# Planning and Process Workshop Activities

I use the following exercises—or variations of them—to understand how content work is planned and done within the organization.

## Content Decision-making Exercise

Start by brainstorming a list of content projects that have been done or proposed in the last six months to a year. These projects can be anything from adding content for a new product to fixing broken links throughout the website.

Once you have the list, create a matrix on the wall (or project it to a screen) to use as a scorecard for evaluating each project. Then, describe the scoring system you’ll use: 3=High, 2=Medium, 1=Low. Evaluate each of the projects you’ve brainstormed for several criteria. I often use business impact, user need, effort required, and anticipated ROI. Total the points for each idea. Here’s an example (yours will probably have more rows):

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Project Description | Done/  Proposed | Business Impact | User Need | Effort Required | Anticipated ROI | Total |
| *<Project description>* | Done | 2 | 1 | 3 | 2 | **8** |
| *<Project description>* | Done | 3 | 3 | 3 | 2 | **11** |
| *<Project description>* | Done | 1 | 1 | 2 | 1 | **5** |
| *<Project description>* | Done | 2 | 2 | 1 | 2 | **7** |
| *<Project description>* | Proposed | 3 | 1 | 2 | 1 | **7** |

To work through the scorecard, ask one participant to suggest the score for each criterion and then invite discussion. If there is no discussion, the score suggested stands. Go through this fairly quickly.

Once the scorecard is complete, facilitate a discussion to understand:

• What projects might they have done or not done based on the scorecard and discussion?

• What do participants believe led the organization to make the decisions they did for the projects that were done but perhaps should not have been or weren’t done but perhaps should have been?

## Workflow Exercise

Start by listing across a big white board (or several wall stickies) the typical stages involved with the content lifecycle. I usually use Plan, Create, Review, Approve, Publish, and Maintain. Then, for each step, have the group document each step of each phase (one stage at a time) on sticky notes.

As they define each step, ask them to also document who does the step, what tools or technologies are used to complete the step, how long the step typically takes, and what the result or output of the step is. After they’ve done this for all steps, facilitate a discussion about what in the process is going well and where there are roadblocks or painpoints. On the whiteboard or wall stickies, mark what is going well with green asterisks, and mark the roadblocks or painpoints with red asterisks. Take notes on the discussion for later analysis.

The end result might look something like this:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Plan** | **Create** | **Review** | **Approve** | **Publish** | **Maintain** |
| *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* |
| *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* |
|  | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* |  | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/ Tech>* * *<Output>* |
|  | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/Tech>* * *<Output>* |  |  |  | *<Step >*   * *<Who>* * *<How Long>* * *<Tool/ Tech>* * *<Output>* |