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*

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New Riders
VOICES THAT MATTER™

THE CONTENT STRATEGY TOOLKIT: METHODS, GUIDELINES, AND TEMPLATES FOR GETTING CONTENT RIGHT

Meghan Casey

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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.

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ACKNOWLEDGMENTS

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.

Thank you to the rest of my Brain Traffic colleagues, too:

Tenessa Gemelke, thanks for reading the first few chapters and telling me how hard it was to find things to comment on. It was the confidence booster I needed. And the things you did find were good things that made the book better.

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Allison Beshara for your level head and stoic brand of motivation that is, well, somehow really super motivating. And for cutting me checks.

Moving on to my platonic and heterosexual life partners (inside joke, sorry):

Thank you, Tony Bauch, for being pretty much the best domestic companion a person could ask for. Especially a person burning the midnight oil to turn in chapters. The doggies and I appreciate everything you do. Thanks to Sam and Daisy, too.

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Then, there's just a full-on consortium of family, friends, content strategy comrades, and gym pals who have offered their encouragement, believed in me, or inspired me. I fear I will miss someone, and I'm sorry if I do. But hopefully you know who you are (now I know how Oscar winners feel):

... Jackie Casey, Erin Casey, William Casey, Sean Casey, Kathleen O'Brien Casey, Jacob Casey, Lizzie Casey, Carrol Burke, Alan Burke, Madison Burke Evans, Melissa Rach, Erin Anderson, Christine Benson, Julie Vollenweider, Sara Wachter-Boettcher, Lisa Maria Martin, Andrea Vogel, Cassie Hanson, Jenny Westbrooks, Julie Swenson, Sharon Oswald, Hannah Wydeven, Lucia Hawley, Jenn Schaall, Jen Alsted, Morgen Larson, Sally Franson, Emma Vasseur, Kaeti Hinck, Cadence Cornelius, Laurel Turek, Lara Friedman-Shedlov, Nicole Aul, Angela Fumanti, Hannah Peterson, Jonathon Colman, Margot Bloomstein, Sally Bagshaw, Kerry-Anne Gilowey, Keri Maijala, Hind Abu-Amr, Kelsey Halberg, Laura Heurung, Callie Myers, Robyn Stegmaier.

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Thanks, of course, to all the people I referenced, quoted, and borrowed from throughout the book (and in my practice). And to everyone who reviewed the book and wrote those blurby things.

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.

ABOUT THE AUTHOR

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*

INTRODUCTION

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

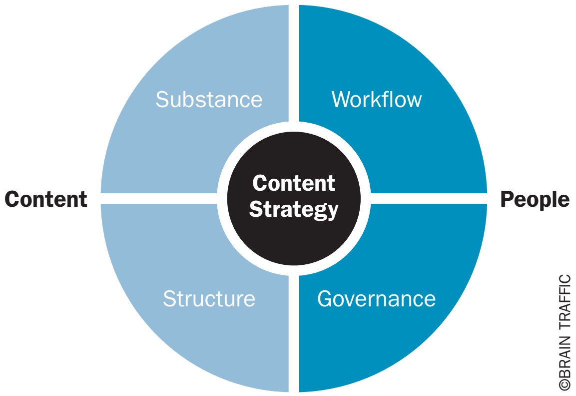
> "Content strategy deals with the planning aspects of managing content throughout its lifecycle, and includes aligning content to business goals, analysis, and modeling, and influences the development, production, presentation, evaluation, measurement, and sunsetting of content, including governance. 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.

HINT
These provide you with information on where to find additional resources. They might remind you where to find material that has already been covered or refer you to other sources.

TIP
These provide information to help you with the current task (tips-of-the-trade if you will).

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:

1. Visit peachpit.com/register.
2. Log in with your Peachpit account, or if you don't have one, create an account.
3. Register using the book's ISBN, 9780134105109, to download the 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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CHAPTER 4

SET AND ALIGN ON PROJECT OBJECTIVES

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.

Decision Maker	**UP TO 4 PEOPLE.** INCLUDES PROJECT SPONSOR IF THAT'S NOT YOU.	THESE PEOPLE DON'T USUALLY EXIST. IF THEY DO, INVITE THEM.
Influencer	**UP TO 4 PEOPLE.**	**UP TO 4 PEOPLE.**
	Strategic	*Implementer*

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/offerings 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.

TIP
Provide food for planning sessions over three hours. Coffee and a snack are probably wise for sessions shorter than three hours, too.

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**

ACTIVITY	DURATION
Background and Ground Rules: Explain the project, why people were invited, and the rules you expect participants to follow.	15 minutes
Introductions: Share your name, your title, and why you were invited.	30 minutes
Individual Exercise and Discussion: Fill out the worksheet that covers business/department/team goals, problems and opportunities, and personal viewpoints, and then discuss with the group.	30 minutes
Problems Post-up and Grouping: Brainstorm problems this project should help solve, and then group them into categories.	45 minutes
Perfect World Post-up and Grouping: Brainstorm how things will be different if the project is successful, and then group into categories.	30 minutes
Reality Brainstorm: 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.	20 minutes
Objectives Synthesis: Work together to synthesize the identified problems, perfect world, and reality items into project objectives.	60 minutes
Roadmap: 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.	60 minutes
Recap and Next Steps: Summarize the progress you made in the session and what will happen next.	15 minutes

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.

HINT
Your stakeholder matrix (Content Strategy Tool 3.1) comes in handy here, too. I recommend tailoring each email slightly for the specific stakeholder.

- **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.

CONTENT STRATEGY TOOL 4.2

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.

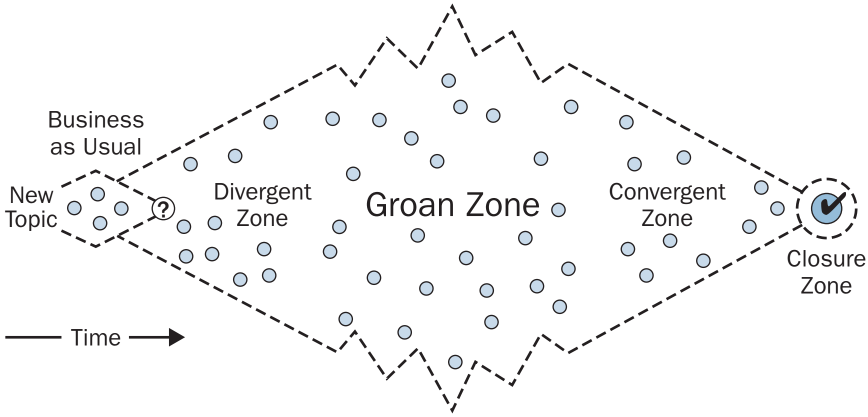
WHERE TO GET IT

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.

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