

Content Strategy

A practical guide

The basics

So what is
content strategy anyway?

Here's a good definition from the early days:

Using words and data to create unambiguous content that supports meaningful, interactive experiences...

**content strategy is to copywriting
as information architecture is to design**

*Content Strategy, The Philosophy of Data - Rachel Lovinger**

*She's a 'Fish!

Here's another more recent one:

**The analysis and planning to develop a repeatable system
that governs the management of content
throughout the content lifecycle**

The Language of Content Strategy - Scott Abel & Rahel Anne Bailie

To simplify GREATLY:

**Content strategy is planning how you'll
organize and prioritize content
to create the best possible user experience.**

And “content” is...?

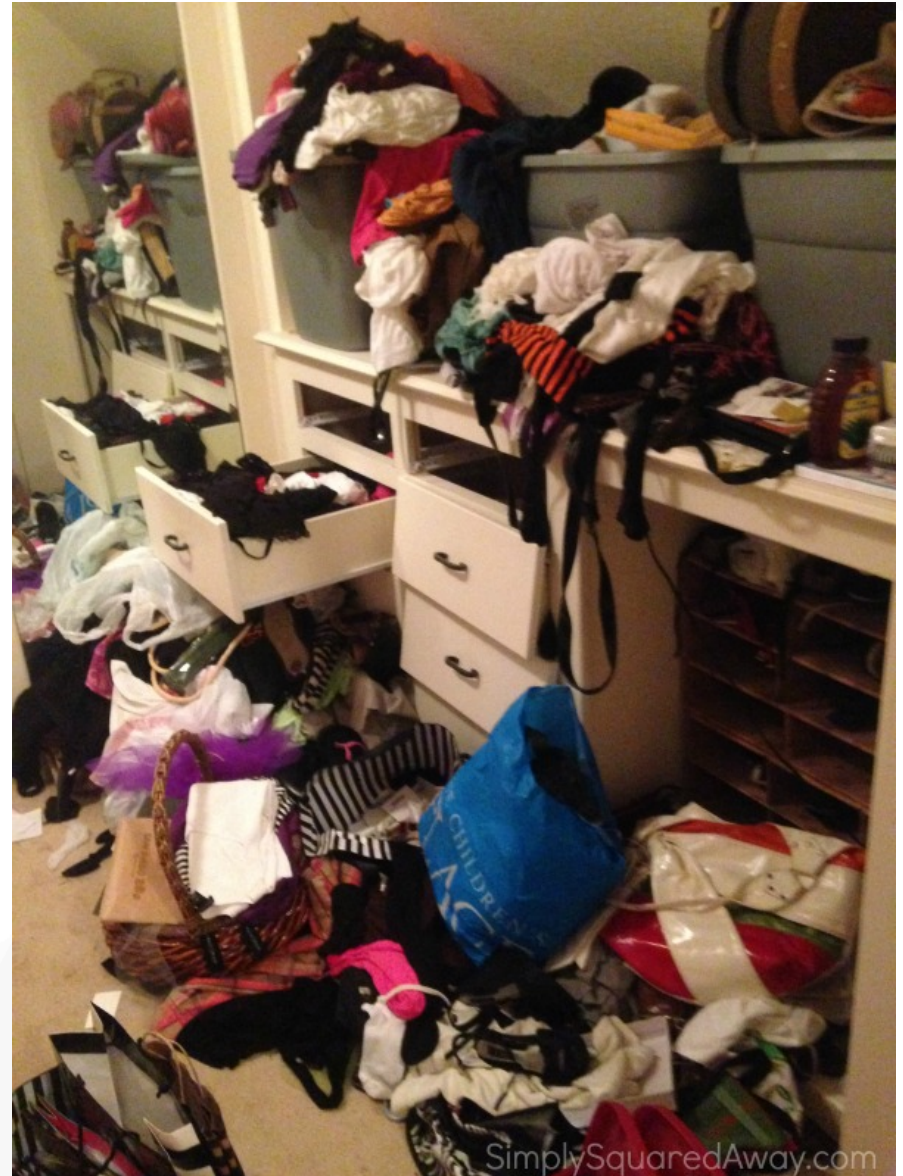
“Content” often refers to copy
but may also include attributes,
images and more

Does it need organizing
for the experience to make sense?

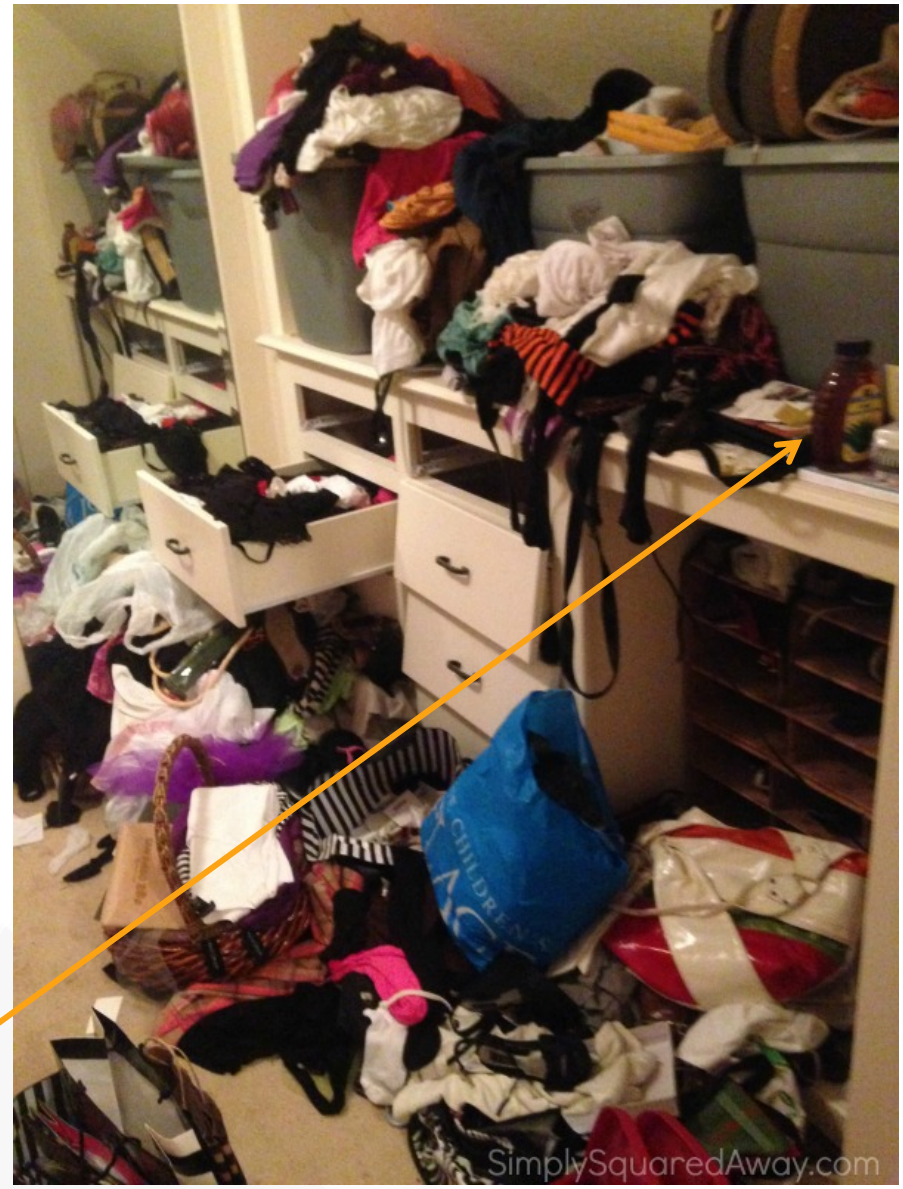
Then let's call it content.

An analogy we like...

Some clients
come to us
with site content
like this:



- Users can't find what they need
- The client doesn't even know all of what's buried or hidden in there
- Nothing is being shown off or prioritized
- The structure doesn't work for the stuff in it, so it's being misused (ahem, missing top drawers) or poorly augmented (are the giant grey tubs really helping?)
- It's hard to take care of anything in such a mess, so what you do find may not be in good shape
- There's things in there that don't belong-- and could even be damaging (I'm looking at you, *agave syrup*!)



We take that
jumble
and turn it
into this:



- We group like things together, in a way that makes them easy to find
- We help build a smart, attractive structure to store things efficiently
- We prioritize and showcase a few select things
- We put other things in handy containers— containers that let you know what's in them before you decide to open them (or not)
- Sometimes this means understanding where a client might need to put the stuff we don't want in here (we'd suggest the kitchen pantry for agave, for example)



And sometimes
there's a fair
amount of this:



OK, got the analogy.
But what does this mean
for real?

How we fit

First (and this is critical):
content strategy is a liaison role.

At Razorfish, that means
we often collaborate with

Strategy, UX, Creative and Technology,
playing the role of content experts
and advocates.

In the early stages of a project, we collaborate with **Strategy** to help with research tasks and assess proof points.

As the project moves forward, we ensure we map our content strategy pillars and tasks back to the vision and brand story.

As a content-focused part of the **UX** team, we contribute to the creation of hero flows and frameworks, bringing a content POV to ideation.

We serve as subject matter experts on current-state content and recommend content innovations.

We work with **Creative** to ensure they have the information they need to bring the pages to life without having to chase down details.

We work with **Technology** to understand what can be built, and get them the information they need to build it efficiently.

This includes providing CMS directives (the “words about the words”) to inform the back end.

These collaborations are a **two-way street** of both receiving and handing off information.



Our recommendations are always
based on research,
and we show our work.

Best practices and common sense
are a start, but we don't finish there.
We do our homework and report out
findings to provide value.

Some workflows

A sample content strategy workflow:

1

Discovery

Content Audit

Stakeholder
Interview
Synopsis

Competitive
Content Audit

2

Foundation

Content Strategy
Brief

Content
Migration Plan

Metadata
Strategy/Plan

Style Guide

Copydeck
Template

3

Detailed Design

Page Outlines

Component
Mapping

Link Strategy

Attribute Matrix

4

Execution

Copy Review

5

Maintenance

Playbook

Maintenance
Plan

1

Discovery

In this earliest phase, we're doing a lot of research, collecting current-state information to understand the problems we'll want to solve.

This includes reviewing current URLs, attending and documenting stakeholder interviews and looking at the competitive landscape (from a content perspective). We usually report out our findings in a Discovery deck.

2

Foundation

In this phase, we're documenting (and getting client consensus on) high-level content goals and the plan for reaching them.

This includes a Content Strategy Brief, the page-by-page plan for migrating current content (or not), voice and tone guidelines and a metadata strategy.

3

Detailed Design

Now's the time for tactical, page-level deliverables. Sometimes we share these out, sometimes they're just for us.

This is often in the form of a page outline that describes:
a) copy goals, b) SEO requirements, c) the components we'll use,
d) where links will go, e) any necessary tags.

4

Execution

This is usually a stewardship phase for content strategy.

We review the copydecks to ensure copy is delivering on strategy, the components and link direction still make sense, etc.

5

Maintenance

In this phase, we prepare a plan for the client to keep the new experience healthy moving forward.

This often includes a strategy for how to maintain content (including governance roles, calendars, etc.) and guidelines for creating content on their own.

What we deliver

Discovery deliverables

Content Audit

A content audit is a URL-by-URL review of current state.

To get started, we usually do a crawl and convert it to a spreadsheet. Then it's a lot of clicking and taking notes, assigning hierarchy and categories if possible. This is not the time to decide how we'll fix things. It's just a review of how things are.

*Clients sometimes say they already have this.
In my experience, we should do it ourselves anyway.*

Stakeholder Interview Synopsis

This is an output of stakeholder interviews and can take virtually any form, depending on the project and the client.

It must simply express what we heard.

This is a common task for content strategy; however, anyone with the time and ability could do it.

Competitive Audit

This is a review of the competitive landscape, usually expressed in a spreadsheet or a table.

Clients will tell us who their competitors are and what benchmarks we should be comparing against, but we should always be prepared to suggest as well.

*There will often be other competitive audits.
But we do ours from a content perspective.*

Foundation deliverables

Content Strategy Brief

This is a deck that expresses our Discovery findings and a high-level plan of action.

This should be more conceptual than tactical, so we sometimes have to resist the temptation to recommend specifics.

The main goal of the deck is to share out what we learned in Discovery and achieve consensus with the client on our recommended plan of attack.

Content Migration Plan

This spreadsheet provides recommendations for migrating current content into the new experience (or not).

To create it, we take the Content Audit we made in Discovery and go through it again, with all we've since learned in mind, adding a "recommended actions" column to each URL (migrate, delete, revise, consolidate), as well as a "notes" column stating our case for the action we recommend.

Metadata Plan / Strategy

Whether we're expressing how we'd deliver on a current metadata strategy or recommending how to create one depends on the structures the client already has in place.

Delivering on a current strategy can be done in the Migration Plan.

Creating a metadata strategy or taxonomy usually requires a separate spreadsheet and slides, to specifically call out categorization, provide rationale and show how it would work.

Style Guide

A Style Guide is a deck that contains best practices or client requirements for creative execution.

Having a Style Guide before writing copy is essential. It should be a simple deck containing high-level brand guidelines, user profiles, voice and tone goals, specific do's and don'ts and examples.

*Sometimes Creative will create the Style Guide.
And sometimes clients already have one for us to follow.*

Pre-production deliverables

Page Outlines

The Page Outline is a map for the content each page will need.

It should express content hierarchy, provide high-level copy direction, sources and keyword requirements, include any necessary tags, call out components and identify outbound links.

Sometimes this will require a separate client deliverable, depending on complexity and/or client familiarity.

If we are making wireframes for a page, we may not need a page outline. Pages that will not be wired definitely need one.

Detailed deliverables

Copydecks

The copydeck documents are owned by the copy team. They are most often reviewed and edited by content strategy.

Reviewing the decks helps ensure we deliver on original intent.

Sometimes copy review is performed by an ACD/CD.

Attribute Maps

In complex experiences, it may be necessary to create large behind-the-scenes matrixes, usually to express how content would automate.

Attribute maps are usually spreadsheets. Big ones. They must allow for every conceivable situation, clearly expressing the ‘if/then’ requirements for content to populate.

Sometimes content strategy helps create the map and someone else populates it, either on the client side or internally.

Maintenance deliverables

Content Maintenance Plan

This is usually a combination of a deck and spreadsheets that express how we recommend content be kept as good as we left it.

A content maintenance plan typically would contain guidelines for content refresh, governance models and identification of roles and responsibilities, best practices and a recommended editorial calendar.

Sometimes clients don't ask for this, but we should suggest it always.

Playbook

A Playbook is a description of the new experience from the macro to component level, as well as detailed instruction for how to use it.

The Playbook may be used for socialization, to explain strategy to interested peers or to direct users on how to source and submit content for future releases.

Sometimes clients ask us to create a Playbook, sometimes they only need us to contribute to it.

A bit o' philosophy

Someone once asked me,
“If we didn’t have content
strategy in the olden days, why
do we need it now?”

That person was my husband... sigh

Answer #1: Because putting logic behind choices takes time.

A content strategist must: assess all current content, recommend a new direction to solve problems, sell that plan to the client, document how we'll do it, tee up Creative and Dev for success and give the client a plan to help them keep it all ship-shape.

This involves a lot of deliverables.

Could others pick up these tasks? I think so.

But most team members I work with are too busy with their own deliverables to create mine. #whowantstodomycontentaudit?

Answer #2: Because sites are more robust today

Sites are bigger, more and more complex today than ever before.
And users are more sophisticated, with higher expectations.

So was content strategy necessary on a 5-page informational site with no
cart, no microsite links and just a phone number CTA?

Not as much.

On a site with thousands of product pages? You betchya.

Answer #3: Because not doing it is scary

Without focusing on content and creating consensus and a plan, you're basically winging it.

That makes it very hard to create copy with any level of consistency, hard for the client to defend the content to internal stakeholders and frighteningly likely the client will revert back to the exact same process that created the content you just fixed in the first place.

More deep thoughts

Content Strategy is a bad
career choice for the rigid—
you should expect (and get!)
a helpful collaborator

Having said that,
content strategists
aren't all former copywriters

OK, I am. But I've met plenty who aren't. Proceed with caution.

And if you're ever wondering,
“Does this project need a
content strategist?”

We can figure it out together.

Thank you