THE

CONTENT STRATEGY TOOLKIT

Methods, Guidelines, and Templates for GETTING CONTENT RIGHT

MEGHAN CASEY

Foreword by Kristina Halvorson, author of Content Strategy for the Web
THE CONTENT STRATEGY TOOLKIT

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MEGHAN CASEY
To help set things straight from the beginning, include in your charter or project management plan a list of words and phrases and their definitions for the project at hand.

I’ve been working on a project for a site that’s being built with Drupal (which I love). Drupal’s definition of module is way different than my outward-facing content definition. Some of my conversations with the development team were challenging until we agreed on how we’d use the word “module” moving forward.

**TIMELINE**

The timeline doesn’t need to be super detailed at this point. I usually just include the project start date, end date, and key dates or timeframes in between, such as times people should expect to review work in progress. Later, as you flesh out the timeline in more detail, you can append it to the charter (or electronically store it somewhere that’s accessible to everyone).

**BUDGET**

I like to include a little information about budget to help people understand the relative size of the project. A lot of the project charters I’ve come across don’t include budget information because it’s not information that’s shared broadly. So it’s really up to you.

If you’re hiring someone from the outside to do most of the work, you could just include the total budget for the work. If you’re doing the work internally, I suggest listing the number of hours you’re estimating it will take for each person or team. If it’s a combination of outside consultants and internal resources, you could do both.

You’ll want to include details about how the budget will be managed and how requests for additional hours or budget will be handled. So your budget section might look something like this:

The monetary budget for this project is $###,###,### for <vendor>, which includes <description of work to be completed>. Internal resources will also be used, and are estimated as follows: Team 1, **200 hours**; Team 2, **40 hours**; Team 3, **68 hours**. <Vendor> will provide a weekly summary of completed tasks and remaining budget. Internal resources will also summarize how many hours they’ve used each week. You will discuss any requests for more time or dollars in your weekly status meetings.
PROJECT TEAM

Use the charter or management plan to identify the project players and what will be expected of them throughout the project. You can use a matrix similar to the stakeholder matrix, but with fewer people and details. For example, you don’t have to include every stakeholder—instead include only the ones who will have day-to-day involvement in the project.

I usually include an overview of day-to-day team members with job descriptions. Then I create a matrix of tasks, such as managing the work, scheduling and performing logistics activities, doing the work, reviewing the work, and coordinating reviews and feedback from other stakeholders. Table 5.1 is an example of some tasks in a typical project team matrix.

**TABLE 5.1 SAMPLE PROJECT TEAM MATRIX**

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>JEFF, MARKETING MANAGER</th>
<th>LORNA, CONTENT MANAGER</th>
<th>JASON, LEAD CONSULTANT</th>
<th>COLLEEN, CONSULTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovery</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule stakeholder interviews.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct stakeholder interviews.</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with stakeholders to gather existing documentation.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create content inventory.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Strategic Alignment Summary.</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Strategic Alignment Summary.</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordinate the review process with other stakeholders, and compile feedback.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
REVIEW PROCESS

Consider including a short paragraph about how your review process for project deliverables will work. What I find most important to include here from an outside consultant perspective is details about how I would like to receive feedback.

I set an expectation that my client will coordinate reviews among the people that need to weigh in and compile the feedback before sending the results to me. If stakeholder feedback is conflicting, I ask my client to resolve it before sending final feedback along to me. I always offer to help resolve the misalignments—it’s another opportunity to keep people engaged and possibly uncover needs or goals previously unknown.

Other items you might include here are any tools or procedures related to reviews. For example, if you’re using Basecamp and the file will be posted, you might ask people to upload their files with comments to Basecamp.

COMMUNICATION

Include a section on how and when you’ll be keeping people up to date on your project. You might have a good idea about this if you already downloaded the Content Strategy Tool 3.2 in Chapter 3.

I suggest listing the ways you’ll be communicating, with whom, and at what frequencies. For example:

- Weekly status updates will be posted to Basecamp on Wednesdays.
- Weekly check-ins will be held on Tuesdays. <Team member> will include the agenda in the meeting notice and suggest who should be in attendance.
- The executive team will be updated monthly with an executive summary of work completed, work in progress, and feedback needed.

PLANNING

I covered a lot of planning-related stuff in the previous section. Here, I’ll go into a bit more detail about timelines and budgets.

TIMELINES

What you need to communicate in your timeline depends on who it’s for and what the intent of the timeline is. I think of timelines as a couple of types.
The first type is the very high-level timeline that shows project phases, important checkpoints, and the project end date. This type is usually more appropriate for people who won’t be involved day-to-day. It gives them just enough information to get a big-picture sense of what’s happening when.

I like to present these visually because it’s easier to comprehend at a glance.

A simple table can work well, too (Table 5.2).

<table>
<thead>
<tr>
<th>ACTIVITY/DELIVERABLE</th>
<th>DURATION</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct discovery (stakeholder interviews, documentation review, workshop), and deliver Strategic Alignment Summary.</td>
<td>Weeks 1–4</td>
<td>Brain Traffic</td>
</tr>
<tr>
<td>Review Strategic Alignment Summary, and provide feedback.</td>
<td>Week 5</td>
<td>Client</td>
</tr>
<tr>
<td>Compile core content strategy statement and supporting recommendations.</td>
<td>Weeks 6–10</td>
<td>Brain Traffic</td>
</tr>
<tr>
<td>Review core content strategy statement and supporting recommendations.</td>
<td>Week 11</td>
<td>Client</td>
</tr>
<tr>
<td>Create content outlines, and write content; review content outlines and content.</td>
<td>Weeks 12–20</td>
<td>Brain Traffic and Client</td>
</tr>
<tr>
<td>Enter content into CMS and test.</td>
<td>Weeks 21–25</td>
<td>Brain Traffic and Client</td>
</tr>
<tr>
<td>Launch</td>
<td>Week 25</td>
<td>Client</td>
</tr>
</tbody>
</table>
The second type of timeline is more detailed and more useful to the people working on the project day-to-day. It contains phases, activities, tasks, and sometimes even subtasks. It clearly defines who is doing the tasks and when they are happening. If you’ve ever used Microsoft Project, that’s the kind of thing I’m talking about (even though I don’t actually use that software).

I typically create a timeline in Microsoft Excel. But I’ve discovered that Google Docs has an add-on named ProjectSheet and an online application named SmartSheet that offer project planning templates. I recommend you experiment to find something that works for you. The **Content Strategy Tool 5.3** is the Excel-based template I borrowed from Emily Small.

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**TIP**

Be realistic when planning your project—don’t underestimate how much time you’ll need. Rushed content projects are rarely good content projects, especially if it’s a first attempt at demonstrating the value of content strategy. Starting with some padding is always better; you can make adjustments if there’s pressure to finish sooner.
CONTENT STRATEGY TOOL 5.3

DETAILED TIMELINE

Download the template and follow the instructions to create your own timeline.

TIPS

- Separate the project into discrete phases to make it easier to read.
- Pad discovery with a week or two to account for difficulties with schedules.
- Allow more time than you think you’ll need for reviews of deliverables.
- Note how the timeline will have to shift if milestones are missed.

WHERE TO GET IT

Download the template at www.peachpit.com/register.

WHERE IT CAME FROM

Emily Small, The Small Company (www.thesmallcompany.com); and Brain Traffic (www.braintraffic.com)

BUDGET

Tracking the project budget is probably my least favorite part of my job. I just want to do the best work I can, no matter how long it takes. That’s not always in the best interests of my employer or my client.

Figure out a method of tracking that doesn’t cause too many headaches but gets you the information you need. Consider the following examples.

FIXED-BID PROJECT

With a fixed-bid project, an agency or consultant provides a flat dollar estimate for the work to be done. They are paying for the value of the work provided. If you’re a consultant in this situation, you’ll want to divide the flat fee by the hourly rate you typically charge to get a sense of how many hours you have to work with.

With that number, you can estimate how much time to spend on each activity and deliverable. Your client isn’t really worried about how many hours you spend, but you likely need to be.