SECOND EDITION

THE CONTENT STRATEGY TOOLKIT

Methods, Guidelines, and Templates for

GETTING CONTENT RIGHT

MEGHAN CASEY

New Riders

VOICES THAT MATTER™

FREE SAMPLE CHAPTER

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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 *superhero* 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 Welfle
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 Maijala
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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NEW RIDERS

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

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ACKNOWLEDGMENTS

I still can't believe I'm writing acknowledgments for a book that I wrote. But here we are…

Let's start with my Brain Traffic family: Kristina Halvorson (who always tells me I'm awesome and trusts me to do awesome work with Brain Traffic clients), Sean Tubridy (who designed the front of the book jacket and took my headshot and makes me laugh a lot), Tenessa Gemelke (who every year with Kristina brings together the smartest content strategy people on the planet), and Amy Pletch (who gives the best hugs and is always so happy to see me, or so she says).

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.

To Kev Walsh, I am so sad we never had the opportunity to work together again. You changed my perspective on collaboration between content strategy and development. I still can't believe you're gone.

Moving on to my comrades in the fight for liberation and justice… DiDi and staff and board of Done For DiDi; Shireen and the board at Stop Online Violence Against Women; Kay, Autumn, Monica, Gabi, and the rest of the board and staff at Voices for Racial Justice; Kevin, Kahlee, and the board at Until We All Are Free; Jason and The Institute for Aspiring Abolitionists; Northside Awesome Board of Trustees with reverence to Mr. Cottman; Valerie with reverence to Philando; Sumaya with reverence to Isak; Katy; Angela; Aisha C.; Aisha G.; Robin W.; Wintana; Aurin; Anika; Leslie; the Susans; Nitasha; Ann Marie and Mikka; the jail support, court support, encampment, and transportation crews; Montez, José, and our solidarity committee; and, of course, Minneapolis Twitter for speaking truth to power every single day.

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.

To Tony, thank you for your support these last 20 years. And for loving our doggies.

To the Jones, Universe, and adjacent families—Ayo, Niall-Julian, Kai, Riu, Lutalo, Kenna, Plaiqu, Anita, Ray, Valerie, and Mona—thank you for welcoming me with open hearts.

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

To my love, Warren, who brags about me behind my back every chance he gets.

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.

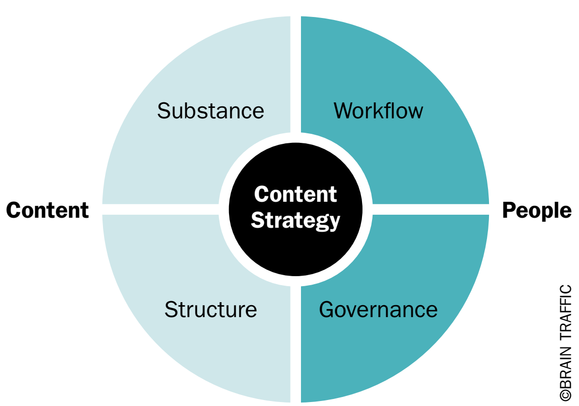
> "Content strategy plans for the creation, publication, and governance of useful, usable content."
>
> —Kristina Halvorson
> President of Brain Traffic and author of *Content Strategy for the Web*

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:

1. Go to www.peachpit.com/toolkit.
2. Sign in or create a new account.
3. Click Submit.
4. Answer the question as proof of purchase.
5. Click the Access Bonus Content link to download the Bonus Content from the Registered Products tab on your Account page.

If you purchased a digital product directly from peachpit.com, your product will already be registered.

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!

CHAPTER 6

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 stake-holders 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.

PLANNING THE INTERVIEWS

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.

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 printouts 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.

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.

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.

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