each chapter in case you need a quick review.

To access and download the tools:

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 zip file, ContentStrategyTools.zip, that contains all the tools.

ONE LAST THING

I don’t really have much more to say. It just seems rude to send you off with a set of instructions.

So, let’s get started. Get comfy. Grab a cup of coffee or whatever else you’d like to drink. Find some sticky notes and a highlighter. Keep your computer handy to download any must-have-right-now tools. (Hmmm, this is sounding like a set of instructions.)

Most of all, enjoy!
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OK, so now is the time for the “content strategy is not always a linear thing” speech.

Setting and aligning on project objectives happens at the beginning of your project, for sure. But it also happens throughout the project. Sometimes objectives change. And sometimes people just need to be reminded of what they agreed to in the beginning.

You can’t realign if you didn’t align in the first place. So this step is critical. Even if it’s difficult, don’t skip it.
SET THE TABLE

Preparation is the key to a successful alignment session. Preparation means a few things here. First, it means getting the right people in the room. Second, it means planning how you’ll get from “what are we doing here?” to “let’s move forward.” And, third, it’s helping your stakeholders be engaged, thoughtful participants.

THE PEOPLE

Getting the right people involved from the start is probably the most important thing you can do at this stage. So get out your stakeholder matrix from Chapter 3 (Content Strategy Tool 3.1).

Aren’t you glad you filled that out?

Now make yourself a four-square grid on a piece of scrap paper. On the x axis (horizontal), put Strategic on the left side and Implementer on the right. On the y axis (vertical), put Influencer on the bottom and Decision Maker at the top.

On your four squares, start plotting people in the appropriate places. You’ll likely have to make some tough decisions about who to invite to the planning table. Aim for no more than 12 people in your alignment session. It’s a small enough number to be manageable, yet large enough to get representation across stakeholder types and to do some small group work if that ends up in your plan.
Invite derailers—get them involved now and deal head-on with their objections. Don’t shy away from inviting people you know will disagree. Now is the time to get those disagreements on the table and work through them. Remember, their objections are just a need you haven’t uncovered yet.

You can probably leave out product/service/offering experts for now. But consider including people responsible for technology, your CMS, and so on. If you have the room, invite someone who plays a user proxy role to help ensure you’re keeping your audience in mind. Think about who is going to be most willing to speak up and not just say what everyone else is saying (unless they truly agree, of course).

If you have anyone in the upper-right quadrant—implementers who are also decision makers—you’re going to need to dig into that later. It usually suggests you have people who should be playing a more strategic role doing the work of an implementer. Although that situation can be OK, it often means you’re not using their skills and expertise appropriately or they need to work on delegation.

THE PLAN

The most important part of your plan is to decide what it is you want to achieve during the session. In most cases it’s something like:

Agree on the objectives and scope for the project and understand the next steps, including how each person in the room will be involved.

With your session objective in mind, you can start planning the session. Depending on how many stakeholders you invite, how familiar they are with the project already, and how much discussion you think will be needed to get to alignment, shoot for a three- to six-hour session.

Using the session objective example, an agenda would likely look something like Table 4.1.

Before moving on, a few of notes about the agenda:

- In the first part of the meeting, take a few minutes to explain what content strategy is.
- Walk through the work you’ve done so far that led to the project’s approval. You can reuse what you put together to get funding or resources.
Don't skimp on the introductions. Even in a small company where everyone knows each other, people can come away with a new perspective on a person or team. And in larger companies, your meeting might be the first time a group of people has been in the same room.

When you're wrapping up, give a high-level overview of how you'll communicate with workshop participants to provide updates and ask for their assistance or input.

### TABLE 4.1 SAMPLE AGENDA

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Background and Ground Rules:</strong> Explain the project, why people were invited, and the rules you expect participants to follow.</td>
<td>15 minutes</td>
</tr>
<tr>
<td><strong>Introductions:</strong> Share your name, your title, and why you were invited.</td>
<td>30 minutes</td>
</tr>
<tr>
<td><strong>Individual Exercise and Discussion:</strong> Fill out the worksheet that covers business/department/team goals, problems and opportunities, and personal viewpoints, and then discuss with the group.</td>
<td>30 minutes</td>
</tr>
<tr>
<td><strong>Problems Post-up and Grouping:</strong> Brainstorm problems this project should help solve, and then group them into categories.</td>
<td>45 minutes</td>
</tr>
<tr>
<td><strong>Perfect World Post-up and Grouping:</strong> Brainstorm how things will be different if the project is successful, and then group into categories.</td>
<td>30 minutes</td>
</tr>
<tr>
<td><strong>Reality Brainstorm:</strong> Make two columns on the board, and brainstorm—based on the previous two activities—what this project can help with and what it can’t realistically improve or change.</td>
<td>20 minutes</td>
</tr>
<tr>
<td><strong>Objectives Synthesis:</strong> Work together to synthesize the identified problems, perfect world, and reality items into project objectives.</td>
<td>60 minutes</td>
</tr>
<tr>
<td><strong>Roadmap:</strong> Brainstorm the steps necessary to reach the objectives, and then map them to a timeline; have each person say where they think they need to be involved and how.</td>
<td>60 minutes</td>
</tr>
<tr>
<td><strong>Recap and Next Steps:</strong> Summarize the progress you made in the session and what will happen next.</td>
<td>15 minutes</td>
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</tbody>
</table>

The **Content Strategy Tool 4.1** is a full, downloadable plan based on the sample agenda with exercise instructions and templates. Later in this chapter, you’ll learn some facilitation techniques and ideas for making the session as productive as possible.
CONTENT STRATEGY TOOL 4.1

OBJECTIVE ALIGNMENT SESSION PLAN

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.

TIPS

- Consider your audience. Although I can usually get anyone to do workshop exercises with lots of sticky notes, some groups will just never be sold. In those cases, just facilitate an out-loud brainstorm, and write things on an easel or whiteboard.
- This plan is pretty versatile for a beginning-of-project session, and you can always change it up.
- The timing is based on a group that will likely need to have a fair amount of discussion and clocks in at almost five hours. Adjust the time as you see fit.

WHERE TO GET IT

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

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

THE PARTNERS

You want people coming to your alignment session feeling smart, valued, and ready to participate. To help them get into this mindset, introduce the project with an in-person discussion (whenever possible) and follow up with an email (the Content Strategy Tool 4.2 is a sample email you can download) and meeting invitation.

I recommend sending your email separate from a meeting invitation. I’ve found that the message often gets lost in the invitation itself, and you end up with a bunch of people confused about why they were invited and more likely to RSVP with a No.

Follow the same outline in your in-person conversation and your email, and include the following elements:

- **Introduction**—Even if you think they know who you are, say what your role is in the organization. If you’re a consultant, work with your client to write the email to introduce you to the team.
- **Overview of the project**—Explain this in terms of the opportunity to solve a problem the stakeholder cares about.

- **Why you need him or her**—Tell each person why you specifically want him or her involved. Make each person feel important.

- **The team**—Let them know who else you're inviting and for what purposes so they can see how they fit within the larger group. You don't have to list each person individually, but give them a sense of who's involved.

- **Expectations**—Tell them a bit about the meeting and the kinds of ideas and input they'll be asked to contribute. Then, let them know how you imagine they'll be involved moving forward.

- **A big thank you**—Recognize that this is a commitment and that you realize they are taking time away from other pressing projects and tasks. They'll appreciate it.

---

**KICK OFF FOR CLARITY**

When you're kicking off a content strategy project, think of yourself as a consultant (even if you're internal to the organization). One of a consultant’s primary jobs is to create clarity. That’s what this alignment session is all about.

With that in mind, think about whether you can be both the consultant or facilitator and an active participant. Most experienced facilitators will suggest that you bring in someone from the outside (not necessarily outside the organization, but outside the project) to facilitate one of these clarity-getting conversations.

It’s really up to you. If you feel you'll have a hard time facilitating conversation because you'll be worried that your viewpoints won't be heard and included, ask a colleague to help. If you're working with a consultant, you should probably let the consultant lead the meeting.

Now let’s dig in to some facilitation best practices and tips.

**GROUP DECISION MAKING**

It’s important to understand how group decision making works so you don’t become discouraged when things seem to be falling apart—and a time will occur in your meeting when the process does seem to be falling apart. That usually happens before a big breakthrough.
PROJECT KICK-OFF EMAIL

Download the example email as a starting point:

Hi Jane,

It was great to talk with you today about the Intranet Content Overhaul project.

OR

I’m John Doe, Employee Communications Manager in the Communications Department. I’m working on a project to overhaul the content on our intranet.

OR

I’m John Doe, Employee Communications Manager in the Communications Department. I’m working with Meghan Casey from Brain Traffic on a project to overhaul the content on our intranet.

Project Overview

The purpose of the project is to make our content easier to find and easier to understand and act upon. We’ve found that employees spend 30 minutes per week looking for content, and a lot of them end up calling support because they didn’t get the answer they needed. That’s costing us a ton in productivity and support center costs.

Your Involvement

I’m hoping you can participate in our strategic project kick-off because you have a good sense of the kinds of calls employees contact support about, and also because your team is skilled at writing support content scripts—we could use that skill to write better intranet content.

The Workshop

We’ll be inviting a representative from each business area that provides information for employees on the intranet, leaders from HR and Employee Communications, and the manager of the team that runs the site.

The goal of the workshop will be to identify the objectives for the project. So we’ll be asking about business goals, employee needs, and challenges/barriers.

I’ll send an invitation separately—you can expect the meeting to be approximately four hours with a couple of breaks. Thank you in advance for your participation. I know that this is just one more thing to add to your list, and I really appreciate you making it a priority.

Best,

John

TIP

- Don’t send the same email to every stakeholder. A little personalization goes a long way.
- Watch your tone. Emails like this can easily sound patronizing or overly formal. Read it aloud before sending. If you wouldn’t say what you wrote in person, try again.

WHERE TO GET IT

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

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)
In the book *Facilitator’s Guide to Participatory Decision Making*, Sam Kaner and his team coined the Diamond of Participatory Decision Making to explain this phenomenon. It’s a pretty useful reminder of how your meeting is likely to go.

In a nutshell, the diamond suggests that you’re going to start with a lot of ideas and opinions. Then, you’re going to get to a point where a lot of discussion and disagreement take place, consensus may be hard to come by, and everyone will be frustrated. But then, the ideas will converge, and you’ll sigh collectively. The example alignment session plan from the Content Strategy Tool 4.1 was designed to take advantage of how group decisions are typically made.

**GROUND RULES**

These pretty simple ground rules before you get started are kind of a no-brainer, but a good reminder nonetheless. You wouldn’t need the rules if they were never broken, intentionally or unintentionally. The ones I typically start with are:

- No laptops, no phones (unless you need them to participate).
- Avoid interrupting.
- Every opinion is valid, and no idea is a bad idea when brainstorming.
- Asking for clarification is OK.
- Everyone talks and everyone listens.
- No side conversations.
You might not need all the rules on this list, and you might need others that aren’t listed, depending on your office culture. You can add ground rules as you go if you notice things going awry.

**FACILITATIVE LISTENING**

The person facilitating the discussion is a bit like connective tissue, employing techniques to spur discussion, connect the dots, build on ideas, and identify agreement and disagreement.

Here are just a few of those techniques.

**PARAPHRASING**

Paraphrasing is all about letting the participants know that you’re listening and reiterating their thoughts to the larger group. Paraphrase to get clarity and to ensure everyone understood what was said. Use phrases like “I think what you’re saying is… Is that what you meant?”

**DRAWING PEOPLE OUT**

Sometimes stakeholders will have a hard time articulating their idea, which can cause them to stop trying to explain it and withdraw. The facilitator can—and should—help in these situations. Start by paraphrasing what you think they meant, and then ask a follow-up question such as “Can you think of an example when that happened?” or “Tell me a little more about that.”

**CONVERSATION TRACKING**

I’m sure you’ve been in a meeting when suddenly two or more conversations are happening at the same time. Sometimes side conversations are taking place (which are against the ground rules!). But sometimes people are just focused on different aspects of a question. All those aspects are likely important. As a facilitator, you want to listen for the various tracks and lead conversations around them. When you notice multiple conversations, you can say, “It seems we’re discussing a few different things here. Let’s talk about them one at a time so that we don’t lose anything.”
SILENCE

If you’re like me, this silence thing is really difficult. It’s also really effective. You can use it a few ways. One is to just give people a chance to collect their thoughts. Don’t jump to fill the silence. Another is to slow down the conversation when something exceptional has happened—someone shares an idea that seems to blow everyone away, or agreement was reached when you never thought it would be. And sometimes, people just need a break. It’s OK to say, “Let’s just sit for a minute and process what we’ve just discussed.”

UNDERSTANDING CONSENSUS

Well that’s the whole point of this alignment session, isn’t it? A key point to remember about consensus and alignment is that they don’t necessarily mean total agreement in what was decided. What it does mean is that the people in the room agree to move forward with a set of objectives the group came up with together. Consensus is reached when all participants feel their ideas have been heard and considered. And when all people feel this is true, they are more likely to stand behind the project and stay engaged. That’s what you need for your project to be successful.

ALIGNED AND READY

You’ve come a long way. You have a group of stakeholders who all agree on the project’s objectives. You’ve likely gained some unexpected allies and support—maybe turned a derailer or two into a champion. This is getting exciting, right?

In the next chapter, you’ll learn about how to run the project so you can keep stakeholders engaged and the work on track.
INDEX

A
Aalen, Ida 170
about this book xxvi–xxvii
alignment sessions 38–46
  communicating about 41–42, 43
ground rules for 44–45
group decision making in 42, 44
guidelines for facilitating 42, 44–46
listening techniques used in 45–46
meaning of consensus in 46
people involved in 38–39
planning for 39–41
sample agenda for 40
analytics review 8, 11, 87, 149–150
app content inventory 103
arguments 19–22
ask, the 22
attitudes 81
audience 138, 139
audit criteria matrix 10
audit spreadsheet 8, 156, 216
auditing content 7–8, 10, 103–105, 202
authority 112, 203–205
  implementation 203, 205
  strategic 203, 204–205
  behavior 21
Backie, Rahel Anne xxiv
behaviors 82
beliefs 81
Benson, Christine 113
Bloomstein, Margot 195
bounce rates 150
Brain Traffic xxv, 121, 167
brainstorming 88
Breker, Melissa 204
budget 52, 57–58
business environment 65–77
  documentation review 75–77
  external factors 70–71
  internal factors 66–69
  stakeholder interviews 72–75
business goals 124, 138, 139, 148
Business Model Canvas 67, 218
business objectives 170
business-person thinking 16
B
backing, argument 21
Backie, Rahel Anne xxiv
behaviors 82
beliefs 81
Benson, Christine 113
best practices review 151
Bloomstein, Margot 195
bounce rates 150
Brain Traffic xxv, 121, 167
brainstorming 88
Breker, Melissa 204
budget 52, 57–58
business environment 65–77
  documentation review 75–77
  external factors 70–71
  internal factors 66–69
  stakeholder interviews 72–75
business goals 124, 138, 139, 148
Business Model Canvas 67, 218
business objectives 170
business-person thinking 16
C
calendar, editorial 212–214, 223
Campbell, Joseph 88
card-sorting exercise 195–196, 222
Casey, Meghan 77
centralized models 188
challenges 123–127
champions 28
check-ins 59–60
checklists
  feedback 199
  project preparation 48, 218
claim, argument 21
clarity 42, 111
collaborative approach
to core strategy statement 141–142
to messaging framework 145
Colman, Jonathon xxii, 149, 150
communications
  alignment session 41–42
  project update 54
  stakeholder 34
Communications Management Plan 35, 217
compass of content. See content compass
competitors 70
compliance issues 70
comprehension of content 107
concerns 81
consensus 46
consultants 42
content
  auditing 7–8, 10, 103–105, 202
  creating 187–199
  designing 159–183
  determining problems with 6–12
  documenting the details of 96–97
  ecosystem visualization of 98–99
  getting familiar with 93–108
  inventories of 101–103
  making a list of 94–95
  mapping 105–106
  opportunities to improve 13–14
  project scope examples 95
  structure of 169
  taking snapshots of 99–108
  user testing 8–9, 11–12, 106–108
content audit 7–8, 10, 103–105, 202
content compass 135–146
  core strategy statement 138–143
  messaging framework 143–146
  project types and 136–138
content creation 187–199, 203
  process overview 191–193
  roles and responsibilities 188–191
  tools and guidelines 194–199
content design 159–183
  organization in 164–168
  overview explaining 160–161
  presentation in 169–180
  prioritization in 161–163
  specifications in 180–183
content ecosystem analysis 33
content effectiveness 156–158
content engagement 126
Content Everywhere (Wachter-Boettcher) 102, 169
content landscape list 97, 219
content lifecycle 202–203
content management models 188
content management system (CMS) 6
content maps 105–106
content models 176–180
  making lists for 177–179
  reconstructing views for 179–180
  spreadsheet template for 179, 222
content objectives 124, 148
content overlays 180–181, 222
content product 138, 139
content product planning 209–212
content production inventory 194
Content Scorecard Report sample 157, 158, 221
content strategy 202
  content compass and definitions of xxiv
  design related to 159–183
  measuring success of 147–158
  quad framework for xxv
Content Strategy at Work (Bloomstein) 195
Content Strategy for Mobile (McGrane) 137
Content Strategy for the Web (Halvorson and Rach) 183
content strategy skillsets 204, 223
content strategy tools 215–223
  accessing/downloading xxvii, 215
audit spreadsheet 8, 156, 216
Business Model Canvas 67, 218
card-sorting exercise 195, 222
Communications Management Plan 35, 217
content landscape list 97, 219
content model spreadsheet 179, 222
content overlay and page table templates 181, 222
content prioritization templates 163, 222
Content Scorecard Report sample 157, 221
content strategy skillsets 204, 223
  core model instructions and worksheets 172, 222
Data Sets You Free presentation 150, 221
detailed timeline 57, 218
Discovery Insights Workbook 77, 128, 156, 218
Heuristics Framework Cheat Sheet 151, 221
job time worksheet 114, 220
Mad Lib worksheet 142, 221
messaging framework template 146, 221
objective alignment session plan 41, 217
planning and process workshop activities 117, 220
presentation outline deck 20, 216
project kick-off email 43, 217
project management plan template 50, 218
project preparation checklist 48, 218
roles and responsibilities matrix 189, 222
content strategy tools (continued)

stakeholder interview guide 73, 218
stakeholder matrix 31, 217
user research workshop 90, 219
user tests 9, 108, 216, 219
user understanding matrix 83, 219

conversations
focused 73
tracking 45
core model 170–176
case study 170–171
purpose and results 171
workshop instructions 171–176
core pages 171, 172
core strategy statement 138–143
approaches to crafting 141–143
characteristics of 139–140
questions essential to 138

Covert, Abby 151, 152

creating content. See content creation
current events 71
customers
as external factor 71
as internal factor 68

D

Data Sets You Free
presentation 150, 221
decentralized models 188
decision makers 28
decision making
authority and 112
group 42, 44

problems with 115, 116–117
scoring system for 116, 117
derailers 29, 39
designing content. See content design
Designing for the Digital Age (Goodwin) 72, 73
detailed timelines 56–57, 218
Diamond of Participatory Decision Making 44
Discovery Insights Workbook 77, 128, 156, 218
documentation review 75–77, 87
documenting
content creation process 193
content details 96–97
content effectiveness 156
hypotheses about content problems 6–7
measurement methods 155
page specifications 180–183
drawing people out 45

e

ecosystem analysis 33
editor role/responsibilities 189
editorial planning 209, 212–214
Edwards, Matt 88
effectiveness of content 156–158
email
personalizing 42, 43
project kick-off 41, 43, 217
expenditures 69
experience
problems with skillsets and 111–112
researching customer 81
<table>
<thead>
<tr>
<th>Term</th>
<th>Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>experts</td>
<td>29</td>
</tr>
<tr>
<td>external factors</td>
<td>70–71</td>
</tr>
<tr>
<td>competitors</td>
<td>70</td>
</tr>
<tr>
<td>customers</td>
<td>71</td>
</tr>
<tr>
<td>legal, compliance, and regulations</td>
<td>70</td>
</tr>
<tr>
<td>trends and current events</td>
<td>71</td>
</tr>
<tr>
<td>facilitators for alignment sessions</td>
<td>42</td>
</tr>
<tr>
<td><em>Facilitator’s Guide to Participatory Decision Making</em> (Kaner)</td>
<td>44</td>
</tr>
<tr>
<td>favorability of content</td>
<td>107</td>
</tr>
<tr>
<td>feedback</td>
<td></td>
</tr>
<tr>
<td>forms and checklists</td>
<td>197–199</td>
</tr>
<tr>
<td>gathering from users</td>
<td>153–155</td>
</tr>
<tr>
<td>Fenton, Nicole</td>
<td>196</td>
</tr>
<tr>
<td>findability of content</td>
<td>107</td>
</tr>
<tr>
<td>first impressions</td>
<td>144, 145</td>
</tr>
<tr>
<td>fixed-bid projects</td>
<td>57</td>
</tr>
<tr>
<td>focused conversation</td>
<td>73</td>
</tr>
<tr>
<td>Foresee tool</td>
<td>153</td>
</tr>
<tr>
<td>forward paths</td>
<td>174</td>
</tr>
<tr>
<td>function projects</td>
<td>136</td>
</tr>
<tr>
<td>governance</td>
<td>xxv, 203–214</td>
</tr>
<tr>
<td>assigning authority</td>
<td>203–205</td>
</tr>
<tr>
<td>maintaining current content</td>
<td>206–209</td>
</tr>
<tr>
<td>planning new content</td>
<td>209–214</td>
</tr>
<tr>
<td>ground rules, alignment session</td>
<td>44–45</td>
</tr>
<tr>
<td>grounds, argument</td>
<td>21</td>
</tr>
<tr>
<td>group decision making</td>
<td>42, 44</td>
</tr>
<tr>
<td>guidelines</td>
<td></td>
</tr>
<tr>
<td>alignment session facilitation</td>
<td>42, 44–46</td>
</tr>
<tr>
<td>content creation tools and</td>
<td>194–199</td>
</tr>
<tr>
<td>Halland, Are</td>
<td>170, 172</td>
</tr>
<tr>
<td>Halvorson, Kristina</td>
<td>xxiii, xxiv, 139, 183</td>
</tr>
<tr>
<td><em>Hero with a Thousand Faces, The</em> (Campbell)</td>
<td>88</td>
</tr>
<tr>
<td>heuristic assessments</td>
<td>151–153</td>
</tr>
<tr>
<td>Heuristics Framework Cheat Sheet</td>
<td>151, 221</td>
</tr>
<tr>
<td>hidden stakeholders</td>
<td>75</td>
</tr>
<tr>
<td>high-level timelines</td>
<td>55</td>
</tr>
<tr>
<td><em>How to Measure Anything</em> (Hubbard)</td>
<td>18</td>
</tr>
<tr>
<td>Hubbard, Douglas W.</td>
<td>18</td>
</tr>
<tr>
<td>hybrid models</td>
<td>188</td>
</tr>
<tr>
<td>hypotheses about content problems</td>
<td></td>
</tr>
<tr>
<td>documenting</td>
<td>6–7</td>
</tr>
<tr>
<td>experiments for measuring</td>
<td>10–12</td>
</tr>
<tr>
<td>methods for proving/disproving</td>
<td>7–9</td>
</tr>
</tbody>
</table>

**G**

<table>
<thead>
<tr>
<th>Term</th>
<th>Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gale, Pete</td>
<td>9</td>
</tr>
<tr>
<td>Goodman, Elizabeth</td>
<td>89</td>
</tr>
<tr>
<td>Goodwin, Kim</td>
<td>72, 73</td>
</tr>
<tr>
<td>Google Analytics</td>
<td>11, 149</td>
</tr>
<tr>
<td>GOV.UK website</td>
<td>9</td>
</tr>
</tbody>
</table>
I

implementation authority 203, 205
implementers 29
influencers 28
Interactive Project Management (Lyons and Wilker) 50
internal factors 66–69
customers 68
expenditures 69
offerings 67–68
revenue 68–69
internal non-monetary projects 58
interpretive questions 74
interviewing stakeholders 32–33, 72–75
conducting interviews 74–75
downloading a guide for 73
planning interviews 72–73
structuring interviews 73–74
interviewing users 90, 153–155
inventories
content 101–103
content production 194
document 75–76
inward paths 173

J

job time worksheet 113, 114, 220

K

Kaner, Sam 44
key performance indicators (KPIs) 148
Kuniavsky, Mike 89

L

Lee, Kate Kiefer 196
legal issues 70
lexicon, project 51–52
lifecycle of content 202–203
listening
facilitative 45–46
focusing on 74
Lovinger, Rachel xxiv, 176
Lyons, Nancy 50

M

Mad Lib worksheet 141, 142, 145, 221
maintenance 202, 206–209
planned 206–207
unplanned 207–209
mapping content 105–106
market research 80
matrix
audit criteria 10
project team 53
risk tolerance/confidence level 84–85
stakeholder 31, 38, 217
user understanding 82–83, 218
McGovern, Gerry 161, 170
McGrane, Karen 102, 137
measurement 147–158
analytics review for 149–150
choosing metrics for 149–155
of content effectiveness 156–158
defining terms for 148–149
documentation required for 155
heuristic assessments for 151–153
user feedback for 153–155
messaging framework 143–146
approaches to developing 145–146
characteristics of 143–144
template for 146, 221
metrics 148, 149–155
See also measurement
Mobile Content Strategy
(McGrane) 102
mobile websites 137, 175
Moed, Andrea 89
motivations 82

N
naming users 88
narrative, workflow 193
Netlife Research 170, 172
Nicely Said: Writing for the Web with Style and Purpose
(Fenton and Lee) 196
Nielson, Jakob 151
non-monetary costs 19
note-taking process 74–75

O
objective alignment sessions.
See alignment sessions
objective questions 73
objectives
content 124, 148
definition of 148
observation of users 90
Observing User Experience
(Goodman, Kuniavsky, and Moed) 89
offerings, business 67–68
opportunities
defining challenges and 123–127
quantifying 16–19
turning problems into 13–14
opportunity statements 14
organization of content
160, 164–168
sitemaps for 164–166
taxonomies for 167–168
overlays, content 180–181, 222
owner role/responsibilities 190

P
page tables 181, 182–183, 222
paraphrasing 45
planned maintenance 206–207
planning 54–58, 202, 209–214
alignment sessions 39–41
budgets 57–58
content product 209–212
editorial 209, 212–214
maintenance activities 206–207
problems with processes and 114–119
stakeholder interviews 72–73
timelines 54–57
preparation process 48–54
getting everyone on the same page 50–54
setting up the project 48–49
<table>
<thead>
<tr>
<th>presentation of content</th>
<th>160, 169–180</th>
</tr>
</thead>
<tbody>
<tr>
<td>content models for</td>
<td>176–180</td>
</tr>
<tr>
<td>core model for</td>
<td>170–176</td>
</tr>
<tr>
<td>presentation outline</td>
<td>20, 216</td>
</tr>
<tr>
<td>deck</td>
<td></td>
</tr>
<tr>
<td>print content</td>
<td>103</td>
</tr>
<tr>
<td>prioritization of</td>
<td>160, 161–163</td>
</tr>
<tr>
<td>content</td>
<td></td>
</tr>
<tr>
<td>problems with content</td>
<td></td>
</tr>
<tr>
<td>documenting hypotheses</td>
<td>6–7</td>
</tr>
<tr>
<td>about</td>
<td></td>
</tr>
<tr>
<td>experiments for</td>
<td>10–12</td>
</tr>
<tr>
<td>measuring</td>
<td></td>
</tr>
<tr>
<td>methods for proving</td>
<td>7–9</td>
</tr>
<tr>
<td>disproving</td>
<td></td>
</tr>
<tr>
<td>reasons for determining</td>
<td>6</td>
</tr>
<tr>
<td>turning into opportunities</td>
<td></td>
</tr>
<tr>
<td>processes</td>
<td></td>
</tr>
<tr>
<td>content creation</td>
<td>191–193</td>
</tr>
<tr>
<td>problems with planning</td>
<td>114–119</td>
</tr>
<tr>
<td>and understanding people</td>
<td>12–13</td>
</tr>
<tr>
<td>project charter</td>
<td>50–54</td>
</tr>
<tr>
<td>project kick-off email</td>
<td>43, 217</td>
</tr>
<tr>
<td>Project Management Docs</td>
<td></td>
</tr>
<tr>
<td>website</td>
<td>35</td>
</tr>
<tr>
<td>project management plan</td>
<td>50–54, 218</td>
</tr>
<tr>
<td>project managers</td>
<td>48</td>
</tr>
<tr>
<td>project owners</td>
<td>28</td>
</tr>
<tr>
<td>project preparation</td>
<td>48, 218</td>
</tr>
<tr>
<td>checklist</td>
<td></td>
</tr>
<tr>
<td>project scope</td>
<td>95</td>
</tr>
<tr>
<td>project status reports</td>
<td>58–59</td>
</tr>
<tr>
<td>project team</td>
<td>53</td>
</tr>
<tr>
<td>project types</td>
<td>136–138</td>
</tr>
<tr>
<td>function projects</td>
<td>136</td>
</tr>
<tr>
<td>property projects</td>
<td>137</td>
</tr>
<tr>
<td>subset projects</td>
<td>138</td>
</tr>
<tr>
<td>proof statements</td>
<td>144, 145</td>
</tr>
<tr>
<td>proofer role/responsibilities</td>
<td>191</td>
</tr>
<tr>
<td>property projects</td>
<td>137</td>
</tr>
<tr>
<td>publisher role/responsibilities</td>
<td>191</td>
</tr>
<tr>
<td>Q</td>
<td></td>
</tr>
<tr>
<td>quad framework</td>
<td>xxv</td>
</tr>
<tr>
<td>qualifier, argument</td>
<td>22</td>
</tr>
<tr>
<td>qualitative data</td>
<td>149</td>
</tr>
<tr>
<td>quantifying opportunities</td>
<td>16–19</td>
</tr>
<tr>
<td>quantitative data</td>
<td>149</td>
</tr>
<tr>
<td>questions</td>
<td></td>
</tr>
<tr>
<td>core strategy statement</td>
<td>138</td>
</tr>
<tr>
<td>stakeholder interview</td>
<td>73–74</td>
</tr>
<tr>
<td>user survey</td>
<td>154–155</td>
</tr>
<tr>
<td>R</td>
<td></td>
</tr>
<tr>
<td>Rach, Melissa</td>
<td>18, 183</td>
</tr>
<tr>
<td>readability of content</td>
<td>107</td>
</tr>
<tr>
<td>rebuttal, argument</td>
<td>22</td>
</tr>
<tr>
<td>reflective questions</td>
<td>74</td>
</tr>
<tr>
<td>regulations, business</td>
<td>70</td>
</tr>
<tr>
<td>reports</td>
<td></td>
</tr>
<tr>
<td>content effectiveness</td>
<td>156–158</td>
</tr>
<tr>
<td>project status</td>
<td>58–59</td>
</tr>
<tr>
<td>research</td>
<td></td>
</tr>
<tr>
<td>market</td>
<td>80</td>
</tr>
<tr>
<td>user</td>
<td>79–91</td>
</tr>
<tr>
<td>responsibilities</td>
<td></td>
</tr>
<tr>
<td>content creation</td>
<td>188–191</td>
</tr>
<tr>
<td>implementation authority</td>
<td>205</td>
</tr>
</tbody>
</table>
matrix of roles and 189, 222
problems with roles and 110–113
strategic authority 204–205
Revenue, business 68–69
review process
describing in project charter 54
documentation review 75–77
reviewer role/responsibilities 191
risk calculations 18
risk tolerance/confidence level matrix 84–85
roles
content creation 188–191
implementation authority 205
matrix of responsibilities and 189, 222
problems with responsibilities and 110–113
strategic authority 204–205
types of stakeholder 28–29
Rosenfeld, Lou 151
running the project 47–60
doing 58–60
planning 54–58
preparing 48–54
Silence 46
Sitemaps 164–166
Skillsets
content strategy 204, 223
problems with 111–112
Small, Emily 48, 56, 57
snapshots, content 99–108
specifications documents 160, 180–183
content overlays 180–181
page tables 181, 182–183
stakeholder interview guide 73, 218
stakeholder matrix 31, 38, 217
stakeholders 27–35
alignment sessions with 38–39
content effectiveness report to 156–158
crafting your approach to 31–33
interviews with 32–33, 72–75
keeping in the loop 34
listing and labeling 30
roles and types of 28–29
working sessions with 33, 59–60
workshops with 33, 87–89
status reports 58–59
stories, user 88–89
Strategic Alignment Summary 121, 122–129
business goals/content objectives 124
determining readiness for 122
evidence provided in 126
implications for content strategy 127
Strategic Alignment Summary

(continued)

introductory section 123
opportunity description 125
organizing for clarity and action 123–127
presenting to stakeholders 130
starter document for 128–129, 220
strategic authority 203, 204–205
strategic stakeholders 29
strategic workshops 33
Strategyzer website 67
structure of content xxv
structuring interviews 73–74
style guide 194–197
subject matter expert (SME) 182, 190
subset projects 138
substance of content xxv
surveys 153–155

T
tactical working sessions 33
tasks
project preparation 49
user 161, 170
taxonomies 167–168
team, project 53	templates
content model spreadsheet 179, 222
table 181, 222
content overlay 181, 222
topic prioritization 163, 222
template
editorial calendar 214, 223
messaging framework 146, 221
project management plan 50, 218
tests, user 8–9, 11–12, 106–108, 216, 219
thinking like a business-person 16
time and materials projects 58
timelines 52, 54–57
detailed 56–57, 218
high-level 55
tools. See content strategy tools
Top Tasks Analysis 161, 170
Toulmin’s Argument Model 19–22
trends, business 71
trigger brainstorm 88

U
unplanned maintenance 207–209
usability.gov website 89
user feedback 153–155
user interviews 90, 153–155
user needs 138, 139
user proxies 29
user research 79–91
appetite assessment 84–85
characteristics of 81–82
choosing subjects for 89
documentation review 87
interviews and observation 90
market research vs. 80
matrix for recording 82–83
methods for conducting 86–91
proposing an approach to 85–86
stakeholder workshop 87–89, 90
user stories 88–89
user tasks 161, 170
user testing 8–9, 11–12, 106–108, 216, 219
user understanding matrix 82–83, 218

V
value statement 144, 145
voice and tone algorithm 196–197

W
Wachter-Boettcher, Sara 60, 102, 141, 169
Wagner, Kathy 157
warrant, argument 21
Webb, Eileen 179
website content inventory 102–103
Wilker, Meghan 50
wireframe sketches 179–180
work capacity 112
workflows xxv
  content creation 191–193
  exercise for understanding 118–119
  problems with 116
working sessions 33, 59–60
worksheets
  core model 172, 222
  job time 114, 220
  Mad Lib 142, 221
workshops 33, 87–89, 90
writer role/responsibilities 190