

S E C O N D E D I T I O N

THE CONTENT STRATEGY TOOLKIT



MEGHAN CASEY

New
Riders

VOICES THAT MATTER™

FREE SAMPLE CHAPTER |



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CONTENT STRATEGY
TOOLKIT



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IN PRAISE OF THE CONTENT STRATEGY TOOLKIT

“A good content strategist knows how to solve content problems. An excellent content strategist knows how to identify the right problems to solve. What makes Meghan Casey an absolute *super-hero* is that she’s seen just about every content problem there is, and she’s here to help you navigate yours, one manageable step at a time.

The Content Strategy Toolkit is just that. It delivers practical, easy-to-use methods for breaking down complexities at every stage of your content strategy journey. And reading it is like having a conversation with Meghan—her writing is so personable, and her advice seems tailor-made just for you.

Most importantly, this book bravely digs into what’s often at the root of most organizations’ content challenges: a lack of alignment on what matters and why. Once you get that alignment, successful content follows. Sounds overly simple, but it’s true.

Whether you’re tackling a one-time content project or gearing up for lasting cultural change, let Meghan be your guide. I’ve learned more from her than any other expert in the field.”

—Kristina Halvorson
Owner of Brain Traffic and the Confab and Button Conferences;
Author of *Content Strategy for the Web*

“I’m excited to replace the well-thumbed copy of Meghan’s book on my shelf with a brand-new edition, with new chapters about content design and content playbooks, and a WEALTH of online workshop activities! If you work in content strategy or content design, or you know someone who does, you need this book.”

—Andy Welkle
Co-author, *Writing Is Designing: Words and the User Experience*

“When I moved from building an agency content team of two to leading an enterprise-sized practice, the tools and templates in the first edition of Meghan’s book helped us standardize our processes and work more effectively (and efficiently) with partners. This second edition goes deep into three integral topics for content leaders—assembling cross-disciplinary teams, evaluating processes, and building a content playbook. If you’re looking to build a new practice or retool an existing one, this book will help you succeed.”

—Natalie Marie Dunbar
Author, *From Solo to Scaled: Building a Sustainable Content Strategy Practice*

“Meghan calls her book a toolkit and I cannot think of a more apt description. It’s a wildly useful set of examples, techniques, and activities you can use immediately. I’ve been doing the content strategy thing for many years and looking through her book still makes me go, ‘WHOA.’”

—Keri Majjala
Content Design leader at LinkedIn and the second person Meghan followed on Twitter

“I don’t think I’ve ever come across a book as useful and helpful as this one. Meghan Casey’s superpower is breaking down incredibly hard, complex work into clear methods and instructions you can put to use right away. If you’re a content pro, you’ll find yourself coming back again and again.”

—Michael Metz
Founder, Leading Like You and co-author,
Writing Is Designing: Words and the User Experience

“*The Content Strategy Toolkit* is on my shortlist of essential content design and strategy books based on its sheer utility. If you’ve got a content problem and don’t know where to start, jump into Meghan Casey’s book and you’re sure to find your starting point. The second edition includes practical info to help you navigate even more content strategy challenges.”

—Kate Agena
PhD, content design and strategy leader at McAfee

“The path from content strategy to great, meaningful content can seem mysterious and daunting. The first edition of *The Content Strategy Toolkit* was the road map we had been waiting for. The second edition takes us even further. 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. And then we’ll all get to benefit from better content in the wild.”

—Erika Hall
Author of *Just Enough Research and Conversational Design* and co-founder of Mule Design

“Meghan’s only gone and done it again. The magic of *The Content Strategy Toolkit* is that it makes the theoretical practical, and this edition takes that even further with ready-to-use digital tools. The first book was a total must-have for every content and UX person’s bookshelf, and this kit of excellence needs to be pride of place just next to it.”

—Candi Williams
Content Design Leader

“The first version of *The Content Strategy Toolkit* helped me show up as a pro early in my career. Version 2’s enhanced focus on cross-functional collaboration makes it an even more practical and tactical investment for anyone aspiring to grow as a content design and strategic leader.”

—Aladrian Goods
Content Design Manager, Intuit

“*The Content Strategy Toolkit* is a staple in the go-to library of content strategists the world over, and for good reason. Through her extensive efforts, Meghan has synthesized multiple careers’ worth of experience into a single, referenceable utility that is focused on immediately actionable learnings. It jump-starts the reader into productivity in the shortest possible time. It’s a strategic buy for the aspiring or experienced content strategist.”

—Noz Urbina
Founder and Omnichannel Strategist, Urbina Consulting & OmnichannelX

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

Meghan Casey

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*For Kai, Riu, Zulmira, Alula, Egypt, Mason, and Javonna...
you deserve a better world.*

TABLE OF CONTENTS

Acknowledgments	xvi
About the Author	xviii
Introduction	xix

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 Planning Tips and Templates	8
Content Strategy Tool 1.2	
A Super Simple User Test	9
Set Up Your Experiments	10
Don't Forget People and Process	13
Content Strategy Tool 1.3	
People and Process Mini-Assessment	14
Turn Problems into Opportunities	15
Ready? Let's Go	16
2 CONVINCING LEADERS AND GET THE RESOURCES	17
Think Like a Business Person	18
Quantify the (Missed) Opportunities	18
Calculate the Risks	20
Consider Non-Monetary Costs	21
Make Your Argument	22
Content Strategy Tool 2.1	
Making the Case Presentation Starter Deck	23
Claim	23

Grounds	23
Warrant	24
Backing	24
Qualifier	24
Rebuttal	25
The Ask	25
Ready for Action?	25

II ► SET UP FOR SUCCESS

3 GET STAKEHOLDERS ON BOARD 29

Stakeholder Roles and Types	30
Roles	30
Types	31
Your Stakeholders	32
List and Label	32
Content Strategy Tool 3.1	
Stakeholder Matrix	33
Craft Your Approach	33
Keeping Stakeholders in the Loop	36
Content Strategy Tool 3.2	
Stakeholder Communications Plan and Templates	37
All Aboard	38

4 ASSEMBLE YOUR CROSS-DISCIPLINE TEAM 39

Pick Your Team	40
Determine the Expertise You Need	40
Match Expertise with People	44
Content Strategy Tool 4.1	
Roster and Responsibilities Template	45

Kick Off Your Project	46
Plan Your Kickoff Meeting	47
Content Strategy Tool 4.2	
Kickoff Agenda and Exercises	49
Spotlight on Terminology Alignment	50
Spotlight on Process Definition	51
Spotlight on Team Norms	53
Kick Off for Clarity	55
Group Decision-Making	56
Ground Rules	57
Facilitative Listening	57
Ready to Work	58

5 PREPARE FOR CHANGE 59

What Makes Change So Hard?	60
Fear About Productivity and Performance	60
Fear of Being Ignored	61
Fear of Unnecessary Upheaval	61
Fear of Losing Control or Being “Found Out”	62
Fear That the Proposed Change Is Unrealistic or Impossible	62
An Approach to Preparing for Change	63
D Is for Define	64
A Is for Anticipate	65
I Is for Introspect	65
S Is for Speak	66
Y Is for Yield	66
Content Strategy Tool 5.1	
The DAISY Framework for Content Transformation	68
You Can’t Manage Change	69

III ► DIG IN AND GET THE DIRT

6 UNDERSTAND YOUR BUSINESS ENVIRONMENT 73

Define the Inquest	74
Internal Factors	74
Content Strategy Tool 6.1	
The Business Model Canvas	75
External Factors	78
Content Strategy Tool 6.2	
Competitive Content Analysis Guidance and Template	79
Get the Goods	81
Interviewing Stakeholders	81
Planning the Interviews	82
Content Strategy Tool 6.3	
Stakeholder Interview Guide	82
Structuring the Interview	83
Conducting the Interviews	84
Reviewing Documentation	84
Content Strategy Tool 6.4	
Insights Engine	85
Open for Business	86

7 LEARN ABOUT YOUR AUDIENCE AND USERS 87

What You Want to Know and Understand	88
Market Research vs. User Research	88
Questions and Gaps	90
Content Strategy Tool 7.1	
User Understanding Matrix	92
Your Approach to User Research	93
Assessing Appetite	93

Proposing an Approach	94
Doing the Research.	95
Content Strategy Tool 7.2	
User Understanding Workshop Activities	99
Nice to Know You, Users	100
8 GET FAMILIAR WITH YOUR CONTENT	101
The Content Ecosystem	102
Step 1: Make a List	103
Step 2: Document the Details	105
Content Strategy Tool 8.1	
Content Ecosystem Mapping Guide	106
Visualize the Ecosystem.	107
Content Snapshots.	109
Inventories.	111
Content Audits	113
Content Strategy Tool 8.2	
Sample User Tests.	117
Content Conscientiousness	118
9 EVALUATE YOUR PROCESSES	119
Right People, Right Skills, Right Work	120
How to Assess Leadership and Culture	120
How to Assess Capabilities	121
Content Strategy Tool 9.1	
Process Assessment Guide	124
Role Clarity and Decision-Making Authority	124
How to Assess Role Clarity	125
How to Assess Decision-Making Authority	126

Standards, Guidance, and Enablement	127
First, Some Definitions	128
How to Assess Standards, Guidance, and Enablement	128
Built-in Collaboration and Iteration	129
Collaboration and Iteration Examples	129
How to Assess the Way Collaboration and Iteration are Built Into Your Processes	130
Process Evaluation Status Complete	131

IV ► ARTICULATE YOUR STRATEGY

10 ALIGN ON A STRATEGIC FOUNDATION 135

Running a Strategic Alignment Workshop	136
Exercise 1: Levels of Why	136
Exercise 2: Look of Success	140
Exercise 3: Audience Characteristics	140
Exercise 4: The MadLib	142
Content Strategy Tool 10.1 Strategic Alignment Workshop Guide	143
Preparing a Strategic Alignment Summary	143
Organize for Clarity and Action	145
Analyze and Synthesize	149
Content Strategy Tool 10.2 Strategic Alignment Summary Starter Document	150
Getting to the Strategy	151
Discovery: That's a Wrap	152

11 SET YOUR CONTENT COMPASS 153

Content Compass Scope	154
Function	154

- Property 155
- Subset 156
- Content Compass Components 156
 - Articulate Your Content Purpose. 156
 - How Do You Document Your Core Purpose? 157
 - How Do You Craft Your Content Purpose? 159
 - How Do You Use Your Content Purpose? 160
- Create Your Messaging Framework 162
 - What Does a Messaging Framework Look Like? 162
 - Content Strategy Tool 11.1
 - Messaging Framework Template 162
 - How Do You Develop a Messaging Framework? 164
 - How Do You Use Your Messaging Framework? 165
- Define How You'll Measure Success 165
 - How Do You Decide What to Measure? 166
 - Let's Define Some Terms 166
 - Choose the Right Metrics 166
 - How Do You Document What You'll Measure? 169
- How Do You Use Your Measurement Framework? 170
 - Document How Content Is Performing 171
 - Report to Stakeholders. 171
 - Content Strategy Tool 11.2
 - Content Measurement Framework and Scorecard Template. 173
- True North. 173

V ► DESIGN YOUR CONTENT

12 PRIORITIZE BASED ON YOUR STRATEGY 177

- Methods for Prioritizing Content 178
- Two-Question User Survey 178

Top Tasks Identification	179
Search Intent Analysis	182
Topic Sorting	186
Documenting Content Priorities	187
Content Strategy Tool 12.1	
Content Prioritization Templates	187
Light the Way	189
13 ORGANIZE FOR INTUITIVE WAYFINDING	191
Sitemaps	192
Building Your Sitemap	194
Iterating Your Sitemap	197
Internal Iteration	198
Content Strategy Tool 13.1	
Sitemap Evaluation Working Session Exercises	200
User Testing	201
Taxonomy	202
Documenting Your Taxonomy	203
Content Strategy Tool 13.2	
Taxonomy Documentation Template	205
Iterating on Your Taxonomy	205
Organized and Ready	206
14 DEFINE THE CONTENT EXPERIENCE	207
Formulating the Content Experience	208
User Journeys and Pathways	213
The Core Model	217
Content Strategy Tool 14.1	
Collaborative Design Studio Workshop Plan	224

Documenting the Content Experience	224
Content Strategy Tool 14.2	
Content Experience Documentation Templates	229
Testing the Content Experience	229
Methodology Details	231
Using Your Findings to Iterate.....	234
Defined, Designed, and Refined	234

15 SPECIFY CONTENT STRUCTURE AND REQUIREMENTS 235

Specifying Content Structure	236
Structured Content Primer.....	236
Structured Content and the Content Experience	237
Structured Content and the Author Experience	240
Structured Content and Content Modeling	242
Content Strategy Tool 15.1	
Content Modeling Tutorial for Content Professionals	246
Getting Specific About Content	247
Page-Level Content Specifications	247
Content Strategy Tool 15.2	
Content Specifications Templates and	
Pair Writing Resources	250
Content Mapping	250
The Best-Laid Plans.....	251

VI ► IMPLEMENT AND EVOLVE

16 DEFINE HOW YOU’LL GOVERN YOUR CONTENT 255

Content Strategy Tool 16.1	
Governance Definition and Documentation Guide.....	256
The Content Life Cycle.....	257

Who Makes What Decisions	258
Responsibilities of Strategic Decision-Makers	259
Role of the Content Council	262
Responsibilities of Implementation Decision-Makers	263
Decision-Making Process	266
Strategic Content Planning	266
Editorial Planning	268
Approach to Content Ownership	271
Smart Decision-Making, Facilitated	274
17 BUILD OUT YOUR CONTENT PLAYBOOK	275
Content Playbook Overview	276
Content Strategy Tool 17.1	
Content Playbook Outline and Examples	277
Content Standards and Guidance	277
Content Enablement	279
Content Playbook Examples	280
Content Creation People and Process Documentation	280
Roles and Responsibilities	280
Process	281
Maintenance Process Example	284
Style Guide and Content Creator Training	285
Style Guide and Best Practices Training Program	292
How's It Going at the Internet Society?	294
Farewell, Content Friend	294
Appendix: List of Tools	295
Index	305

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Before we move on, so many people who have had an impact on my life and career fall into multiple categories and, well, writing acknowledgments is hard. Especially for someone who worries *a lot* about not making anyone feel left out.

Okay, on to an amazing group of friends, colleagues, teachers, and authors I have had the privilege to meet, learn from, and work with throughout my career . . . Natalie, Candi, Brittney, Jordan, Malaika, Aladrian, Amber, Marchaé, David, Keri, Rebekah, Chris, Jane, Lisa Maria, Corey, Michael, Andy, Scott, Mary Ann, Callie, Julie, Christine, Erin, Jodi, Noz, Eileen, Eaton, Oriana, Katie, Rosie, Lauren, Jennifer, Akilah, and so many more.

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Then, there's just a full-on consortium of family and friends who have offered their encouragement, believed in me, inspired me, or cared for me . . .

To my best gym pals Traci, Katherine, Robin, and Hannah.

To my sisters, Jackie and Erin, the middle sister loves you and appreciates you more than she could ever put into words. Ironic, huh?

To the rest of my immediate and extended family—Bill, Katie, Jake, Lizzie, Sean, Tanya, Evelyn, Carrol, Alan, Rachel, Maddie, Kyle, Hank, and Olivia—I’m glad to love and be loved by you.

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To my chosen family—Zedé, Degen, Zulmira, Alula, Maddie, Courtney, Mason, Debbie, Javonna, Al, David, Davion, Tawakoni, Naida, Dakotah, Dom—I just really can’t imagine life without any of you.

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Thanks 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 material in praise of the book.

And last, but not least, thanks to the entire team at Peachpit. Extra especially, my deepest thanks to my absolutely amazing development editor Robyn Thomas. When Laura asked if I wanted to work with her again, it took me all of a nanosecond to say “YES!” Thank you for keeping me grounded and validating that my well-being, the well-being of my loved ones, and the well-being of my community deserve to be prioritized.

ABOUT THE AUTHOR



Meghan Casey owns Do Better Content Consulting. She helps a wide variety of clients—from startups, nonprofits, colleges and universities, Fortune 50 companies, and everything in between—solve the messy content problems most organizations encounter every day.

Meghan has also helped several agencies and clients build their capacity to do content strategy. Perhaps her proudest moments are when content strategy practitioners tell Meghan that the first edition of this book helped them launch their content strategy career, tackle a difficult content project, or get a promotion.

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.

INTRODUCTION

Hi. I'm glad you picked up this book. I wrote the first edition because I had often wished for a playbook to help me solve my clients' content problems. There is a ton of great stuff out there, but I wanted it all in one place.

I should probably level set how I think about content strategy. This tried-and-true definition is still a go-to when I'm talking with people who already kinda get it.

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

—Kristina Halvorson

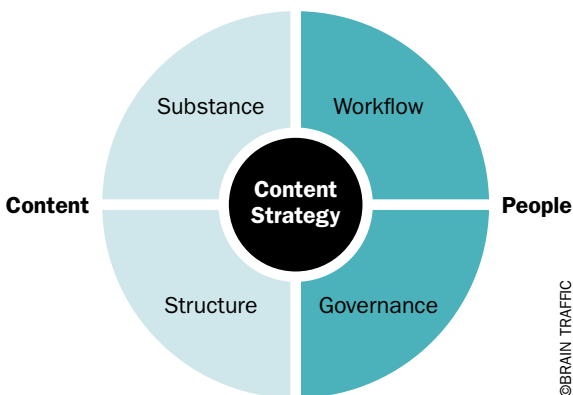
President of Brain Traffic and author of *Content Strategy for the Web*

When I'm talking with people outside the various digital disciplines (like my clients' stakeholders or my brother Bill), I'll often say something like:

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, and then guides planning for the creation, distribution, and maintenance of that content.

I'm still a fan of the original content strategy “quad” introduced by Brain Traffic way back in 2009:



While Brain Traffic has updated the quad a couple times since then, I still think it makes sense in the context of this book. It binds together everything that goes into creating successful content experiences with the content purpose at the center.

Surrounding the content purpose 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 distribution to ongoing maintenance.
- **Governance** details how the organization makes decisions about content to ensure that it's on-strategy.

As you work your way through *The Content Strategy Toolkit*, keep in mind that this book is not meant to tell you everything you should do on your project and how to do it—although it just might work out that way. It does offer you some proven instruction, tools, and templates that you can use as is or adapt for your needs. 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 tweak them based on your own experience and situation. Please tweak them freely! And share how you tweaked them! And maybe even write the next book!

WHY A SECOND EDITION?

A couple years ago, my acquisitions editor Laura Norman asked me if I wanted to write a second edition. At that time, I didn't think I had anything new to say. So I declined and went about my business.

But the more I thought about it, the more I realized I did have more to say. As the field evolves, so does my practice. As I have taken on new types of projects and collaborated with new people, my content strategy horizons have expanded. (I mean, I never would have thought two years ago that one of my favorite parts of my job would be collaborating with back-end developers on content modeling. But it is!)

So, what's new? Along with refreshes of content from the first edition, there's a bunch of new stuff, including:

- A new chapter about assembling your cross-discipline team
- A new chapter on preparing your organization for content-related change

- A whole section on content design versus one chapter
- A new chapter on building a content playbook
- Some new tools like the Content Operations Assessment Guide
- Workshop exercises, some old and some new, that you can immediately use in Miro or Mural
- An *extensive* Airtable database with so many tabs (thanks to my friend and colleague Jane Newman for collaborating on this!)

I'm really geeked. And I hope you are, too!

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 always learning
- A manager building a content strategy team
- A designer, developer, marketer, or communicator who wants to make content strategy a part of your process
- A project manager who will be working with a content strategist for the first time and wants to understand what it is we do and how to build it into their project plan
- An educator teaching a class on digital design and content
- A family member or friend who doesn't know what the heck I do, but is proud of me for writing a book

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 starting playbook for your project (in fact, my friend and fellow content strategy practitioner Scott Kubie suggested I call this edition *The Content Strategy Playbook*). Just keep in mind that you may need to adapt or pivot.

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 these examples:



HINT These usually provide you with information on where to find additional resources or other things you might consider.



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

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 stand out when you flip through the book. Here's an example:



CONTENT STRATEGY TOOL 8.1

CONTENT ECOSYSTEM MAPPING GUIDE

Download the guide and spreadsheet/Airtable template to document your content properties and types and relevant details about them.

TIPS

- Some of the stuff in Scott's guide is more relevant to the next chapter on content processes. Feel free to start documenting it now.
- Include everything you think might be relevant (rather than leave something off).
- Modify the information you include to match your project needs.
- You might find content that no one knows anything about, which makes you a hero in my book. If you found it, their audiences might too.

WHERE TO GET IT

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

WHERE IT CAME FROM

Scott Kubie (www.kubie.com) & Meghan Casey (www.dobettercontent.com)

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

You must register your purchase on peachpit.com in order to access the tools:

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- 3 Click Submit.
- 4 Answer the question as proof of purchase.
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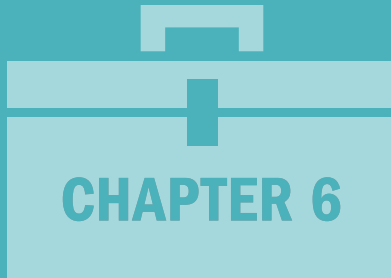
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ONE LAST THING

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!



UNDERSTAND YOUR BUSINESS ENVIRONMENT

I'm wrapping up a project with a client that has a very complex product architecture, especially compared with their competitors. Things that are features of competitors' products are products unto themselves with separate subscriptions. It's really confusing. And my colleague and I have asked a lot of questions to make sense of it all.

Some of the stakeholders don't understand why the folks working on the content would care . . . we have to figure out how to organize and write about the products, right? Turns out, it matters quite a lot. Oftentimes, those of us who create content or build the experiences in which content is the central focus don't get the opportunity to ask such questions. And that missed opportunity is part of the reason our websites, applications, and so on are in such rough shape.

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

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

Let's dig in to how you can gather, synthesize, and analyze all these things!

DEFINE THE INQUEST

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

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

INTERNAL FACTORS

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

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

CONTENT STRATEGY TOOL 6.1

THE BUSINESS MODEL CANVAS

Download my content-focused version of The Business Model Canvas to start pulling together information about how your company makes and spends money.

**TIPS**

- Stick the canvas in Miro, Mural, or a digital white-board tool of your choice to start gathering information as you uncover it.
- Make the template canvas your own by including additional or different information that makes sense for your project.
- Pass it around to your team and other stakeholders to fill out, and then analyze whether everyone has the same understanding of your business model.

WHERE TO GET IT

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

WHERE IT CAME FROM

Strategyzer (<http://strategyzer.com>) for the base template; Meghan Casey (www.dobettercontent.com) for the content edition

DIRECTION

The Direction category is all about what the company or organization is prioritizing currently. This category has a lot of overlap with the other categories. I'm including it in the second edition because I kept adding direction as a separate category while synthesizing all my insights on projects.

- Why does the company or organization exist?
- What are the company's or organization's short- and long-term goals?
- What strategies have been defined to achieve them?
- Is there clarity about the desired objectives or outcomes for those goals and strategies?

- What projects and larger efforts are underway to help achieve short- and long-term goals?
- Does the project you're working on tie in with other projects and efforts?
- Where is the company or organization investing in hiring and capabilities?
- Does the company's budget reflect the stated strategies, goals, and desired outcomes?



TIP For a great, easy-to-understand primer on vision, mission, goals, strategy, and objectives, head over to www.braintraffic.com/insights/what-is-strategy-and-why-should-you-care and read Kristina Halvorson's article "What Is Strategy (and Why Should You Care)?"

OFFERINGS

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

- What products, services, or other commodities do you offer?
- What's the history behind each offering (for example, how long has it been available, and why did you choose to offer it)?
- What is the offering life cycle like (for example, how long is an offering available, and what determines whether to continue it)?
- What marketplace need do your offerings fill?
- How would you describe the value proposition for each of your offerings?
- How often do you create new offerings?
- How do you decide what new offerings to provide?
- What's the typical time to market (for example, how long does it take for an idea to become a reality) for your offerings?
- What goals have you set around your offerings for the next year?

CUSTOMERS

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

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

REVENUE

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

- How do you sell your offerings (direct to consumer, business to business, and so on)?
- Through what channels do you sell your offerings (point of purchase or service, online, telemarketing, and so on)?
- In what markets do you sell your offerings, and how do you prioritize them?
- If you sell through multiple channels, which are the most successful and which are your priority (for example, do you attract more visitors to your website versus a social media account, or is your target audience more likely to use your mobile app versus your .com site)?
- How do you prepare sales staff, associates, and so on to talk about your products?
- Do you get any post-sale revenue (royalties, service contracts, and so on)?

- What is the sales cycle like for your offerings (for example, how long does it typically take, and what steps are involved from lead to sale)?
- What do you know about why prospective customers choose (or don't choose) your offerings?
- What ratio of leads converts to a sale?
- What are your revenue goals in each sales channel for the next year?

EXPENDITURES

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

- What investments in technology, including your website, do you have planned?
- How do you make decisions about technology investments or enhancements, such as switching platforms or content management systems?
- Do you want the content strategy recommendations to fit within any technology restraints, or are you open to recommendations that might require a change in technology?
- How are sales professionals compensated?
- What are your expenditures for providing customer support (for example, do you use a call center vendor; do you maintain a knowledge center)?
- On average, how much do you spend on each customer to get the sale and provide support?
- Have you set any business goals related to expenditures for the next year?

EXTERNAL FACTORS

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

COMPETITORS

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

- Who do you see as your direct competitors for your products and services?
- How are your direct competitors better or different than you?
- Why do you think your prospective customers choose your competitors over you?
- How do your competitors' talk about their products, services, and other offerings?
- What's the state of their content?
- Who is seen as an expert source of information about your industry and offerings?
- **Content Strategy Tool 6.2: Competitive Content Analysis Guidance and Template** is a new tool in this edition that gives you guidance and a template for conducting an analysis of competitors' content.

CONTENT STRATEGY TOOL 6.2

COMPETITIVE CONTENT ANALYSIS GUIDANCE AND TEMPLATE

Download the instructions and templates for recording your observations (yep, there's an Airtable version) and reporting your findings.

TIPS

- There's value in looking at direct competitors and businesses/organizations whose approach to content you admire even if they don't do what you do.
- Be clear up-front about what you will look at: their website, their social channels, their blog, or some or all of the above.
- Always include a set of opportunities or further inquiries you recommend when you report your findings.

WHERE TO GET IT

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

WHERE IT CAME FROM

Lots of people: Adrienne Smith (www.adrienneksmith.com), Meghan Casey (www.dobettercontent.com) with Airtable support from Jane Newman



LEGAL, COMPLIANCE, AND REGULATIONS

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

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

TRENDS AND CURRENT EVENTS

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

- What's going on in the industry that affects or might affect your business?
- What changes in the business environment are you aware of that might affect what you offer or how you position what you offer?
- In what ways have current events, such as natural disasters, elections, celebrity news, high-profile crimes, and so on, affected your business in the past?
- What's your process for updating positioning, content, and so on if a trend or current event necessitates it?

CUSTOMERS

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

- How do your prospective customers shop for or make decisions about your products and services?
- What or who influences your prospective customers' decisions about the products and services you offer?
- What do your prospective and current customers care most about in the products or services you offer?
- How do your prospective and current customers want to interact with you?
- What kind of content do your prospective and current customers expect from you?
- What is a typical customer life cycle like?

GET THE GOODS

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

INTERVIEWING STAKEHOLDERS

Use your stakeholder matrix and start setting up 30-minute to one-hour meetings with each of your stakeholders. You may be tempted to interview some people in groups to save time. I usually recommend against that approach because you may not get the most straightforward answers. Use your best judgment. You can always follow up with people later if you think they held back.

**TIP**

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

PLANNING THE INTERVIEWS

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

The stakeholder matrix is also a great starting point for putting together a stakeholder discussion guide or checklist. I usually create a master interview guide with questions on all the topics and then chop it up for each stakeholder, depending on what makes the most sense to ask them. **Content Strategy Tool 6.3** is an example discussion guide from Kim Goodwin, author of *Designing for the Digital Age* (Wiley, 2009).

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



CONTENT STRATEGY TOOL 6.3

STAKEHOLDER INTERVIEW GUIDE

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

TIPS

- Create a master stakeholder guide to ensure you've got all the topics and questions covered. Then, break it up for each stakeholder or groups of similar stakeholders.
- Include the goals of the interviews on all versions as a reminder for yourself and as talking points when you kick off each interview.
- Make the interview guide your own by breaking it into topics or sections, adding or subtracting questions, making notes that prompt you, or including the details about each interviewee (whatever you need for it to be useful).

WHERE TO GET IT

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

WHERE IT CAME FROM

Kim Goodwin, *Designing for the Digital Age* (Wiley, 2009)

STRUCTURING THE INTERVIEW

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

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

OBJECTIVE QUESTIONS

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

- What’s your role at *company*?
- What do you know about this project?
- What are your team’s top goals and objectives for this year?

REFLECTIVE QUESTIONS

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

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

INTERPRETIVE QUESTIONS

Use interpretive questions that reveal the stakeholder’s view of issues outside their role or team, such as the company at large, the industry, or the customers. Examples include:

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

CONDUCTING THE INTERVIEWS

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

First, focus on listening. Avoid trying to fill silences. Resist the urge to jump in with your own insight because you think it will make you sound smart. (I do that. Don't do that.) And avoid scurrying past a topic because at first it seems the stakeholder doesn't have much to say. Let the interviewee think. Some of the best insights come after a long silence.

Second, whenever possible, have someone along who can take fairly verbatim notes for you. Or record the conversation with a tool that provides transcripts. That's not to say you shouldn't take any of your own notes. I almost always jot down a few things that stood out to me. But it's easier to have an authentic conversation if you're not trying to write down every word and facilitate the discussion.

And finally, pay close attention when stakeholders mention something or someone you have not heard of before. I'll often hear a name mentioned repeatedly, and I immediately think *hidden stakeholder!* Or someone mentions a project that I don't think my client has any idea is happening and has a direct impact on the work I'm doing. And sometimes, someone will mention something like the 2015 digital roadmap that I have not seen or heard about.



TIP As soon as possible after each interview, write up three to five key takeaways.

REVIEWING DOCUMENTATION

Reviewing documentation, such as strategy presentations, site analytics data, creative briefs, organizational charts, brand guidelines, or user research reports, often can seem quite aimless. Following the two-step process I've outlined can help add some structure and order to your documentation review. **Content Strategy Tool 6.4** is an Airtable database (and spreadsheet) dubbed "Insights Engine" that you can use to inventory the documents and record your insights.

CONTENT STRATEGY TOOL 6.4

INSIGHTS ENGINE

Use the Insights Engine Airtable tables or spreadsheet to document insights gathered from interviews and documentation.

TIPS

- You can set up whatever topics you want. And you may want to have two topic columns in cases where you need a subtopic for better classification.
- Write in a professional manner so that you can share the document with your client if needed or even lift notes verbatim for your deliverables.
- Make sure you call the source documents what your clients call them or refer to them by filename to avoid confusion regarding the source of an insight.

WHERE TO GET IT

Get the Airtable version or spreadsheet version at www.peachpit.com/register.

WHERE IT CAME FROM

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



INVENTORY THE DOCUMENTS

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

- **Strategy**—Often these are presentations that outline what the company or a department within the company is trying to achieve and the actions or projects it's pursuing to do so.
- **User information**—This includes items such as user or market research reports, usability testing data, personas, and customer demographic information.
- **Analytics**—Mostly, analytics relate to conversion rates, site visits, page views, user paths on a website or application, and so on. Additional examples include call center data and data around cost per sale.
- **People and process**—Documents I might review in this category include organizational charts and process maps for content planning, sourcing, creating, and publishing.

With those categories in mind, I have a better idea of what kind of information I can expect to glean from each document. It's also a good way to validate with



TIP

I always ask my clients to send me everything they think might be relevant. I'd rather look at something and decide I don't need it rather than find out later I missed something important.

your client or business partner that you have all the relevant information; seeing the spreadsheet might spark additional ideas for things you should review.

REVIEW AND RECORD

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

I create a spreadsheet (now usually an Airtable) with the following columns:

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

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

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

Trust me, the Insights Engine will come in super handy when you're putting all you've learned and analyzed together to set up for strategic alignment. You'll be able to filter your insights to discover patterns. It'll be awesome.

OPEN FOR BUSINESS

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

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



TIP

You can use the Insights Engine for interview takeaways and insights, especially if you plan to type them anyway. Your source is just the person you talked with. If you use the Insights Engine for recording, include another column for Source Type so you can easily separate interviews from documents if you need to.

INDEX

A

- A (Anticipate) in DAISY Framework 65
 - Aalen, Ida 218
 - accessibility
 - discipline 41
 - and inclusivity 11
 - style guide 291
 - “accessible” heuristic 168
 - The Accidental Taxonomist* 205
 - acronyms, style guide 289
 - action and clarity, organizing for 145–149
 - Activity Matrix Sample 53
 - Airtable database 8, 169
 - aligned autonomy 120
 - analysis capability 121
 - analytics
 - and instrumentation 42
 - metrics 167
 - Analytics Research Plan 12
 - analytics review 8–9
 - approve, decentralized approach 272
 - argument model 22
 - Atherton, Mike 236
 - attitudes and beliefs 89
 - audience, audit criteria 11
 - Audience Characteristics
 - exercise 140–141
 - audio/visual production 41, 44, 122
 - audit criteria 10–13
 - Audit Planning Tips and Templates 8
 - Audit Spreadsheet 113, 169
 - audit template workbook 296
 - audits. *See* content audits
 - author experience design capability 122
 - authored versus reference 243
- ## B
- back-end development discipline 43–44
 - backing, including in argument 22, 24
 - Baggs, Rebekah 182
 - Barker, Deane 236
 - behaviors, researching 90
 - beliefs and attitudes 89
 - best practices 167–168
 - Brain Traffic
 - Process Assessment Guide 124
 - User Understanding Matrix 92
 - brainstorm, triggering 97
 - brand discipline 41
 - business analysis discipline 42
 - business environment
 - The Business Model Canvas 75
 - competitors 79
 - customers 80
 - Customers category 77
 - Direction category 75–76
 - Expenditures category 78
 - external factors 78–81
 - internal factors 74–78
 - legal, compliance, and regulations 80
 - Offerings category 76
 - Revenue category 77–78
 - reviewing documentation 84–86
 - trends and current events 80
 - Business Goals and Content
 - Objectives 146
 - The Business Model Canvas 74–75, 298
 - business person, thinking like 18
- ## C
- calculating risks 20–21
 - capabilities, assessing 121–124
 - centralized model, content
 - ownership 271–272
 - champions 30, 32, 34
 - change
 - difficulties of 60–63
 - preparing for 63–68
 - change fatigue 61
 - change management discipline 43
 - checklists and feedback forms 283–284
 - claim, including in argument 22–23
 - clarity, audit criteria 11

- clarity and action, organizing for 145–149
- “clear” heuristic 168
- CMS (content management system)
 - 112, 125
- collaboration and iteration 129–131
- Collaborative Design Studio Workshop
 - Plan 224, 302
- communication, team norm 53
- “communicative” heuristic 168
- communities of practice 263–265
- Competitive Content Analysis Guidance and
 - Template 79, 298
- Competitors category, business 79
- Compliance category, business 80
- comprehension and readability, content
 - audits 118
- concerns, researching 89
- consult, centralized approach 273
- content. *See also* prioritizing content
 - addressing wrongness of 7–10
 - analytics review 8
 - classifying 202–206
 - hypothesizing wrongness of 6–9
 - page-level specifications 247–249
 - standards and guidance 277–279
 - user testing 8–9
- “Content & Cash: The Value of Content
 - (Cape Town Edition)” 20
- Content Assessment Hypotheses and
 - Methods 10
- content audits 7–11, 113–118
- content capabilities, assessing 121–124
- content compass components 156–161
- content compass scope
 - function 154
 - property 155
 - subset 156
- content council, role of 260–262
- content creation process 281–284
- content creator training 285–294
- content design
 - capability 121
 - discipline 41, 44
- content distribution discipline 43
- content ecosystem
 - documenting details 105–109
 - making a list 103–104
 - mapping guide 106–107, 299
 - overview 102
 - project scope examples 104
 - visualizing 107–109
- content enablement 122, 279
- Content Engagement 148
- content experience
 - Core Model 217–223
 - documenting 224–229
 - formulating 208–213
 - journey mapping 215–216
 - methodology details 231–233
 - pathway mapping 216–217
 - testing 229–234
 - user journeys and pathways 213–217
- Content Experience Documentation
 - Templates 302
- Content for Cancer case study 218–223
- content life cycle 257–258
- content mapping 115, 250–251
- Content Measurement Framework and
 - Scorecard Template 301
- content modeling 242–246
- “Content Modeling: The Translation Layer
 - Between Teams” 244
- Content Modeling Tutorial for Content
 - Professionals 303
- content operations 50–51
- content ownership 271–273
- content performance, documenting 171
- content playbook
 - feedback forms and checklists 283–284
 - maintenance process example 284–285
 - overview 276–279
 - process 281–282
 - roles and responsibilities 280–281
 - style guide 285–294
- Content Playbook Outline and
 - Examples 304
- content priorities
 - documentation 187–189
 - search intent analysis 182–185

- Top Tasks analysis 179–182
- topic sorting 186
- two-question user survey 178–179
- Content Prioritization Templates 301
- content purpose
 - articulating 156–157
 - crafting 159–160
 - using 160–161
- content snapshots
 - overview 109–110
 - website inventories 110–113
- content specifications, page-level 247–249
- Content Specifications Templates and Pair Writing Resources 250, 303
- content strategy
 - discipline 41, 44
 - and governance 256
 - implications for 149
- Content Strategy for the Web* 249
- Content Strategy Tools
 - Audit Planning Tips and Templates 8, 296
 - The Business Model Canvas 75, 298
 - Collaborative Design Studio Workshop Plan 224, 302
 - Competitive Content Analysis Guidance and Template 79, 298
 - Content Ecosystem Mapping Guide 106, 299
 - Content Experience Documentation Templates 229, 302
 - Content Measurement Framework and Scorecard 301
 - Content Measurement Framework and Scorecard Template 173
 - Content Modeling Tutorial for Content Professionals 246, 303
 - Content Playbook Outline and Examples 277, 303
 - Content Prioritization Templates 187, 301
 - Content Specifications Templates and Pair Writing Resources 250, 303
 - The Daisy Framework for Content Transformation 68, 298
 - Governance Definition and Documentation Guide 256, 303
 - Insights Engine 85, 298
 - Kickoff Agenda and Exercises 49, 297
 - Making the Case Presentation Starter Deck 23, 296
 - Messaging Framework Template 162, 301
 - People and Process Mini-Assessment 14, 296
 - Process Assessment Guide 124, 300
 - Roster and Responsibilities Template 45, 297
 - Sample User Tests 117, 299
 - Sitemap Evaluation Working Session Exercises 200, 302
 - Stakeholder Communications Plan and Templates 297
 - Stakeholder Interview Guide 82, 298
 - Stakeholder Matrix 33, 297
 - Strategic Alignment Summary Starter Document 150, 300
 - Strategic Alignment Workshop Guide 143, 300
 - A Super Simple User Test 9, 296
 - Taxonomy Documentation Template 205, 302
 - User Understanding Matrix 92, 299
 - User Understanding Workshop Activities 99, 299
- content structure
 - author experience 237, 240–242
 - content experience 237–240
 - content modeling 242–246
 - primer 236–237
 - specifying 236
- content style guide 285–294
- content type 103
- content wireframe 247
- “controllable” heuristic 168
- conversation tracking 58
- Corak, Chris 182
- Core Model 217–223
- core purpose, documenting 157–158

costs, non-monetary 21
 Covert, Abby 167–168
 Crazy Egg tool 178
 create, content life cycle 258, 278
 “credible” heuristic 168
 CTA (call to action) 161
 Cultural Iceberg Model 136
 culture, assessing 120–121
 Current Events category, business 80
 Customers category, business 77, 81
 customized versus locked down in 243–244

D

D (Define) in DAISY Framework 64
 DAISY Framework 63–68, 298
 decentralized model, content ownership 271–272
 decision makers
 content council 260, 262
 examples 30, 32, 34
 implementation 259, 263–265
 strategic 259–262
 decision-making
 authority 126–127
 in groups 56
 process 266–271
 define, content life cycle 258, 278
 “delightful” heuristic 168
 derailers 31–32, 34
Design for Cognitive Bias 212
Designing Connected Content: Plan and Model Digital Products for Today and Tomorrow 236
Designing for the Digital Age 82
 Diamond of Participatory Decision-Making 56
 Direction category, business 75–76
 disagreements, dealing with 58
 documentation, reviewing and recording 84–86
 drawing people out 57
 Dunbar, Natalie 45

E

editor, content playbook 280
 editorial and audio/visual production 41, 44
 Editorial Checklist 284
 editorial essentials, style guide 286
 editorial planning 268–271
 Edwards, Matt 98
 enablement
 assessing 128–129
 with guidance and standards 279
 Event Level of Why 136
Everyday Information Architecture 24, 194
 evolve, content life cycle 258, 279
 Expenditures category, business 78
 experiences, researching 90
 experiments, setting up 10–13
 expert stakeholders 31–32, 34
 expertise
 determining needs for 40–43
 matching with people 44–45

F

facilitate, decentralized approach 272
 facilitative listening 57–58
Facilitator’s Guide to Participatory Decision-Making 56
 favorability, content audits 118
 fears
 being “found out” 62
 being ignored 61
 losing control 62
 productivity and performance 60
 proposed changes 62–63
 unnecessary upheaval 61
 feedback forms and checklists 283–284
 findability, content audits 116–117
 “findable” heuristic 168
From Solo to Scaled: Building a Sustainable Content Strategy Practice 45
 front-end development discipline 43

G

Gale, Pete, A Super Simple User Test 9
 Goodwin, Kim 82
 Google Analytics 12, 167
 governance and content strategy 256
 Governance Definition and Documentation Guide 256, 303
 GOV.UK 9
 ground rules 57
 grounds, including in arguments 22–23
 group decision-making 56
 guidance
 assessing 128–129
 with standards and enablement 279

H

Hall, Edward T. 136
 Halland, Are 217–223
 Halvorson, Kristina 249, 263
 Hane, Carrie 236
 Hedden, Heather 205
 A Hero's Journey 97–98
 heuristics 167–168
 Hotjar tool 178
 “How to Build Your Community of Practice” 263
How to Measure Anything: Finding the Value of “Intangibles” in Business 20
 Hubbard, Douglas W. 20
 hybrid model, content ownership 271
 hypotheses, testing 6–10

I

I (Introspect) in DAISY Framework 65
I acknowledge. 67
I commit to. 67
 IA (information architecture) 24
 “Iceberg Model: Learn about the Theory and Practice of Systems Thinking” 64, 136–137
 implementation authority 127
 implementation decisions 259, 263–265

implementer stakeholders 31–32, 34
 “inclusive” heuristic 168
 inclusive language, style guide 291
 inclusivity and accessibility, audit criteria 11
 influencers 30, 32, 34
 Ingram, Richard 130
 inquest
 The Business Model Canvas 75
 competitors 79
 customers 80
 Customers category 77
 Direction category 75–76
 Expenditures category 78
 external factors 78–81
 internal factors 74–78
 legal, compliance, and regulations 80
 Offerings category 76
 Revenue category 77–78
 trends and current events 80
 Insights Engine 85, 169, 298
 Internet Society 285–294
 interpretive questions 83
 interview methods 34
 interviewing stakeholders 81–86
 interviews and observation 100
 Intranet Information Architecture Estimate 20
 inventories 111–112
 iteration and collaboration 129–131

J

job description audit 126
 job studies 126
 journey mapping 215–216

K

Kaner, Sam 56
 kick off for clarity 55–58
 kicking off projects 46–47
 Kickoff Agenda and Exercises 297
 kickoff meeting, planning 47–49
 KPIs (key performance indicators) 166, 169

Kubie, Scott
 Content Ecosystem Mapping Guide 106
 making lists 103

L

leadership, assessing 120–121
 “learnable” heuristic 168
 Legal category, business 80
 Levels of Why 136–140
A List Apart 218
 locked down in versus
 customized 243–244
 Look of Success exercise 140

M

MadLib exercise 142
 maintenance process example 284–285
 Making the Case Presentation Starter
 Deck 23, 296
 manage approach 273
 market research 88–89
 Marquis, Lisa Maria 24, 194
 McGovern, Gerry 179
 measure, content life cycle 258, 278
 measurement framework
 analytics 167
 documentation 169–170
 heuristic 167–168
 KPIs (key performance indicators) 166
 metrics 166–167
 objectives 166
 scorecard sample 172–173
 user feedback 169
 using 170–173
 Medicare example 209–213
 meetings, team norm 54
 Mental Model Level of Why 137
 messages, style guide 290
 messaging framework
 creating 162–165
 template 301
 metrics, choosing 166–169
 Metts, Michael 54
 Miro and Mural boards 115, 151

motivations, researching 90
 Myers, Callie 192–193, 197

N

NCS (Norwegian Cancer Society) 218
 Newman, Jane
 Audit Planning Tips and Templates 8
 Competitive Content Analysis Guidance
 and Template 79
 Nielson, Jakob 167

O

objective questions 83
 objectives, defined 166
 observation and interviews 100
 OCUA (Owns, Collaborates, Uses,
 Approves) 53
 Offerings category, business 76
 opportunities
 introducing 147
 problems as 6, 15
 quantifying 18–20
 Optimal Workshop app 201–202
 organizing for clarity and action 145–149
 owner, content playbook 280

P

page tables 247–249
 page-level content specifications 247–249
 pair writing 130, 249
 paraphrasing 57
 pathway mapping 216–217
 Pattern Level of Why 137
 PDM (product data management) 105
 people and process 13–14
 People and Process Mini-Assessment 296
 performance and productivity, fear
 about 60
 Perkin, Neil 120
 Pope, Lauren 8
 Presentation Starter Deck 23, 296
 principled disagreement 58
 principles, team norm 54
 print content inventory 112

- prioritizing content
 - documentation 187–189
 - search intent analysis 182–185
 - Top Tasks analysis 179–182
 - topic sorting 186
 - two-question user survey 178–179
- problems as opportunities 6, 15
- process
 - content creation 281–284
 - and people 13–14
- Process Assessment Guide 124, 300
- process definition 51–53
- process design capability 122
- product management discipline 43–44
- productivity and performance, fear
 - about 60
- project management discipline 43
- project owner 30, 32, 34
- Project Scope Examples 104
- projects, kicking off 46–47
- publisher, content playbook 281

Q

- qualifier, including in argument 22, 24
- questions
 - and gaps 90–91
 - preparing for stakeholder interviews 83

R

- Rach, Melissa 20, 249
- RACI (responsible, accountable, consulted, and informed) 53
- readability
 - audit criteria 11
 - and comprehension 118
- Real World Content Modeling: A Field Guide to CMS Features and Architecture* 236
- rebuttal, including in argument 22, 25
- reference versus authored 243
- reflective questions 83
- Regulations category, business 80
- relevance, content audits 116–117

- research, market vs. user 88–90
- research methods, choosing 100
- Revenue category, business 77–78
- risks, calculating 20–21
- role clarity, assessing 125–126
- Rosenfeld, Lou 167
- Roster and Responsibilities Template 45, 297

S

- S (Speak) in DAISY Framework 66
- Sample User Tests 117
- Sample Website Inventory 110–111
- Scorecard Sample, measurement framework 172
- search intent
 - analysis 182–185
 - and optimization 42, 44
- SEO (search engine optimization) capability 122
- SEO for Everyone* 182
- SERPs (search engine results pages) 182, 184
- silence, dealing with 58
- site crawler, Screaming Frog 112
- Sitemap Evaluation Working Session Exercises 200, 302
- sitemaps
 - building 194–197, 201
 - features 192–193
 - iterating 197–200
 - user testing 201–202
- SME (subject matter expert) 127, 130, 281
- Smith, Adrienne 79
- sources, style guide 289
- Stakeholder Communications Plan and Templates 37, 297
- Stakeholder Dossier Details 34–35
- Stakeholder Interview Guide 82, 298
- Stakeholder Matrix 33, 297
- stakeholder types
 - expert 31
 - implementer 31
 - strategic 31
 - user proxy 31

- stakeholder workshop 97–98
 - stakeholders
 - champions 30
 - communications plan and templates 37
 - crafting approach 33–35
 - decision makers 30
 - derailers 31
 - dossier details 34
 - influencers 30
 - interviewing 34, 81–84, 164
 - keeping in the loop 36
 - listing and labeling 32
 - matrix 33
 - project owner 30
 - reporting to 171–172
 - workshops/working sessions 35
 - standards
 - assessing 128–129
 - with guidance and enablement 279
 - storytelling capability 121
 - strategic alignment summary
 - analyze and synthesize 149–151
 - clarity and action 145–149
 - Is My Organization Ready? 144
 - preparing 143–144
 - starter document 300
 - strategic alignment workshop
 - Audience Characteristics 140–141
 - guide 300
 - Levels of Why 136–139
 - Look of Success 140
 - The MadLib 142–143
 - strategic authority 126
 - strategic content planning 266–268
 - strategic decision-makers 259–262
 - strategic stakeholders 31–32, 34
 - strategize, content life cycle 257, 278
 - strategy
 - capability 121
 - getting to 151–152
 - Strategyzer, The Business Model Canvas 75
 - Structure Level of Why 137
 - structured content
 - author experience 237, 240–242
 - content experience 237–240
 - content modeling 242–246
 - primer 236–237
 - specifying 236
 - style guide
 - accessibility 291
 - acronyms 289
 - and best practices training
 - program 292–294
 - editorial essentials 286
 - grammar and style 288
 - inclusive language 291
 - key messages 290
 - tone of voice 287
 - success, measuring 165–170
 - A Super Simple User Test 9
 - systems thinking 64, 137
- ## T
- taxonomy
 - documentation template 302
 - iterating 205–206
 - overview 203–205
 - team
 - determining expertise 40–43
 - disciplines 40–43
 - matching expertise 44–45
 - norms 53–55
 - picking 40–45
 - roster and responsibilities 45
 - Team Roster Example 45
 - templates
 - Audit Planning Tips and Templates 8
 - Competitive Content Analysis
 - Guidance 79
 - Content Experience
 - Documentation 229
 - Content Measurement Framework and Scorecard 173
 - Content Prioritization 187
 - Messaging Framework 162
 - Roster and Responsibilities 45
 - sitemap iterations 200
 - Stakeholder Communications Plan and Templates 37
 - Taxonomy Documentation 205

- terminology
 - alignment 50–51
 - style guide 290
 - The Toulmin Model of Argumentation 22
 - Thomas, David Dylan 212
 - tone and voice
 - audit criteria 11
 - style guide 287
 - Top Tasks analysis 179–182
 - topic sorting 186
 - Treejack test 201
 - Trends category, business 80
- U**
- UCare example 209–213
 - Urbina, Noz 214, 244
 - “useful” heuristic 168
 - user experience discipline 42
 - user feedback 169
 - user interface design discipline 42, 44
 - user journeys and pathways 213–214
 - user proxy stakeholders 31–32, 34
 - user research
 - assessing appetite 93–94
 - discipline 41, 44
 - documentation and analytics review 96
 - messaging framework 164
 - overview 89
 - performing 95–100
 - proposing approaches 94–95
 - stakeholder workshop 97–98
 - User Scenarios and Topics 189
 - user stories 97
 - user survey 178
 - user testing
 - content audits 116
 - discipline 41
 - experiments 12–13
 - method 8–9
 - sitemap iteration 201
 - tool 117, 296, 299
 - User Understanding Matrix 90–92, 299
 - User Understanding Workshop
 - Activities 99, 299
 - “UX Writing Checklist: Content Heuristics for Designers” 167
- V**
- “valuable” heuristic 168
 - Vilhauer, Corey 236
 - visual design discipline 42
 - visual/audio production 41, 44, 122
 - vocabulary, style guide 290
 - voice and tone
 - audit criteria 11
 - style guide 287
 - Voices for Racial Justice xvi, 192, 216
- W**
- warrant, including in argument 22, 24
 - The Web Project Guide: From Spark to Launch and Beyond* 236
 - Webb, Eileen 236
 - websites
 - inventories 110–112
 - traffic 114
 - Welfle, Andy 54
 - Wenger-Trayner, Etienne 263
 - Why. *See* Levels of Why
 - “Why we need aligned autonomy in marketing” 120
 - working sessions, messaging
 - framework 164
 - workshops/working sessions 35
 - writing capability 122
 - Writing Is Designing: Words and the User Experience* 54
- Y**
- Y (Yield) in DAISY Framework 66