UX Foundations: Content Strategy

- **Content Strategy: an introduction**
- Content strategy is the art of bringing the right content to the right person and the right place at the right time and in the right context. It's an umbrella term that covers the planning for, development of, and management of content. The discipline of content strategy grew from a need for more concrete plans, structures, and organization of content published digitally. It was a response to how content publication has evolved. In traditional print environments, everything from page size to press pressure and distribution numbers could be tightly controlled.
- Content strategy is about bringing the right content to the right person at the right time, in the right context, and making sure it's accurate, up-to-date, and appropriate through ongoing engagement. For this to happen, a communication of ideas must take place, requiring an in-depth understanding of an audience, their needs, and their communication style.
- "Content" applies to anything that conveys meaningful information to a person. Content can be presented as text or graphics or images or video or audio.
- The term "content" applies to anything that communicates or transfers meaningful information to a person, emphasis on meaningful information.
- The content strategist enhances the meaningful information of content by understanding the intended message, context it's presented in, and how to transfer it to the right audience.
- Content strategy is not just about creating a message. It's about giving the message the best possible chance of reaching and being understood by its intended audience. And while the final content matters to the content strategist, their true focus is on understanding the content creator and their intentions, the audience and their needs and desires, the nature of the channels and mediums the content will be presented in, the people and processes that produce and maintain the content, and the ongoing planning for and management of the content. Content strategy is the planning for and creation, delivery, and governance of useful, usable content that, in turn, helps you reach business goals. It visualizes the cost and benefit of creating quality content. It provides ways to measure the efficiency of content, and the necessary tools and frameworks to make ongoing adjustments to improve efficiency over time. Content strategy is the foundation on which your investment and content can be safely built and maintained.
- **The content strategy process**
- content strategy is really an infinite number of interconnecting circles, all of which affect all the others. In other words, no matter where you start, you'll have to circle back, because your results will have an impact on all the other work you've done.
- Halvorson's system presents content strategy as a circle split in two main halves, content components on the left, and people components on the right. Each of the

halves are, in turn, split in two. The content components consisting of substance and structure, the people components, workflow and governance. The idea of these separations is to identify the different overall components that must be covered to create a holistic content strategy. Halvorson's system is analytical, and draws clear lines of separation between each component, while at the same time reminding us, they are all interconnected as part of a larger whole. Another system approaches the problem in a more streamlined fashion, organizing the different components of content strategy along a timeline for practical application. In the Elements of Content Strategy, content strategist Erin Kissane outlines this process as three distinct stages, evaluate, design, and execute. In the evaluation stage, research and analysis takes place to establish a solid understanding of the stakeholders, subject matter, and audience. In the design stage, planning and structural decisions are made to ensure the content is organized and presented in an easily accessible and understandable way. In the final execute stage, structures are put in place for the actual creation, publication, and maintenance of the contents, both short-term and long-term.

- Content strategy is a holistic endeavor. Just like a rolling ball, the center, the people, their motivations and goals, always stay in the center, and everything else revolves around them. And just like a rolling ball, the further out from the center you get, the more motion and flux you'll experience. Any time the ball dents or deflects, it has an impact on the whole structure, not just a surface, and if you take any part of the ball out, the whole structure collapses.

- **Users, motivation and goals**

- At the core of content strategy, we find the message created by people and meant to be understood by people. To create a successful content strategy, we first have to understand these people, their motivations and their goals.
- People are unique individuals, infinitely complex and perplexing, infinitely interesting, surprising and ingenuous. Understanding people is important.
- f we start with the origin of the content, we find the project stakeholders. These are all the people who literally have a stake in the project, either as owners, managers, creators, or maintainers. Getting a firm grip on the stakeholders will help ensure a successful project. The goal of talking to stakeholders is to get a clear answer to these three questions. What message are we communicating? What does success mean for this project? And how do we set realistic, measurable goals? The best way to go about this process is through project research and stakeholder interviews.
- . For every project an audience has to be defined. Whether your organization has a clear definition of who their primary audience is or this is an explore territory clearly defining an audience is a vital part of developing a content strategy. To start this process, ask a simple question. Who is the organization aiming to reach?
- their networks look like? In this process it's a good idea to do a competitive analysis. Who is the defined audience of your closest competitors? Who are their influencers?

How are they reached? And how are their goals being met? When defining an audience it's important to look beyond immediate staff influencers and target audiences of the organization. While they provide a good starting point for exploration a much larger audience can likely be found by casting a wider net. One strategy that can be effective in defining an audience is first mapping out your potential audience, primary, secondary, tertiary etcetera and then narrowing down a group within the group as your target audience. This will ensure you've explored your entire potential for reach and made an educated decision on what audience to target. It also provides a wider footprint if the target audience needs to be changed or expanded in the future.

- Context is an incredibly important and interesting concept, especially when it comes to communication. In simplified terms, context is, as it relates to content strategy, is the circumstances that form the setting for an event, statement, or idea from which it can be fully understood and assessed.
- In content strategy, it's important to identify what contexts may impact peoples' perception and understanding of what they are presented with and account for it as much as possible. The most obvious example here is accessibility issues. While we often think of all users as able-bodied people with endless time and money, the reality is often different. The person accessing your content might be in a rush to get somewhere, have the flu, be under stress, have some sort of permanent or temporary disability, and all these contexts may impact them in their interactions with our content. When planning for your content strategy, make sure you identify relative contexts, like accessibility in this case, and plan and test for them to ensure everyone is able to access your content. Even a person carrying a baby, and juggling a smartphone and a cup of coffee while trying to open a cab door should be able to access airline departure times for their upcoming flights on their smartphones. Only by accounting for the contexts of mobile internet, limited mobility, one-handed use, distraction, and limited time, can we provide a service that meets the needs of that target audience.
- Although it would be great to have full and constant access to your target audience throughout the project, this is neither practical nor realistic. To provide points of reference for the different types of people in the target audience and keep them front and mind throughout the project, we develop what's known as personas. These are archetypal descriptions of people, complete with names and attributes, that encompass the common attributes and qualities of different groups within the target audience. Traditionally, personas have been developed to represent people in an ideal context and state for accessing the content.
- One way to gather this data and build fact-based personas is through interviews and surveys. Start by mapping out what information about the target audience you believe is relevant to the project. This could be anything from age and gender to what kind of connected device they use, where they live, how often they brush their teeth, or whether they prefer penguins or cats. It all depends on your organization and the

product or service you're offering. Turn these pieces of information into questions that will produce accurate and useful data. To build out your persona spectrums, make sure to include questions that relate to different contexts relevant to your subject matter and allow the respondents to provide different answers, depending on these contexts.

- The empathy map is a great tool to deepen your understanding of your personas by placing them in the context of their surroundings. Creating an empathy map is also a great group exercise for the entire content team to get to know the target audience. To create an empathy map, you simply draw out this diagram on a whiteboard or a large sheet of paper and then you map out what the persona thinks and feels, sees, says and does, and hears, as well as their pains and gains. The actual process is pretty much akin to a brainstorming exercise where you simply think of a persona and then the whole team starts throwing out ideas about what the person thinks and feels.

- **Analysis and structure**

- r the substance. And how, where and with what are we publishing it? The structure. In this stage of the process, we're building a new layer on our ball that wraps around the core of people, motivations and goals. This layer has two parts. First, analyze new and existing content to make sure the substance of the project meets the motivations and goals of stakeholders and their audience, and second, create a map of the content that needs to be written and produced, along with the structures to present the content in the easiest, most accessible and most meaningful way. In this process, we'll use the personas and empathy maps as a foundation to map out content, information architecture and activity flows.
- A quantitative content audit is quite literally a tally of every piece of content that exists or will exist in the project. In the content audit each piece of content is listed along with relevant metadata to form a clear picture of what exists, what needs to be created, and who is responsible for each item. This data typically goes into a spreadsheet for easy access and analysis.
- The qualitative content audit is an ongoing process that you'll circle back to throughout the initial content production process and also as the project goes live. Whereas the quantitative content audit was focused on listing out every piece of content in the project, the qualitative content audit dives into each piece to make sure it stands up to scrutiny. For each piece of content, ask these questions: does it meet the project goals? Is it communicating what we intended to communicate? Is it useful? Does it have a purpose and is that purpose meaningful to the audience? Is it audience-centered? Does the content provide the audience with something they need or have use of? Can the audience understand the content and figure out its context and use? Is it clear? Does it speak in a language the audience can understand? Is it consistent? Does it match the overall voice and tone of the project?
- easier to digest. This is also a great time do to both a gap and a competitive analysis. The gap analysis looks at the quantitative and qualitative audits and asks whether all

necessary content is present and all questions are answered sufficiently. The competitive analysis looks at your closest competitors and makes sure you provide better or more communicative content that fills the gaps they have in their content.

- A typical web-based publication has at least three content models, static pages, blog or news posts, and fillable forms. Mapping out these content models is an important part of the content strategy process. This helps identify what content fits in each content model bucket and builds bridges between content creators, designers, and developers as the content moves from early-stage drafts to publication. The content model breaks large views of content down into their individual parts and maps out the types of content collected and displayed for each model.
- Once personas and content audits are established, user scenarios and activity flows can be explored. Their purpose is to establish when the audience access the content, why they are there and what they want to accomplish and how to get them through the experience in the most effective way possible. Both scenarios and activity flows can vary greatly depending on the type of project you're working on. For an eCommerce solution, scenarios may range from casually browsing for a possible future purchase to "Must buy this thing immediately." or "Can I pick this up in a nearby store?" to "Was this the thing my friend said they wanted for their birthday?" For a site containing mostly information, scenarios could be anything from, "I followed this link from social media and want to read the article," to, "I saw this URL on the back of a bus and wonder what services you provide," or "I did a Google search and ended up here. Now what?" Each of these scenarios can describe the same user with different motivations and expectations or different users with the same goals, but different entry points. Figuring out which scenarios are common and which are most relevant, you can use them as a starting point for crafting activity flows. An activity flow is the actual path a person follows through the experience. For an eCommerce site, the activity flow typically starts with a search or a promotion that leads to a product index, then goes to the product itself before branching off depending on whether the person places a product in the shopping cart, wants to make a product comparison, goes to directly to checkout, or goes searching for something else. The goal of the activity flow is to map out most logical paths of different scenarios and make sure the person is taken only through necessary steps. At the end of this process, you should have a single flowchart that maps out all the explored scenarios and activity flows for the project. By combining them, you'll find that many flows or parts of flows overlap and you'll also likely find holes in the overall flows that need to be patched to ensure easy access across the entire solution.
- n architect is defined as a person who designs buildings to accommodate people and, in many cases, also supervises their construction. An information architect does much the same, only in a different context. They design structures that accommodate content, and in many cases, also supervise their construction. Information architecture is a science all its own, and many larger design companies employ their own information

architects, solely focused on that specialty. That said, information architecture is also an integral part of the overall content strategy of any project. The common definition of the term describes it quite well. Information architecture is the structural design of shared information environments, the art and science of organizing and labeling websites, intranets, online communities, and software to support usability and findability.

- The analysis and structure stage of the content strategy process produces a large volume of data that will become invaluable as your project progresses and matures. For a core resource, the resulting data can be found in the Inventory, Models, and Persona's spreadsheet and the Visuals slide deck.

5. Guides, Templates, and Workflows

- The voice and tone of a company or an organization must match the personality and attitude of that company. Otherwise, it will come off as disingenuous or forced, or even fake.
- The voice of a company or organization is typically defined using adjectives, friendly, professional, familiar, authoritative, jovial, straightforward.
- Style guides are a part of content strategy that overlaps closely with user experience and design, as well as voice and tone. The overall look and feel of a content has a significant impact on how the content is perceived, and when matched with voice and tone, we get a coherent experience that feels natural to the intended audience.
- A content strategy is often codified into a large document used by many people throughout the organization, but the majority of these people will not have the time to either read the content strategy in detail or seek out help from someone who knows it by heart. For the content strategy to be successful, it has to be understood and followed by everyone, and it's a good idea to invest time and energy in making this as easy as possible, and that's where examples and templates come in handy.
- Great content is rarely created by a single person and managing large volumes of content requires well-crafted work flows. When content is created and managed, it's not enough to focus on the content and it's quality alone. You also have to consider the time it takes, the costs involved and the people doing the work. At a high level, establishing effective content workflows starts with a series of questions. Who is creating the content? Who is editing that content? Who is approving the content? Where is the content added? How is the content added? How adds the content? Who publishes the content? And who manages the content once it's been published? When creating workflows, start by documenting existing workflows through interviews and observations of the content creation process. Once you have a clear picture of how content is created, draw a flow chart and invite the content creators and managers to provide input.

6. Creation and Management

- Establishing a sense of ownership of content internally can be as simple as granting ownership rights and responsibilities through roles and hierarchy and attaching incentives to creating and helping the creation of content that meets and exceeds expectations. Establishing a sense of ownership in the audience requires long-term strategies and a fair bit of luck, but it is possible, just look at Tesla.
- To produce content that is meaningful to your audience and brings them to your products and services, you need to speak to them at a deeper level. A good place to start this conversation is by asking the question: what are we doing with our content? If the project consists of creating an online storefront for basic products, simple product information and some marketing materials will do nicely. If the project involves a more elaborate outreach to established organization or a company as a thought leader, the content has to come from somewhere else. The role of content creator has changed over the past several years. Today, you're likely to find a product developer, internal UX designer, or HR manager in the role as content creator, and for good reason.
- I've heard stories of companies where the website is considered a side project for marketing. When establishing a content strategy, it's imperative that proper funding is part of the conversation from day one. Great content is an investment in the future, now more than ever. And like any vital part of an organization or a company, it needs proper funding and staffing. Returning to my analogy from earlier in the course, content strategy is a rolling ball that follows the path of the organization. To keep the ball rolling, make the content strategy an integral part of the overall business strategy. One key step in this process, is to make both the content strategy and ongoing content work both transparent and visible to all levels of management.
- Content strategy is a continuously evolving process and your content strategy, now nearing its first iteration, should be considered a living document that flexes and changes to the needs of the organization and its audience. For the content strategy to be effective, it has to have clearly stated and measurable goals. I talked about this in the beginning of the course and now we're looping back. During the creation and management phase, you can start measuring its success and see if these stated goals are met and exceeded. Monitor the success of the content strategy on two levels, internally, to see that the content strategy is implemented and works to make content ideation, creation, and management effective and goal-oriented, and externally, to make sure the content meets the needs of the audience and the goals of the organization. For the internal process, monitor the content creation and management process to make sure A, the content strategy is being followed, and B, the framework provided by the content strategy is working as intended. If the content strategy is new, allow some time for adoption and expect to make changes to fit theory with reality. Don't be surprised if some of the plans, or frameworks, or rules, or workflows, set out in the original content strategy, work better on paper than in real life and be ready to make modifications to improve the strategy assets being implemented. To measure the

internal success of a content strategy, look at time saved by following the set-out procedures and workflows, and look at the quality of the final output. For example, if one of the goals is to provide info that reduces the need for customer support or inquiries, do before after comparisons of time spent on these types of interactions. For the external process, metrics is your friend. For content published on the web, there are a myriad of tools available for metrics, both free and for pay. In their basic form, web analytics tools simply measure traffic, page views, and balance rates, but modern analytics tools can do a lot more with some configuration. To collect metrics on audience success, start with a stated goal of the content strategy and find tools to measure these goals. For an online store, measure how many steps a customer goes through before adding a product to their cart, how often a visitor does not add something to their cart, how many purchases are made from the front page or promoter products, how many customers return for additional purchases, and how many shopping carts are abandoned. For an informational site, measure how many steps a visitor goes through to get to the final destination, how long they stay on individual pages or views, how often a visit leads to a further interaction, what type of content is being shared through social media, and if certain important pages are ignored by the target audience. In the eyes of management and accounting, the value of the content strategy will be measured in internal cost productions and increased revenues through audience engagement. Putting systems in place to clearly show these successes will encourage continued investment in the content strategy and content production, and ensure the continued success of the organization. With metrics and analytics in place, and data coming in, get ready to start the process over again, rolling through each of the stages to fine-tune the content strategy based on this data and allow it to evolve as the organization, its audience, technology, and society advance.