



## Content Strategy Roadmap

This is the process for a complete content strategy effort. The end result of this process is that all of an organization's content is created, managed, and governed in holistic, effective manner.

### 1. Understand the organization and project business goals

The goals of this phase are to validate the project's scope and goals, identify key target audiences, and develop a solid foundation and context for the project's work.

#### Tasks:

- Hold a kickoff meeting with key staff members. The first segment of the meeting will be a high-level overview that executives should attend; the rest will be for explanation and discussion for SMEs and the digital team.
- Review existing reports, surveys, and other documentation about the organization's strategic goals, digital goals, website and social media analytics, search logs, member satisfaction, needs assessments, exit surveys, etc. in order to "know what we know" and determine whether there are gaps.
- Conduct up to 5 stakeholder interview sessions with project executives and groups of staff members, in person or by phone. Stakeholder interview sessions will cover project goals and business objectives for the website, as well as challenges. [Here is a link to our stakeholder interview template.](#) (Word)
- Prepare and analyze brief questionnaire to collect information from other stakeholders about their goals and challenges.

#### Your participation needed:

- Feedback on kickoff meeting agenda
- Provide existing documentation, if any is available
- Identify stakeholder groupings
- Schedule stakeholder interviews
- Feedback on stakeholder questionnaire

#### Deliverables:

- Kickoff meeting presentation
- Document review capturing the observations and opportunities for content revealed in the documents
- Stakeholder interview report documenting key opportunities, challenges, and themes.

**Typical timeline:** 3 to 6 weeks

### 2. Understand the dynamics and goals of top-priority audiences

While stakeholders can identify the audience segments that are most important to them, we need to uncover details about those audiences and articulate what they want most from the organization.



There are several ways to get this information. An online audience survey is efficient and broad, but the results depend on which audience members participate. Empathy-based personas and audience journeys based on facts uncovered in the the document review and stakeholder interviews help the organization's staff tap into their experience with the audience and their knowledge of human nature to develop a deeper sense of who they create programming for and who's reading and using the content they produce.

Clients are sometimes skeptical that staff-created personas will hold true, but focus groups have always validated the personas and journeys.

### **Good: Online audience survey**

#### **Tasks:**

- Create the survey
- Launch and manage survey communications
- Analyze survey results

#### **Your participation needed:**

- Feedback on online survey content
- Identification of audience segments to survey
- Send out survey (we can also do this, depending on your preference)
- Send out survey reminders

#### **Deliverables:**

- Audience survey report highlighting needs and opportunities

#### **Typical timeline:**

- 1 week to develop the survey, 2 weeks for the survey to stay live, 2 weeks to analyze survey results

### **Better: Empathy-based audience personas and engagement journey framework**

#### **Tasks:**

Conduct two brainstorming workshops with staff to

- identify the highest-priority audience segments to serve online
- flesh out their personas with key contextual information about their challenges, fears, and hopes
- articulate the strategic opportunities for the organization to serve them

Validate personas and engagement journeys through focus groups

- Recruit people to match the personas demographically
- Confirm whether the strategic opportunities identified in the journey workshop are consistent with participant behaviors, opinions, and drivers

#### **Your participation needed:**

- Determine which staff members to include in brainstorm sessions
- Schedule brainstorm session and provide space
- Attend brainstorm sessions



- Determine whether focus groups are needed, help identify location, provide potential participants, provide small honorarium for participants

**Deliverables:** Detailed, validated descriptions of up to four personas and customer journeys

**Typical timeline:**

- Personas: 1 week to develop the persona skeletons, 1 day to conduct the first brainstorm, 2 weeks to extract insights and create customer journey outlines
- Customer journeys: 1 day to conduct the second brainstorm, 2 weeks to extract insights
- Focus groups: 1 week to develop and vet scripts, 4 weeks to recruit participants, 1 week to conduct sessions, 2 weeks to write up report

### 3. Audit and assess existing website content

The content audits Content Company conducts are more extensive, and more actionable, than any out there. The goal of a content audit is to understand the content that exists, learn about its patterns, identify opportunities for improvement, and develop practices that will set the organization on a path to sustainable, effective content.

Before conducting an audit, we work with the client to develop criteria to use in evaluating content: What kinds of content are important to keep for a long time? Which should be deleted quickly? What criteria constitute content “ROT” (redundant, outdated, or trivial)? What kinds of content are most successful today? What goal would a user have for reading particular pieces of content?

[Here is a link to our content audit planning worksheet.](#) (Word)

What makes our audits most useful are the notes, observations, and recommendations. Since we have examined numerous organizations’ content at a granular level, we can offer educated recommendations about what content to keep, what to revise, what to remove, and what to archive. In previous projects, we have found that up to two-thirds of an organization’s content needs to be revised.

[Here is a link to our content audit template.](#) (Excel)

As we audit content we also begin to document topics, page types, and content types, to inform the taxonomy, site map, wireframe, and content management system requirements. (The detailed work on this element happens post-audit in Part 8.)

**Tasks:**

- Flesh out website content inventory as necessary, incorporating as much information as possible about content type, topic, ownership, age, and usage
- Collaborate with organization to create content criteria: what to keep as-is, what to revise, what to archive, and what to delete
- Analyze frequently used on-site search terms and phrases



- Identify patterns and opportunities
- Articulate content gaps

**Your participation needed:**

- Provide access to website metrics, as available
- Provide passwords for secured content areas
- Collaborate on content criteria
- Feedback on content audit findings, facilitating discussion with content creators/owners

**Deliverables:**

- Content matrix
- Content gap analysis
- Content findings and recommendations report
- Content owner presentations and discussions

**Typical timeline:** 6 to 12 weeks

#### 4. Analyze content from comparative/competitive organizations

In order to get a sense of what's most important to focus on first, it's often wise to compare what the organization is producing against other sites – whether for-profit or not – that are providing content on the same topics for the same audiences.

**Tasks:**

- Identify appropriate comparison and competitive sites and organizations to audit
- Develop appropriate metrics to use
- Conduct the analysis

**Your participation needed:**

- Identify up to 5 comparable/competitive sites
- Validate comparison metrics

**Deliverable:** Comparative audit findings report

**Typical timeline:** 3 to 4 weeks

#### 5. Develop guidelines for content creation and publishing

The content guidelines we develop for clients includes guidelines for voice and tone, editorial style, and publishing best practices. We create the foundation for the voice and tone guidelines from a message architecture workshop.

**Tasks:**

- Identify appropriate editorial style guidelines
- Facilitate a message architecture workshop
- Identify the voice and tone that is appropriate for the brand and adapted effectively for each content source and channel



- Adapt publishing best practices to client's content and channels

**Deliverable:** Content guidelines

**Your participation needed:**

- Identify participants for message architecture workshop
- Feedback on message architecture
- Input about what guidelines the organization needs

**Typical timeline:** 2 to 4 weeks

## 6. Identify roles, lifecycles, workflow, and governance models

Content governance determines how content gets created, approved, published, and managed. It includes:

- Content governance model
- Content roles and responsibilities
- Content workflow and lifecycles
- Content success metrics

The people and process aspects of content strategy are a core strength and interest area for us. Without a solid plan for these, a content strategy effort cannot succeed. In fact, governance is often the most challenging part of creating a sustainable content strategy. Content Company's role in this phase of a project is to facilitate information, with the client having a key role, so that the ultimate governance structure is one that is consistent with the organization's other structures and can succeed over time in the organization's culture.

We evaluate the impact of content strategy by measuring and evaluating content-specific elements: greater member satisfaction in being able to find information, higher awareness of programs, products, services, events, etc. by current and prospective members and other target audiences, and higher revenue opportunities for publishing properties, including the website and publications. The details for each of these are determined by your specific goals. We develop measurement rubrics based on conversations about the goals and the success metrics.

**Tasks:**

- Define roles and governance structure
- Define content access-level strategy
- Define content success metrics and ongoing decision process

**Your participation needed:**

- This is the most time-intensive phase in terms of your involvement. Because this work determines how your content will work going forward, every aspect of this phase will involve you. Our role in this phase is to share best practices and ask questions, but this is ultimately your output. Sometimes orgs involve IT or a cross-functional team.

**Typical timeline:** 4 to 6 weeks



**Deliverables:** Document outlining all of the above

## 7. Facilitate the creation of an organization-wide taxonomy

Creating a unified set of names for topics and other types of metadata enables content to be found and cross-promoted, regardless of which department creates it. Some organizations don't have any taxonomy defined, while others have multiple taxonomies.

Since taxonomies are topic-specific, Content Company sometimes serves primarily as a facilitator to determine the optimal framework and then fill it in.

### Tasks:

- Identify a prioritized set of metadata controlled vocabularies
- Develop and validate a content taxonomy as warranted by the assessment
- Identify tools to use for tagging content
- Identify roles for tagging content for migration and on an ongoing basis

### Your participation needed:

- Identify the taxonomies the organization already has
- Validate a taxonomy framework
- Work with staff or members to fill in controlled vocabulary values

**Typical timeline:** 4 to 8 weeks

**Deliverables:** Content taxonomy, tagging plan, taxonomy governance plan

## 8. Plan for content transformation and migration

As part of the content audit, we will identify the condition of each piece of content (good as is, needs revision, to be archived, to be deleted). The content matrix we deliver contains a rich set of information about the content. In previous projects, we have found that up to two-thirds of an organization's content needs to be revised or transformed in some way. Further, depending on how the site's content is currently structured, it all may need to be touched in some way before it can be used more effectively.

We develop a set of content models that can be used to create and store content, as well as to promote it efficiently and effectively.

### Tasks:

- Assess content for quality, usability, and task focus
- Assess content for migration
- Create content models/types, vet with IT and UX designer
- Determine the resource needs (in-house/freelance, manual/automated), level of effort, and timeline for transforming and migrating content

### Your participation needed:



- Input on scope for content transformation, given user experience and technology considerations
- Feedback on content models

**Deliverables:**

- Content models
- Content transformation and migration schedule

**Typical timeline:** 4 to 8 weeks

## 9. Create a framework for content planning/promotions

When an organization plans content in a holistic, transparent way, there is a much greater chance of it succeeding. Further, content with a clear audience and an explicit goal is easier to promote. With an understanding of which audiences use which channels for what goals, it's possible to create a content calendar that will increase the content's chances of being found and used by the target audience at the right time.

**Your participation needed:**

- Input on content calendar framework

**Tasks:**

- Create a content calendar based on topics, content volume, and promotion channels
- Create a communication plan for metrics

**Deliverables:** Content calendar, metrics communication plan

**Typical timeline:** 2 weeks

## 10. Determine staffing needs

Content takes time and people — and most governance models call for a partnership between people with subject-matter expertise and those with expertise in publishing content. This partnership ensures that content is most effective for the medium (web pages, e-newsletters, blog posts, social media, print materials, video, audio, etc.). Effective content is an investment, and the organization needs to examine how to make the wisest investment in the people aspects of it.

**Your participation needed:**

- Input on content staffing calculator: volume, tasks, time, and work division
- Validation, as needed, from the departments that generate the organization's programs, products, services, resources, tools, and information

**Deliverable:**

- Content staffing requirements

**Typical timeline:** 2 to 4 weeks



## 11. Plan for sustainability

When all the content strategy tasks are “done,” the real work is just beginning. The key to long-term content strategy success is to keep the principles top of mind with all relevant parties, from content creators to senior management. The result is making the content strategy principles part of the way things work at the organization. We call this “operationalizing and socializing content strategy.”

This typically entails a communication plan to educate and reinforce content principles.

### Tasks:

- Create a plan to train new staff and volunteers about content best practices and the organization’s content governance
- Create a plan to remind existing staff on an ongoing basis about content practices, as well as share success stories and lessons learned
- Ensuring that content governance guidelines are built into HR and IT systems, among other things.

### Your participation needed:

- Input on education and training needs, given the organization’s overall culture and existing education and training practices

**Deliverable:** Communication plan for ongoing content strategy education and training

**Typical timeline:** 3 weeks

## Potential add-ons

### Web writing workshop

#### Tasks:

- Half-day workshop for up to 15 participants who create content. Goal is to teach them about how to create user-focused, goal-oriented content

### Regular content review

#### Tasks:

- Quarterly, bi-annual, or annual review of content to ensure that it continues to follow the organization’s style and best practices and meets goals

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