

THE CONTENT STRATEGY TOOLKIT:

Methods, Templates, and Guidelines for Getting Content Right

Hi. This is a list of all the tools in The Content Strategy Toolkit. A lot of them are in the folder you just downloaded. But, some of them live on the Internet. In those cases, I've provided a link to their location. For the ones in this folder, you can click on the file name in this document to open them or just look for the file name in the folder.

CHAPTER 1: Identify Problems and Opportunities

1.1 Audit Spreadsheet.....Page 8

Use the audit template workbook so you don't have to start from scratch. It contains templates for the audit sheet (where you collect your data) and a fancy summary sheet with formulas that pull in data from your audit sheet(s).

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 1.1 Audit Spreadsheet.xls](#)

1.2 A Super Simple User TestPage 9

The fine folks at GOV.UK have been rocking content strategy and content development for several years. This super simple user test gives some great insights about your content.

Source: Pete Gale (@pete_gale)

Location:

userresearch.blog.gov.uk

CHAPTER 2: Convince Leaders and Get the Resources

2.1 Making the Case Presentation Starter DeckPage 20

Use the presentation outline deck to provide some inspiration and get you started. It follows Toumlin's Model of Argumentation and contains some example content to illustrate it.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 2.1 Making The Case Presentation Starter Deck.key](#)

[Tool 2.1 Making The Case Presentation Starter Deck.ppt](#)

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CHAPTER 3: Get Stakeholders On Board

3.1 Stakeholder MatrixPage 31

Use the stakeholder matrix to list and label your stakeholders, record how you'd like to get information from them, and make notes about topics, concerns, and your pitch. The last page is a table where you can record stakeholder interview times and key takeaways from your discussion.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 3.1 Stakeholder Matrix.docx](#)

3.2 Communications Management Plan.....Page 35

Use the Communications Management Plan to help you think through how to keep your stakeholders in the loop. The plan contains a lot of information, some of it is similar to what's in this chapter and some of it is different. Use the pieces from both that make sense for you.

Source: Project Management Docs (www.projectmanagementdocs.com)

Location:

[Tool 3.2 Communications Management Plan.doc](#)

CHAPTER 4: Set and Align on Project Objectives

4.1 Objective Alignment Session PlanPage 41

Use the example agenda and plan to kick start your preparation. Included in the plan are exercise instructions and visuals and a template for the Individual Exercise worksheet.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 4.1 Objectives Alignment Session Plan.doc](#)

4.2 Project Kick-off EmailPage 43

Kick off your project by getting stakeholders excited about the work and letting them know what to expect. Use the example email as a starting point.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 4.2 Project Kick-off email.docx](#)

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CHAPTER 5: Run the Project

5.1 Project Preparation ChecklistPage 48

Use the sample checklist to help you think through important considerations and track your progress on project preparation tasks.

Source: Emily Small, The Small Company (www.thesmallcompany.com)

Location:

[Tool 5.1 Project Preparation Checklist.doc](#)

5.2 Project Management PlanPage 50

Use the project management plan template, and complete it for your project. As always, tweak it to meet your needs. It doesn't contain everything I've noted you could include, so add or delete anything that makes sense for your project.

Source: Nancy Lyons and Meghan Wilker, Clockwork (www.clockwork.net)

Location:

[Tool 5.2 Project Management Plan.pdf](#)

5.3 Detailed TimelinePage 57

Keep your project on track, and communicate milestones with your team. Use the template and follow the instructions to create your own timeline.

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

Location:

[Tool 5.3 Detailed Timeline.xls](#)

CHAPTER 6: Understand Your Business Environment

6.1 The Business Model CanvasPage 67

Download The Business Model Canvas to start pulling together information about how your company makes and spends money.

Source: Strategyzer (www.strategyzer.com)

Location:

www.businessmodelgeneration.com/downloads/business_model_canvas_poster.pdf

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6.2 Stakeholder Interview Guide.....Page 73

Prepare for successful stakeholder interviews by thinking through your questions in advance. Use the interview guide as a starting point for creating your own.

Source: Kim Goodwin, [*Designing for the Digital Age*](#)

Location:

[Tool 6.2 Stakeholder Interview Guide.doc](#)

6.3 Discovery Insights Workbook.....Page 77

Use the Discovery Insights Workbook, which contains an inventory sheet and an insights sheet, to set yourself up for a successful documentation review.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 6.3 Discovery Insights Workbook.xlsx](#)

CHAPTER 7: Learn About Your Audience and Users

7.1 User Understanding Matrix.....Page 83

Use the matrix and use it to record your user research questions and rationale for answering them so you can start a conversation with your stakeholders.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 7.1 User Understanding Matrix.doc](#)

7.2 User Research Workshop Activities.....Page 90

Use the sample workshop plan to get more specific instructions and templates for conducting a user research workshop session.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 7.2 User Research Workshop Activities.doc](#)

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CHAPTER 8: Get Familiar with Your Content

8.1 Content Landscape List.....Page 97

Use the spreadsheet to keep your list of relevant web properties and other content channels.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 8.1 Content Landscape List.xls](#)

8.2 Sample User TestsPage 108

Use the sample user tests for descriptions of tests (and instructions) you can use to get insights about your content.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 8.2 Sample User Tests.doc](#)

CHAPTER 9: Review How Work Gets Planned and Done

9.1 Job Time Worksheet.....Page 114

Use the worksheet to collect information about how people working on content spend their time.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 9.1 Job Time Worksheet.xls](#)

9.2 Planning and Process Workshop ActivitiesPage 117

Use the workshop activity details to get specific instructions and templates for conducting a workshop on planning and process.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 9.2 Planning and Process Workshop Activities.doc](#)

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CHAPTER 10: Put It All Together

10.1 Strategic Alignment Summary Starter DocumentPage 128

Use the starter document so you don't have to start from scratch. It contains an outline based on this chapter's discussion along with some questions and considerations to help you put your document together.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 10.1 Strategic Alignment Summary Starter Document.doc](#)

CHAPTER 11: Create a Content Compass

11.1 Core Strategy Statement Mad Lib.....Page 142

Use the document to get a printable worksheet version for in-person sessions and a fillable Mad Lib version you can email to your stakeholders.

Source: Brain Traffic (www.braintraffic.com) adapted from a Mad Lib by Sara Wachter-Boettcher

Location:

[Tool 11.1 Core Strategy Statement Mad Lib.docx](#)

11.2 Messaging Framework Template.....Page 146

Use the template for an editable, visual version of the Messaging Framework shown in Chapter 11.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 11.2 Messaging Framework Template.docx](#)

CHAPTER 12: Decide How You'll Measure Success

12.1 Data Sets You Free PresentationPage 150

Download the presentation for an abundance of information, tips, and additional resources.

Source: Jonathon Colman (www.jonathoncolman.org)

Location:

www.slideshare.net/jcolman/data-sets-you-free-confab-2013

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12.2 Heuristic Framework Cheat SheetPage 151

Use the framework for a cheat sheet on heuristic assessments. You'll need to zoom in to review the details.

Source: Abby Covert (www.abbytheia.com)

Location:

[Tool 12.2 Heuristic Framework Cheat Sheet.png](#)

12.3 Content Scorecard Report Sample.....Page 157

Use the sample for ideas on how to put together your own content measurement report.

Source: Kathy Wagner, Content Strategy Inc. (www.contentstrategyinc.com)

Location:

[Tool 12.3 Content Scorecard Report Sample.pdf](#)

CHAPTER 13: Design Your Content

13.1 Content Prioritization TemplatesPage 163

Use the templates to think through and communicate content priorities to your team.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 13.1 Content Prioritization Templates.doc](#)

13.2 Core Model Instructions and Worksheets.....Page 172

Review the [workshop instructions](#) and use the worksheets to facilitate a core model workshop on your project.

Source: Are Halland, Netlife Research (<http://netliferesearch.com>)

Location:

[Tool 13.2 Core Model Worksheets.pdf](#)

13.3 Content Model Spreadsheet.....Page 179

Use the template to make your list of content components, and assemble them into pages or views.

Source: Eileen Webb, Webmeadow (www.webmeadow.com)

Location:

[Tool 13.3 Content Model Spreadsheet.xls](#)

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13.4 Content Overlay and Page Table TemplatesPage 181

Use the template to get started with content specifications.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 13.4 Content Overlay and Page Table Templates.doc](#)

CHAPTER 14: Create On-strategy Content

14.1 Roles and Responsibilities Matrix.....Page 189

Use the roles and responsibilities matrix example as a template to document content tasks and who is accountable for them.

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 14.1 Roles And Responsibilities Matrix.doc](#)

14.2 Card-sorting Exercise Instructions and CardsPage 196

Read pages 28–34 of the excerpt from *Content Strategy at Work: Real-world Stories to Strengthen Every Interactive Project* for instructions and a list of words. Or, buy a set of cards with instructions at www.appropriateinc.com.

Source: Margot Bloomstein, [*Content Strategy at Work: Real-world Stories to Strengthen Every Interactive Project*](#)

Location:

[Excerpt from Content Strategy at Work: Real-world Stories to Strengthen Every Interactive Project](#)

[Set of cards for purchase](#)

CHAPTER 15: Govern, Plan, and Maintain Your Content

15.1 Content Strategy Skillsets.....Page 204

Review the table of skillsets to make sure you have the necessary roles and responsibilities covered.

Source: Melissa Breker, Content Strategy Inc. (www.contentstrategyinc.com)

Location:

[Tool 15.1 Content Strategy Skillsets.doc](#)

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15.2 Editorial Calendar TemplatesPage 214

Review the collection of templates to find one that works for you (or will work with some modifications).

Source: Brain Traffic (www.braintraffic.com)

Location:

[Tool 15.2 Editorial Calendar Templates.xls](#)