SECOND EDITION

THE
CONTENT STRATEGY
TOOLKIT

Methods, Guidelines, and Templates for
GETTING CONTENT RIGHT

MEGHAN CASEY

VOICES THAT MATTER™

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MEGHAN CASEY

New
Riders
VOICES THAT MATTER™

- 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

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 stake-holder 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?