CONTENT STRATEGY

FOR THE WEB

SECOND EDITION

KRISTINA HALVORSON
MELISSA RACH

Foreword by Sarah Cancilla, Facebook

ADVANCE PRAISE FOR *CONTENT STRATEGY FOR THE WEB, SECOND EDITION*:

"The first edition of Kristina Halvorson's little book was like a rip in the Matrix through which light poured. In the space of a few chapters, she had changed our field forever, for the better. This second edition retains all that was wonderful in the first book, while yielding dazzling new insights into the hows and whys of content strategy."

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"When I wanted to introduce content strategy as a 'must' for eBay Europe, I bought a copy of *Content Strategy for the Web* for everyone I needed to influence. Two years and a content strategy team later, it clearly worked! By far the most comprehensive and accessible book on content strategy available. Required reading for our entire team."

—Lucie Hyde, Head of Content, eBay Europe

"*Content Strategy for the Web* is the most important thing to happen to user experience design in years."

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"Kristina Halvorson and her company, Brain Traffic, are central to the emerging discipline of content strategy."

—James Mathewson, Search Strategy and Expertise Lead, IBM

"*Content Strategy for the Web* touched off the explosive growth of content strategy and its recognition as a critical field of practice. Amazingly, this second edition doesn't just keep up: it pushes content strategy in a more mature—and valuable—direction."

—Louis Rosenfeld, author, *Information Architecture for the World Wide Web* and *Search Analytics for Your Site*

"Kristina Halvorson is a force to be reckoned with. In three short years, she has single-handedly brought content strategy to the forefront of the UX community's attention. I'm in awe of how quickly she's mobilized a small army of content strategists, and can't wait to see where she goes next."

—Jared Spool, CEO and Founding Principal, User Interface Engineering

"This little red book is responsible for changing the way I think about designing for the Web, and I don't think I'm alone. After a decade of treating content like an afterthought, *Content Strategy for the Web* helped us fix our priorities, and gave us a better way forward."

—Ethan Marcotte, author, *Responsive Web Design*

"The web isn't about only your website anymore. What does that mean for your content strategy? Kristina and Melissa answer with sassy and sound advice."

—Colleen Jones, author, *Clout: The Art and Science of Influential Web Content*

"If the loss of potential customers and brand degradation keep you up at night, good. There may not be monsters under your bed, but they're in your web presence—and they're coming to get you. *Content Strategy for the Web* offers practical, effective techniques to keep the monsters at bay, whether you're waging war in a small business or on behalf of a corporate behemoth. Scared? Not anymore."

—Margot Bloomstein, Principal, Appropriate, Inc. and author, *Content Strategy at Work*

"If you want your organization or your clients to be successful online, you need to help them think—and act—strategically about all their content. You need this book."

—Janice (Ginny) Redish, author, *Letting Go of the Words: Writing Web Content that Works*

For the staff at Brain Traffic, whose hard work, brave insights,
and shared sense of humor inspired every page that follows … again.

And for our families, whose loving patience and
support made this book possible.

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Content Strategy for the Web, Second Edition

Kristina Halvorson and Melissa Rach

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*“The best people are the ones that understand content.
They’re a pain in the butt to manage, but you put up with
it because they are so good.”*

— Steve Jobs

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FOREWORD

THE RAPID RISE OF CONTENT STRATEGY AT FACEBOOK AND BEYOND

At Facebook, employees are empowered to be bold in the name of innovation. “Move Fast and Break Things,” “What Would You Do If You Weren’t Afraid?” and “Done Is Better Than Perfect” are a few of the mottos pasted on the walls at Facebook headquarters.

Back in 2009, Facebook content was getting “done,” but it was far from perfect. Engineers, designers and product managers were writing most of the copy. If you had a keyboard, you were a copywriter. If you could commit code, you were a publisher. And there was a lot of content: menus, navigation text, product tours, multi-step forms, nomenclature, in-product education, help pages, blog posts, and much more. Less-than-perfect content meant confused and frustrated users, and it was taking its toll on the brand.

The Facebook Design and User Experience team decided it was time to create a new role within the department. They called it “content strategist.”

Just a few weeks before the job posting went up, the first edition of *Content Strategy for the Web* was published. Soon after, the Facebook team contacted author Kristina Halvorson for advice about the position, and she graciously offered suggestions about what to say in the posting and where to look for candidates. She also helped get the word out.

I'd been working as a content strategist at eBay for several years when I spotted Kristina's reference to the job posting. I tucked my already well-worn copy of Kristina's book under my arm and headed off to interview at Facebook. They hired me.

***

Soon after I started at Facebook, I discovered that most of my new coworkers thought "content strategist" was a highfalutin term for "copy editor." They filled my inbox with questions like, "Is there a better word for this?" and "Should the period go inside or outside the quotation mark?" I even had an engineer free-type my rough copy ideas directly into the code for the live site. Thrilling, yes, but not exactly the methodical, holistic process I was hoping for.

I needed to find a way to introduce real content strategy into a system that was hardwired to reject anything that might gunk up the works. In the past, I might have organized a meet-n-greet/dog-and-pony/brown-bag extravaganza to educate to my colleagues about the benefits of content strategy. But my usual approach wasn't going to fly at a company that valued action far above talk. Instead, I heeded the "move fast" writing on the walls and focused on gaining quick wins.

I first set my sights on a group of links in the lower corner of the Facebook homepage. These links offered people the chance to invite friends to Facebook, connect with friends already there, and try Facebook Mobile. The links didn't drive a lot of traffic and weren't an important piece of the team's strategy, so they didn't want to dedicate resources to improving them. But I was welcome to change the copy. So I did, relying completely on my content strategy intuition to guide my decisions (there was no time for testing, after all). At the very least, I knew I could make the calls to action clearer and more compelling.

Mere hours after I made my quick-and-dirty changes, we rolled out the new version of the content module. The result? Net traffic to this area of the page rose 56%. Which is to say, *six million more people* found friends, invited friends, and tried Facebook Mobile every week, purely as a result of those tiny improvements.

Over the next few months, I gained a few more quick wins for content. And each time I tackled a project or fulfilled a request, I carefully framed my proposals in the context of the larger Facebook content strategy that was beginning to evolve. I also tailored my recommendations to the audience at hand: When working with engineers, I tried to make things simple and empirical, often relying on spreadsheets and "if-then" statements. With designers, I went visual. And with executive stakeholders, I always made an effort to reference bigger-picture goals.

When someone championed the cause of content strategy, that person became a "FOCS" (friend of content strategy), and was awarded a coveted FOCS tee. As in, "You know that guy Matt? He's a total FOCS."

Soon, people started to solicit my help on more complex problems. Questions about tone, structure and site-wide consistency began to outnumber those about grammar and syntax. The company began giving enthusiastic support (and budget) for longer-term, content-driven initiatives.

Today, a mere two years later, there are nine content strategists on the Facebook team, and we hope to welcome several more by the end of 2012. We work alongside product managers, designers, engineers, and user researchers on every major product launch. We've developed a comprehensive set of content standards for the company. And we serve as a hub for the teams throughout Facebook that touch user-facing content, including product marketing, user operations, and the lawyers.

***

In the two years since I started at Facebook and *Content Strategy for the Web* first came out, the discipline has come into its own. Meetup groups have formed all over the world. People are gathering at conferences dedicated exclusively to content. Not unlike Facebook itself, content strategy has spun into a spirited community of people who are excited to share new ideas and perspectives—allowing the discipline to advance at an amazing clip.

Content Strategy for the Web has played a huge role in educating web practitioners and business leaders about why good content matters. Not only does the book champion a strategic approach to content, it also demystifies how to do it. Whether you're a seasoned content strategist or it's your first time at the rodeo, you've got everything you need to create, deliver, and govern useful, usable content right here.

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Facebook's culture is unique, but what moved the cause of content strategy forward here could happen anywhere—including where you work.

- **Demonstrate value on your own terms.** Be proactive, and identify tiny projects that will showcase the benefits of content strategy. Then get them done, with or without resources.
- **Apply content strategy to your content strategy.** Frame each recommendation and each success within the context of the larger content strategy, even if the request was tactical in nature. And do it in a way that will appeal to your audience.
- **Friend everyone.** Cultivate allies, find your FOCSes, and make them T-shirts.

In 2009, the content strategy community was small. Now it's vast, and eager to support you in your efforts to make a better web through better content. Today, when you tell people you're a content strategist, the question is no longer, "What's content strategy?" Now it's, "When can you start?"

Join us as we move toward a web where content strategy is not simply nice to have, but an essential part of what we make and imagine.

Sarah Cancilla
Content Strategist, Facebook

BEFORE WE BEGIN...

If you're reading this book for the first time, then hello! It's lovely to meet you. And if you're familiar with the first edition, then hey, welcome back. Glad to see you again. Give us a hug.

So. Things out there in the world of content strategy have changed pretty significantly since the first edition of *Content Strategy for the Web* was published. What used to be a niche topic discussed by only a few hardcore content nerds has become a worldwide movement in organizations of all shapes and sizes. Hooray! More hugs all around.

As the conversation continues to gain momentum, the field of content strategy is evolving at lightning speed. And so, by necessity, this second edition of *Content Strategy for the Web* is a much different book from the first. But don't worry. All new material has evolved directly from the methodology described in the first edition; all revisions are based on the shared knowledge of the wider content strategy community, and our own experiences at Brain Traffic, our Minneapolis-based content strategy firm.

And now, a few things to note:

WHAT THIS BOOK IS

This book is an introduction to the practice of content strategy. It describes some of the key benefits, roles, activities, and deliverables associated with content strategy.

We wrote this book for people who want to understand what content strategy is, why it's important, and how to go about getting it done.

This book also makes the case for content strategy as a legitimate, necessary practice in any and all organizations that create and publish content online.

Throughout the book, we describe processes and methodologies that may be applied to all kinds of content (not only text). And as you read, remember that just about everything we write about can be scaled and tailored to fit your needs.

WHAT THIS BOOK IS NOT

This book is not The Complete Guide to Everything You Ever Need to Know About Content Strategy, Ever.

We hope you find this book a valuable reference tool for a long time to come, but don't mistake it as the only book you'll ever need. In fact, here are a few specific topics this book intentionally does not cover (at all, or in detail):

- Content management systems (CMS) strategy (software selection, design, and implementation)
- Translation and localization
- Personalization and behavioral targeting
- Content marketing
- Social media planning
- Metadata strategy
- SEO
- Reuse and structured content (or "intelligent content")
- Single-channel strategy (e.g., mobile)

Yes, a content strategist will often assume responsibility for the activities and deliverables associated with each of these. In many cases, there are already several solid resources available about these practices, both online and offline. We're keeping our focus on an introduction to content strategy, so we've made it our job to synthesize this information and frame it up in ways that allow teams to tackle content challenges holistically.

WHAT'S NEW IN THIS EDITION

When you set out to write a second edition, it's awfully tempting to scrap everything and write an entirely different book. Instead, we've tried to strike a balance: plenty of new information for readers of the first edition, but a similar introductory flavor for our first-time readers.

As the proud owner of this shiny new edition, here's what you'll get:

- Expanded and restructured processes and tools for the research, development, and implementation phases of content strategy
- Recent case studies examining the impact content strategy has had on a variety of small and large organizations
- An examination of the ways content-focused disciplines and job roles work together
- Discussion of the roadblocks you may encounter and ways the field of content strategy continues to evolve

A NOTE ABOUT CONTENT STRATEGY FOR THE "WEB"

Content strategy. It's not just for websites anymore.

Actually, content strategy was *never* just for websites. In fact, it's been around a lot longer than the web. So why all the recent attention?

While organizations have struggled for decades—centuries, even—to make sense of their content, they were always able to keep the chaos (and the consequences) to themselves. Then came websites, which created the perfect content strategy storm. Suddenly, organizations had to put all of their content (product info, investor reports, press releases, etc., etc.) in one place. For the first time. For all the world to see. And, it hurt.

You can redesign a home page. You can buy a new CMS. But unless you treat your content with strategic consideration, you can't fix your website. Once people started to accept this fact, the conversation took off. It's a pain point everyone shares, and content strategy offers relief.

Here's the other thing: In our opinion, focusing on the web is still the easiest way to learn about content strategy. **Once you "get" content strategy for the web, you can easily see its applications across platforms and throughout the enterprise.**

All that said: Throughout the book, when we use the phrases "web," "online," or "interactive" content, we're often not just talking about websites. The overarching goals and approaches of content strategy are relevant across every medium, platform, and device. As evolving technology continues to throw us one curve ball after the next, keeping a handle on our content—no matter where it is and who it's for—has become more critical than ever.

AND NOW, THE BOOK

Okay, that should be everything. Thanks for your patience with all of this preamble stuff.

You can go ahead and read the book now.

Enjoy.

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4 ALIGNMENT

BECAUSE CONTENT TOUCHES just about every area of an organization, strategies only work when everyone is aligned and on the same page.

Alignment starts in the discovery process and continues, well, forever. At the beginning of the content strategy process, alignment is about providing your stakeholders with baseline information about the content, each other, and the strategy process. Then, for the rest of time, it means keeping people up to date, asking for input, and responding to questions. (Yes. Seriously. Forever.)

C'MON, PEOPLE NOW

Alignment isn't necessarily about creating consensus. It's about creating a common understanding. But how on earth are you supposed to accomplish that? In this chapter, you'll learn how to:

- Identify your stakeholders.
- Convince them to participate.
- Set the stage for alignment with a kickoff.
- Get them engaged.
- Keep them motivated throughout the project.

WHY IS ALIGNMENT SO IMPORTANT?

We've found that we can often predict how successful a content strategy will be within the first few weeks. How? We look at how receptive the project sponsors are to collaborating with others. It's our experience that people who are open to input and opinions succeed far more often than those who try to keep their projects under wraps.

Content strategy requires outreach and alignment. Why? Two reasons.

Lots of people affect your content

People throughout your organization are involved in content processes. The marketing and branding teams might be obvious players, but legal reviewers, subject matter experts, technologists, and many others have roles to play. Acknowledging and understanding their ideas, issues, and opinions will help you create a more informed, effective strategy.

Your content strategy affects lots of people

When you introduce a new content strategy, you're asking all of those people to change their habits, opinions, and accountabilities. That's a tall order. You'll need more than a fancy PowerPoint™ presentation to change people's behavior—you'll need their trust.

You'll need to help them understand the big picture. Ask for input and respond to questions. Show them where they can contribute and how they will benefit. The earlier you start, the better. So, hey, let's get started!

FIRST, IDENTIFY YOUR STAKEHOLDERS

When we talk about "stakeholders," we simply mean "people who matter to your project." Stakeholders can make or break your strategy project—so it's important to think carefully about who is necessary to the health of your content.

TYPES OF STAKEHOLDERS

When people think about picking stakeholders, they often try to get representatives from each of the departments in the organization. That's a good way to start. Having the right departmental representation is important.

However, as you create your list, you may want to think about functional categories, as well:

- **Strategic decision makers** are people who will be most impacted by your strategy and, therefore, deserve to have a significant amount of impact and input during the process.
- **Money people** are the folks that are funding your project. Maybe it's your boss, and your boss's boss. They are likely the ultimate decision makers on everything you do.
- **Champions** are people who will advocate for your project regardless of their relationship to the content. They see the value of content strategy and go out of their way to get others interested and invested.
- **Showstoppers** are individuals who have no "official" power, but could stop the project in its tracks (the CEO's henchman, for example). This category includes people who are politically necessary. You have to invite them, because they'll turn into showstoppers if they're not involved.
- **Interested others** are people who have tangential interests in your project. Maybe they have a very limited or indirect relationship to the content. Or, maybe they're considering a similar project of their own.

Considering these categories will make it easier for you to decide who needs to be involved, when, and in what capacity. Do they need to come to every meeting or just the big ones? Do you need to interview someone personally, or can you just send him a questionnaire?

Categories like this are certainly not a caste system. People can move from one to another, and sometimes be in two categories at once. **But, identifying your stakeholders by how they impact the project and not by their areas of expertise will help you understand how to involve them going forward.**

YOUR DAY-TO-DAY PLAYERS

The people in the "strategic decision maker" category often make up your core team. They come to all the meetings. They come up with the lion's share of ideas. And, they are the most important people to keep aligned. (The money people can be part of the core team, too, depending on their accessibility and interest.)

Of course, it's important to limit the core team to a reasonable size. What that size is depends on your situation. But, if you have a "core team" of 25 people, it'll be hard to get anything done. If you've got a big number of strategic decision makers, you'll have to decide who is most critical to have on the core team and who has the time to participate. Or, you can create several task forces that can work on different aspects of the project simultaneously.

Just be sure no one is excluded from the process altogether. Even the "interested others" should still be respectfully involved—whether you invite them to the biggest meetings or simply send them a quarterly email update.

NO ELITISM, PLEASE

It's tempting to just invite managers to represent their teams. But, in reality, the managers don't always know how things work in the content trenches. Be sure to include people who really know what's up, even if they're interns. A combination of people from all levels of the organizational hierarchy works best.

THEN, GET THEM INTERESTED

People are busy. They might not want to add anything else to their already triple-booked schedule. If you have key stakeholders you want to support or participate in your content initiatives, you may have to work at it.

You need to tell a compelling story (you're a content-savvy person, after all). Create a nice story arc, and present your case with the following elements:

- **The problem or opportunity:** What's going on with content—complete with some persuasive facts from the research or some particularly convincing examples on how content affects the stakeholder's bottom line or area of responsibility.
- **The urgency:** Why it's urgent to work on the content problem *right now*. (Competitive advantage? User needs? Business opportunity?)
- **The request for help:** Why you think they would be an asset to the team; what unique views they can provide. Make sure you tell them how much you respect their time, and outline your expectations for participation.
- **The players:** A description of who is participating (direct them to some of your project champions, if you've identified them already).
- **The payoff:** The benefits to them and the organization as a whole.

Most people like to be helpful and will agree to participate at some level. If someone important turns you down, respectfully ask them why. Resistance is often about lack of clarity, so you may be able to change their minds if you clear things up. If they still say "no," ask if they'd like occasional updates about content projects. Keeping them involved at any level is a win for you, if only a small one.

KICK OFF ON THE RIGHT FOOT

Usually, there is a formal kickoff meeting at the beginning of any content strategy project. This is where all the agreed-upon stakeholders come together for the first time. We often wait to host that bonanza until we have some research and analysis (see *Chapter 5, Audit*, and *Chapter 6, Analysis*) under our belts. That way, we can use early findings to put the project in context *and* ask the stakeholder group to fill in any analysis gaps. So, from the beginning, people are learning and contributing—getting the information exchange off to a good start.

As you're working toward early alignment, here's what should happen in the kickoff meeting.

EXPLAIN WHY YOU'RE THERE AND WHAT YOU'VE DONE SO FAR

If you want to get people on board, you need to be sure they feel included in the conversation. Using lots of industry lingo and failing to tell them what to expect will burn you every time. You'll need to:

- Explain what content strategy is
- Reiterate how content strategy will benefit the organization and the stakeholders

And, if you've already completed any audit or analysis work, you can discuss:

- What content exists today and what shape it's in (your audit findings)
- What the internal and external factors are that impact your content—highlighting user research, competitive research, and the content workflow process

HELP EVERYONE GET TO KNOW EACH OTHER AND THEIR ROLES

Probably the most important part of alignment in the discovery phase is to help stakeholders learn about each other. In large organizations, it's not uncommon for people to meet each other for the first time on a content project. Even in small companies, people may see each other in a new light. Helping people understand and engage with one another is a huge part of the job.

SET CLEAR EXPECTATIONS FOR WHAT COMES NEXT (AND FOR WHOM)

Lastly, you need to set the stage for the rest of the work. People will want to know:

- What is their role in the process?
- How much and how often will you need them to participate?
- What kinds of things will they be doing?
- Who are the decision makers and what is the decision making process?
- What are the immediate next steps?

The more they know, the more they'll feel some ownership in your content projects from day one. Remember, your stakeholders are your allies—or, if they're not initially, it's your job to find that common ground. You want them to trust you so they'll share the stuff that matters.

ENGAGEMENT DOESN'T STOP AFTER THE KICKOFF

At the beginning of a project, alignment is a major focus. But, it's important to make sure you keep the momentum going. How and when you solicit stakeholder input during the remainder of the project is unique to your situation. But no matter what happens:

- **Communicate and encourage participation:** Schedule regular meetings, host workshops, send regular updates, have Q&A sessions, etc. Be consistent as clockwork—it's another way to inspire trust.
- **Listen and respond:** Always take the stakeholders seriously. Respond to their ideas and insights in a respectful, timely way.
- **Distribute documentation:** Make sure people always have documentation in hand—so they can follow along in meetings and have reference materials whenever they want to refresh their memories.
- **Celebrate milestones:** Highlight milestones and other progress. Be sure everyone knows how he or she contributed in positive ways.
- **Set expectations:** Make sure people always know where they stand. What is their role in the project? What do they have to do next?

Alignment is a never-ending, but highly rewarding, process. Just think of the smart people in your stakeholder group. When you harness all that brainpower, you're bound to meet—and exceed—your business and user goals.

GO, TEAM, GO

Alignment is a huge first step as you head into your discovery phase. Once you've rallied the players, you're ready to tackle your content together.

In the next two chapters, we'll dig deep into your content (audits) and examine the world in which it lives (analysis).

Are we aligned on this plan? Terrific. Onward.

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