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RVA Content Strategy September 2017

DOCUMENTING YOUR CONTENT STRATEGY



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CONTENT DOCUMENTATION IS SEXY



”

Happy 5th Birthday,
RVA Content Strategy!

DOCUMENTING YOUR CONTENT STRATEGY

Nice to meet you :)





**Professional
Builder**



JOURNALISM

B2B

ASSOCIATION

B2C

USER EXPERIENCE

CUSTOMER EXPERIENCE

ECOMMERCE

PRINT, DIGITAL, IN-PERSON

TELL ME ABOUT YOU

DOCUMENTING YOUR CONTENT STRATEGY

Vocabulary check



Content strategy is ...

- **Determining the best way to present information to your audience so that it's valuable and makes them want to come back for more.**
- **Figuring out a way for content to meet business and user needs.**
- **Figuring out the right content for the right time for the right person -- and what it'll mean to maintain and govern it too.**

To apply content strategy ...

- ◎ **You research to understand your audience and what they need to know, then deliver the message in a way that's accurate and makes sense to your average Jane. (It's gotta sound like your company too.)**
- ◎ **You think holistically and make sure cross-disciplinary stakeholders have a seat at the table.**
- ◎ **You think through content and what it takes to maintain it so what you put in front of customers is great on day 1 and 375 alike.**

”

At Capital One, we say
we design conversations
to solve customer
problems.

Capital One's Content Strategy Pillars

How every person at Capital One can design experiences that feel like real conversations.

- 1 **Natural Language**
- 2 **Use Case**
- 3 **Relevant Context**

”
We apply 3 pillars when designing what to say, to whom, when, and how.

| What we'll cover today:

- **Warmup: Content strategy in action!**
- **Why we should document stuff**
- **What we risk when we don't**
- **How to do it simply and efficiently**
- **Practice**

DOCUMENTING YOUR CONTENT STRATEGY

Let's start with a conversation



THE BUSINESS:

An eco-friendly, relaxed,
high-end resort & day spa



THE PROBLEM:

The current site is incomplete.
It's hard for customers to find information they need to help them choose a resort.

This means the resort gets a lot of email, takes a lot of calls, and relies on third-parties to explain their experience.

Boo. (But it looks great!)

THE PROJECT:

We're charged with
overhauling the site's
content.

THE QUESTION:

What would a conversation
sound like between a
potential customer and the
resort?

Use conversation bubbles to get a project started

- **Pair up or triple up!**
- **Write what a conversation would sound like between a potential customer who's comparing resorts and the resort itself.***
- **Capture how you'd say it in person; use human language. Don't worry about word-smithing.**

THE QUESTION:

What would a conversation sound like between a potential customer who's researching for a vacation and the resort?

LISTENING

Let's read aloud our
conversations.

”

Think of the things you heard. What did you like, and why?

”

What didn't you like?

”

Can you spot ideas for
the resort itself?

”

Can you spot specific info
you should include on the
site?

”

Can you spot guidelines
for anyone creating
content for the site?

”

Can you spot copy you
can use?

WHAT IF ...

- We were all in the same room but heard different things?
- People on the project changed?
- An agency picked up the work?
- We launched the site and needed to update it — and we're still new to maintaining it?

”

How can I make sure
everyone's on the same
page?

”

What can I do to make
sure this work doesn't go
to waste?

”

How can I get this new
person or agency up to
speed?

”

How can I help maintain
this quality?

DOCUMENTING YOUR CONTENT STRATEGY

The answer



”

Your goal:

Capture your content
strategy *in some form*

”

Do NOT wait for:

- Anything to be finished
- Someone to ask for it

”

Your goal:
Capture what someone
would need to build off of
your work.

What should you capture?

1. Your content strategy: a statement on how you'll use content to meet user + business needs.

1. This can be for an entire site, a section, a page, a space, a template, or a component.

2. Guidelines to hand someone creating content

3. Guidelines on how to maintain it

4. KPIs — or how you know content is doing the job it set out to do

5. Who does what, and where it fits into how people work

Ways to capture it

- 1. High-level overview docs** - great for checking alignment after analysis.
- 2. Guideline docs** - these get into detail and help someone creating content fresh and those maintaining it.
- 3. Workflow or process maps** - great for technical projects and figuring out how to work together.
- 4. User content flows** - These can be detailed or high-level. They show page flow and content in them. They keep folks creating content focused! (See “Communicating User Experience”)

DOCUMENTING YOUR CONTENT STRATEGY

Examples



Content Strategy Overview

This answers, "So what is your content strategy?" or "So what ARE you doing with the site?"

Capture this after your discovery work and analysis but before creating content

- Statement/Mission/Purpose of the project or space
- Who this is for (your audiences)
- End game for the user
- What support users need
- High-level biz requirements
- KPIs
- Required elements

Good for: Synthesizing lots of things for alignment within and across teams

PROJECT NAME
 CONTENT STRATEGY AND REQUIREMENTS DOC
 --revisions listed here with date--

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- A list of high-level key needs

What are the KPIs (how we'll know our content is successful):

- Select KPIs that are measureable

Required elements, prioritized to reflect hierarchy:

- The list details specifics that need to be included to make the page/project successful, i.e. "A large image of the phone screen so users can see what the interface will look like."
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Content Requirements

This answers, "So what am I supposed to create here?"

Homepage content requirements

Content strategy: We will design and curate a responsive homepage for [redacted] that introduces users to what's going on and what we have to offer while providing a clear gateway to our products, support, and community.

[Note: The content strategy should be updated to specifically spell out our direction, i.e. tell the clear [redacted] story]

Must haves	All [redacted] sites need these content elements at a minimum.	Content types + maintenance LOE	Success looks like ...
Big story (1)	<p>This is the most important thing the company wants users to know:</p> <ul style="list-style-type: none">- Major campaign [redacted]- Major announcement [redacted]- Major sale (Cyber Monday) <p>We need to be able to showcase multiple products 2-5 during one big announcement too.</p> <p>This space needs to accommodate as few as 2 big stories and as many as five to account for multiple "big stories" (ex: multiple product launches) at one time.</p> <p>If there isn't a major announcement happening, we</p>	<p>Images, video (if text included for context), text, CTA button for each component of the big story</p> <p>Medium-High LOE for maintenance. Because the hero is reserved for major "news," it would be updated less frequently.</p>	<p>Users can point to the hero spot as the most imp. on the page.</p> <p>Users understand their next step.</p> <p>Click-throughs to next step.</p>

Capture these to get into specifics about what the content solution needs to include.

- Specific elements that a project or space must have — or are optional
- Enough direction so a designer or content creator understands what the solution should accomplish
- Recap the content strategy too

Good for: The team who will b

Content Requirements

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Content Strategy Guidelines

This gets into the nitty-gritty for folks who are thoughtful about what they create (or the people who nit-pick for the sake of it).

These explain the framework to folks who will be maintaining it (or other people who need to know)

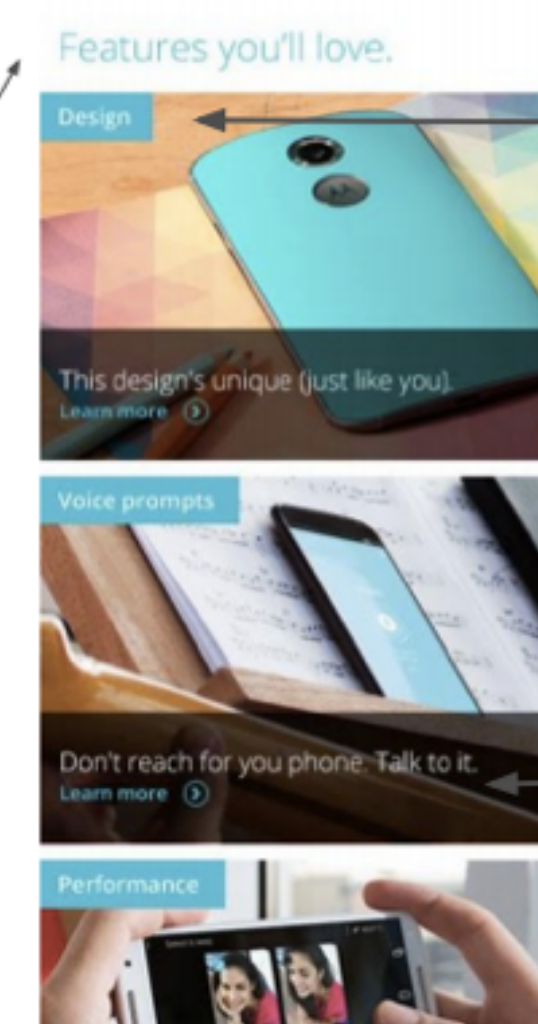
- Statement/Mission/Purpose of the project or space
- Each space's purpose - *what should go in the box*
- Any maintenance guidelines

Good for: Post-design. Handing off a project and training people how to implement your strategy and design.

Features section content strategy - Mobile, expanded

The **features section** highlights 2-8 key features for a product. This forces us to focus on which features are truly differentiators and most important to users.

The **section headline** identifies what the section is about and aids in wayfinding (confirmed in user testing). We infuse a touch of emotional language while using the understandable word "features."



The **feature labels** are purposefully utilitarian, using popular keywords to aid in wayfinding. This approach was confirmed by users in testing.

Each feature section includes **teaser text** to help users quickly understand the feature without revealing too much, so it implores them to learn the full story. We infuse personality here purposefully.

Features section content strategy - Mobile, expanded

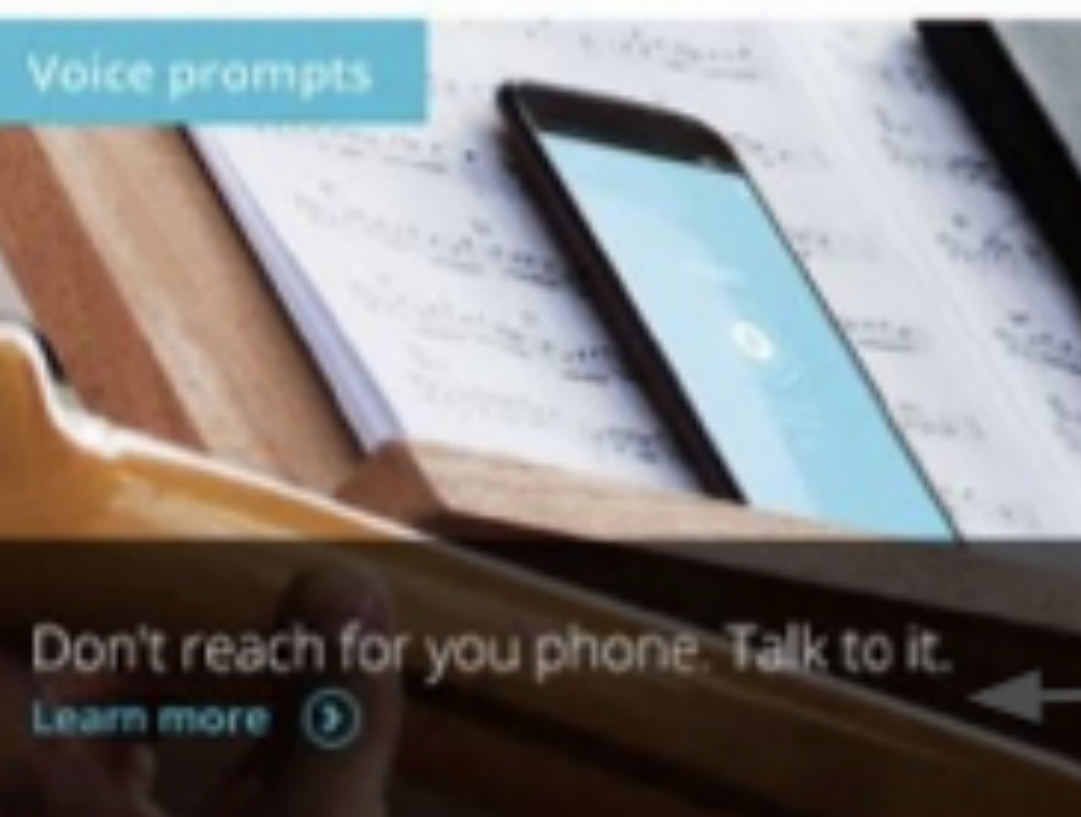
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Features you'll love.



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Writing Guidelines

This answers, “So, what are your voice and tone guidelines? And what should I make sure to do with my writing here so it sounds like what we want?”

What makes the organization’s writing unique

- Take it beyond style decisions and basic writing tips (not that they shouldn’t be included somewhere).
- Start small and simple: a 1-2 pager is better than nothing.
- Style guides can be overwhelming to think about. To tackle it, make it an ongoing project everyone can contribute to over time, but be sure to assign specific responsibilities.
- Reach out to others in the organization to collaborate, borrow, and share.

Good for: Writers and anyone editing them.

Guideline	?s to ask	Example 1	Example 2
Use natural language Conjunctions are good. Second person is good.	How would I say this to someone I care about? Is this how people really talk? Do I sound human, or do I sound like a machine?	<i>Your payment went through.</i> Not: <i>Your payment has been processed</i>	<i>Enter a 10-digit phone number</i> Not: <i>Invalid phone number</i>
Include details for the specific use case This keeps details focused on a detailed goal.	Am I giving information to complete the sentences, "How can I .." or "Now I can..."	<i>As a safety check, upload a bank statement or driver's license to verify your business' identify.</i> Not: <i>Provide documentation before proceeding.</i>	
Include relevant context This helps identify triggers and also helps answer why we're communicating what we are.	Can I complete the sentences, "I need to know this when ..." or "I'll know this when...?"	<i>Because you've been inactive for 5 minutes, we signed out your account to keep it safe.</i> Not: <i>You must sign in again.</i>	

Writing Guidelines



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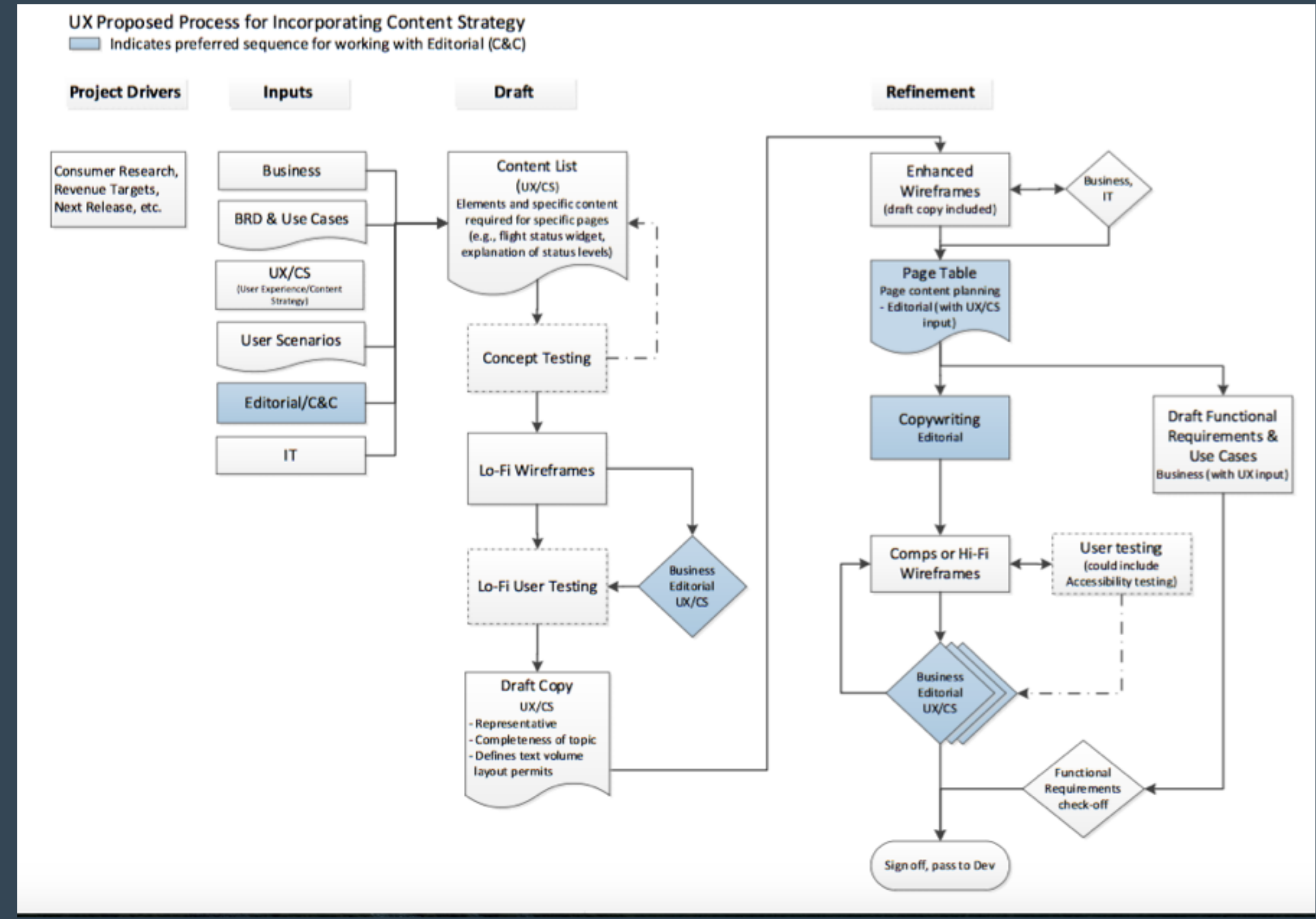
This shows you've got an answer for how to work together.

Workflows & Process Maps

If you're in an org where people things are changing and people are figuring out how to work together, you'll end up doing this.

- Steps for how content strategy fits into an existing process
- Who does what and when in regard to content for a project or process

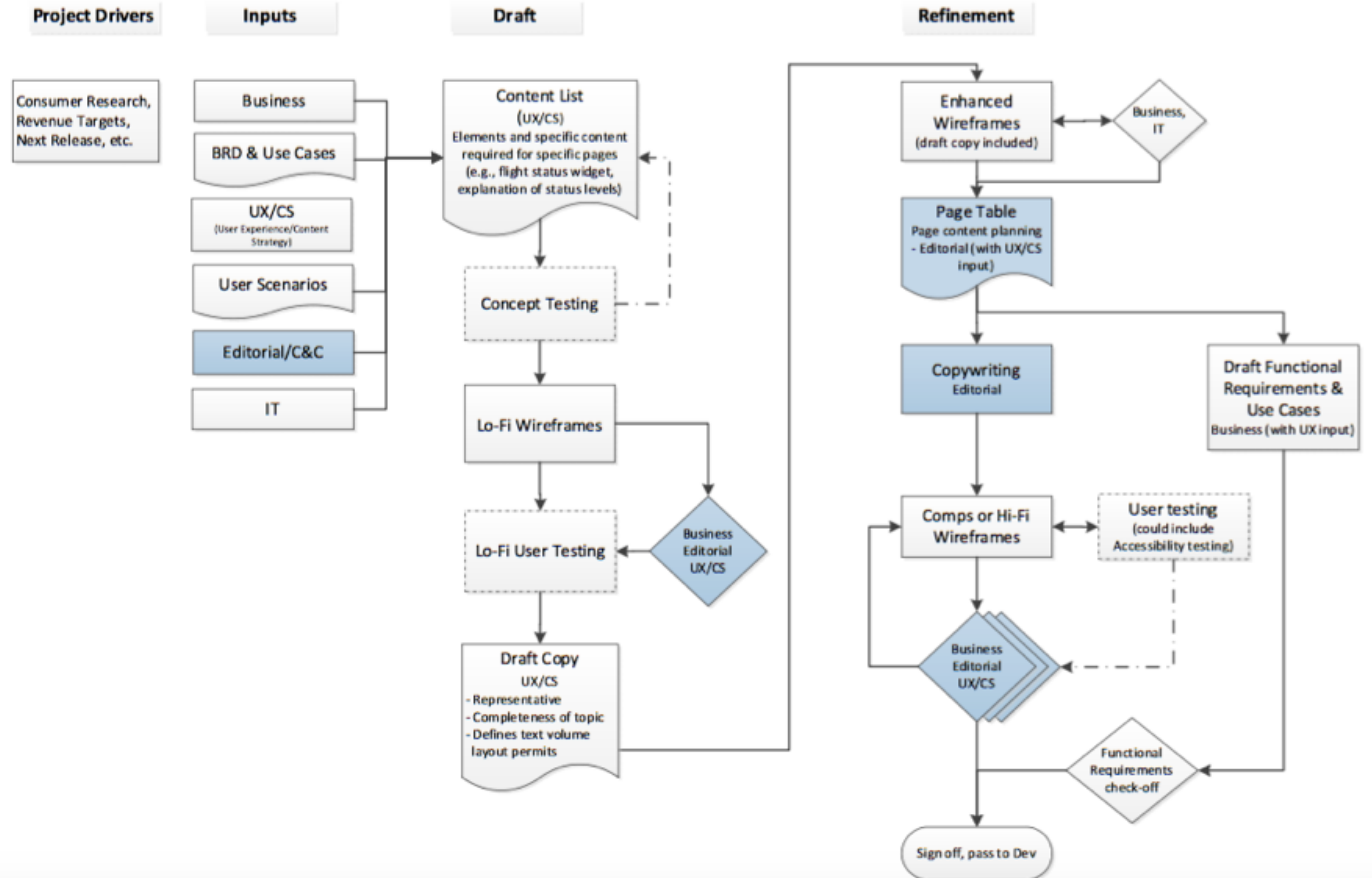
Good for: Team alignment; new teams; change management



Workflows & Process Maps

UX Proposed Process for Incorporating Content Strategy

■ Indicates preferred sequence for working with Editorial (C&C)



DOCUMENTING YOUR CONTENT STRATEGY

Let's practice



BACK TO THE RESORT

- Regroup
- Complete each section of the Content Strategy Overview format. Take creative liberty to build on details. Keep it high-level.
- Finish early? Come up with a plan to socialize it with key stakeholders who aren't already present

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”

How did that feel?

Tips for using the Overview Template

- 1. Set expectations with stakeholders using it:** It's purposefully high-level, it's for alignment, there are more details you'll need to execute on the strategy, how the team will use it, etc. OR: "I'm not sure how to use it, but let's try it!"
- 2. Don't complete it in a silo.** Work with a key partner outside your team. Then socialize it broadly. The buy-in will speak volumes.
- 3. Stakeholders reviewing it should see familiar information.** Avoid surprises.
- 4. Consider drafting it early and then revisiting.**
- 5. Use it.** Update as necessary — *if it makes sense*. Your lessons and updates might be better served in documentation from later in your project work.

CONTACT AND FIND ME

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Thanks a bunch.
Any questions?

