Content Strategy

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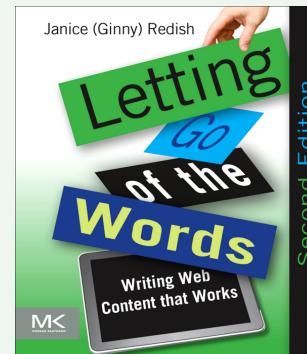
www.redish.net

@GinnyRedish

Ginny Redish

2nd edition
Elsevier, 2012
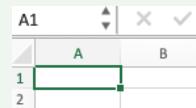
Virtual workshop
Plain Language Summit 2020
October 28, 2020

Topics for this session
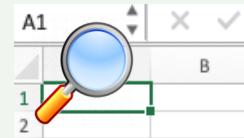
- Differentiating strategy and tactics

- Defining content strategy

- Considering scope and topics for a content strategy

- Creating your content strategy:
  Discover, Plan, Align, Use, Govern

- Using the strategy – tips on tactics

- Time for your questions and comments

People tend to talk about the tactics

Inventory the content

Audit the content

Hire and train writers, editors

Set and follow an editorial calendar

Write, edit, design, publish

But tactics are different from strategy.
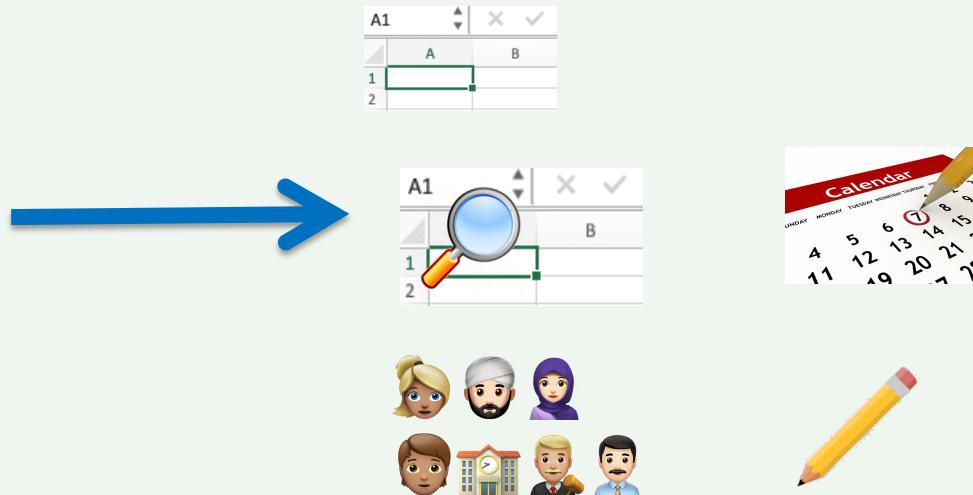
Strategy drives the tactics

Before you use the tactics,
you must know what you are trying to achieve.

The strategy is the **blueprint** for using the tactics.

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Defining content strategy – 1

Content strategy guides your plans for the creation, delivery, and governance of content.

Kristina Halvorson
and Melissa Rach
Content Strategy for the Web
2st edition, New Riders, 2012, p. 28

Defining content strategy – 2

Content strategy
is about managing and optimizing
content to meet business goals
by being findable, usable, and
actionable.

Margaret (Pegi) Black
How is *Content* Strategic? and How is Content *Strategic*?
Content Strategy DC, 3/28/19

Defining content strategy – 3
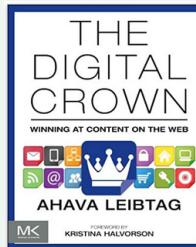
Content strategy

Thinking strategically about your content

Aligning content with the organization's goals while meeting users' needs

Ginny Redish
In many workshops
through the last decade
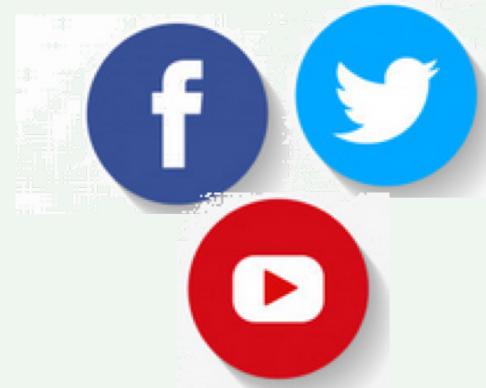
Also see Ahava Leibtag
The Digital Crown

What content should a content strategy cover?

Any collection of content –
   broad or narrow
   digital, print, (preferably both)

An example of scope: Minnesota Revenue

Problem: Too many phone calls about letters to taxpayers

Scope: Letters to taxpayers
(later expanded to web, customer service, etc.)

Discovery: Letters to taxpayers were not in plain language

Success: Fewer phone calls

ClearMark award (finalist, 2016)

Governor Dayton issued an Executive Order for all agencies to use plain language

https://mn.gov/gov-stat/images/EO-14-07.pdf

Terri Steenblock, then at MN DOR
Melissa Donndelinger, then at MN DOR
Ginny Redish

ClearMark finalist – original letter

Subject: Notice of intent to offset

Our records show that you owe a state debt to the Minnesota Department of Revenue. If this is a joint debt each debtor may receive a separate notice.

Debtor name: ADAM LAST
Debt type: 2009 Individual Income Tax - Audit
Amount due: $1,541.63

We intend to file a claim with the U.S. Treasury Offset Program for this amount. This federal program allows the Department of Revenue to claim your federal tax refunds and federal non-tax payments and apply them to your debt. Some non-tax payments, such as social security are ineligible for offset. The U.S. Treasury will only send us your payments that are eligible for offset by federal law. In addition, they will deduct a fee for each transaction before they send the payment to us. The U.S. Treasury sets the amount of this fee and may change it annually. We may have already filed a claim with this program for other state debts you owe.

Having an active payment agreement will not prevent us from filing a claim. If your federal tax refund and/or federal non-tax payment applies to your debt, your payment agreement may end earlier than scheduled. Your payment agreement will automatically end when either you no longer have a balance due with the Department of Revenue or all scheduled payments have been requested. If you currently have a payment agreement in place with the Department of Revenue, continue to follow the terms of the agreement.

To avoid this claim from being filed, you must pay the amount due in full immediately.

Options for making payment:
- **Electronically debit your bank account** - pay online at *www.revenue.state.mn.us* or call 1-800-570-3329. There is no charge to you for using this service.
- **Major credit card** - log into the Value Payment Systems website at

ClearMark finalist – revised letter from a well-planned content strategy

The Minnesota Department of Revenue may take your federal payments

Debtor: TEST TEST
Debt Type: METRO STATE U General Accounts Receivable

Amount Due: $801.42

Why can you take my federal payments?
When you owe a state debt, the law allows us to take certain federal payments to pay your debt.

Note: Each person responsible for paying this debt may receive a copy of this letter.

Will you still take my federal payments if I already have a payment agreement?
Yes. The terms of your payment agreement include collecting federal payments and refunds to pay your state debt. Your payment agreement will continue as scheduled.

What federal payments can you take?
We can only take payments allowed under federal law. Some examples are below.
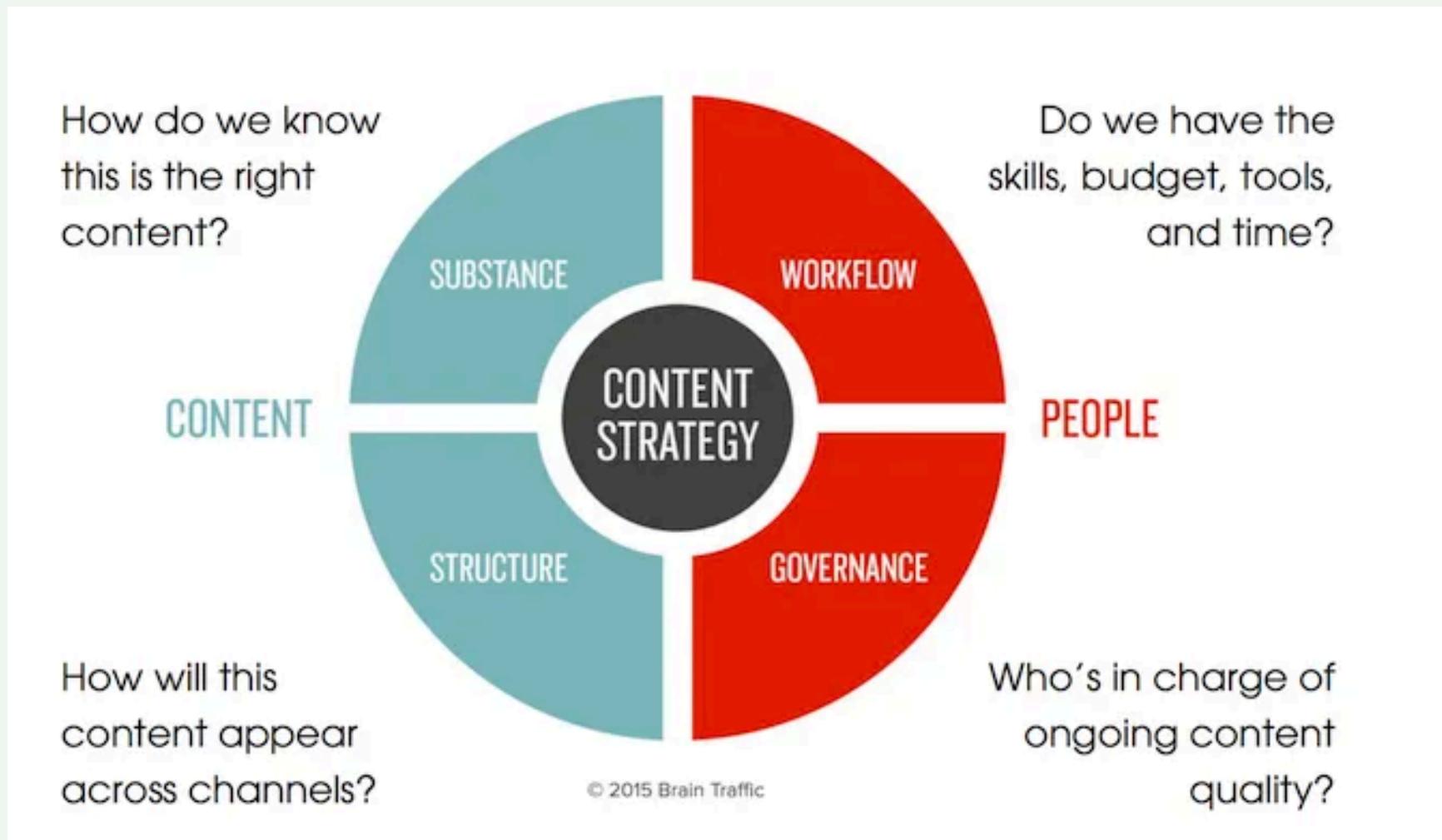
We can take	We cannot take
• Vendor or contractor payments	• Federal tax refunds
• Expense reimbursements	• Social Security income
• Travel advances	• Veterans benefits
• Certain types of grants	• Railroad retirement benefits

What happens next?
If you still owe this state debt in 60 days, we will notify the federal government. They will send us your federal payments until this debt is paid in full.

Note: If you have evidence this debt is not past due or not legally collectible, you may request a

What topics should a content strategy cover?

How do we know this is the right content?

Do we have the skills, budget, tools, and time?

SUBSTANCE

WORKFLOW

CONTENT

CONTENT STRATEGY

PEOPLE

STRUCTURE

GOVERNANCE

How will this content appear across channels?

Who's in charge of ongoing content quality?

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From Kristina Halvorson's company, https://www.braintraffic.com

How do we get to a content strategy?

Discover

Plan

Align

Use

Govern

Discover the situation before you plan

Discover
Plan
Align
Use
Govern

Before you have a strategy, you must know what you are trying to achieve.

Aligning content with the organization's goals while meeting users' needs

What's the purpose of your organization? (vision, mission, goals)

Whom are you trying to reach with your content? (personas)

What problem are you trying to solve?

Content Strategy

Organization's goals + users' needs

DEPARTMENT OF REVENUE

Our Mission
Working together to fund Minnesota's future.
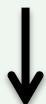
Our Vision
Everyone reports, pays, and receives the right amount: no more, no less.

Organization's mission and goals

↓

Strategy

↓

Tactics

+
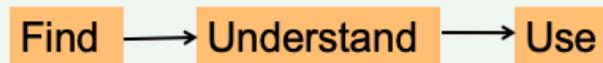
You succeed **only** when the people who need your content succeed.

Find → Understand → Use

Another example: www.ready.gov

**Mission
and goal**

Ready is a National public service campaign designed to educate and empower
the American people to prepare for, respond to and mitigate emergencies, including natural and man-made disasters.

The goal of the campaign is to promote preparedness through public involvement.

Learn COVID-19 Facts

https://www.ready.gov

Cybersecurity

Learn how to prevent, detect and respond to cyber incidents.
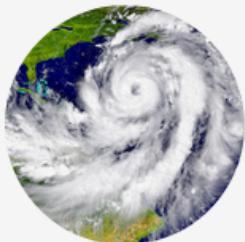
Get Cybersecurity Tips

Pandemic

Know the facts about a pandemic. Public Health is everyone's responsibility.

Learn How to Stay Safe

Hurricanes

Prepare for hurricanes now. Know where to go if asked to evacuate quickly and how you and your family will get there.

Get More Hurricane Tips

Prepare for Earthquakes

The Great Shakeout is at 10:15 a.m. on Thursday, October 15. Learn what you can do to get prepared for earthquakes ahead of the drill.

Get Earthquake Tips

Wildfires

If there is a wildfire in the area, be ready to evacuate on short notice.

Get Wildfire Tips

Flooding

If you approach a flooded road or walkway, follow this rule: turn around, don't drown!

Prepare for Flooding Now

© 20

How do we connect the organization and users?

The content of _____

[our website, letters, whatever we are developing a strategy for]

will be successful if

[these people] _____

[do this] _____.

Be as specific as you can when naming "these people."
. . . taxpayers, people who concerned about an emergency situation, cancer patients and their families, agency staff, . . .

How do we keep our users in our minds?

Personas!

One of the personas for King County, Washington
Courtesy of King County and Anthro-Tech

Free "persona" pictures: https://thispersondoesnotexist.com
Save the faces that work for your personas.

Plan for all the elements of a content strategy

Discover
Plan
Align
Use
Govern

Processes
- How will you solve the problem you discovered?
- How will you get content efficiently and effectively through its life cycle?
- Who will review? When? How?

People
- Writers: Who? How many? Training needs? etc.
- Editors: Who? How many? Training needs? etc.
- Designers? Producers? Others?

Policies
- Content types and messages
- Style guide – emphasizing plain language guidelines
- Voice and tone guide – may vary by audience and medium

Pay – Budget!

Priorities – What to tackle first
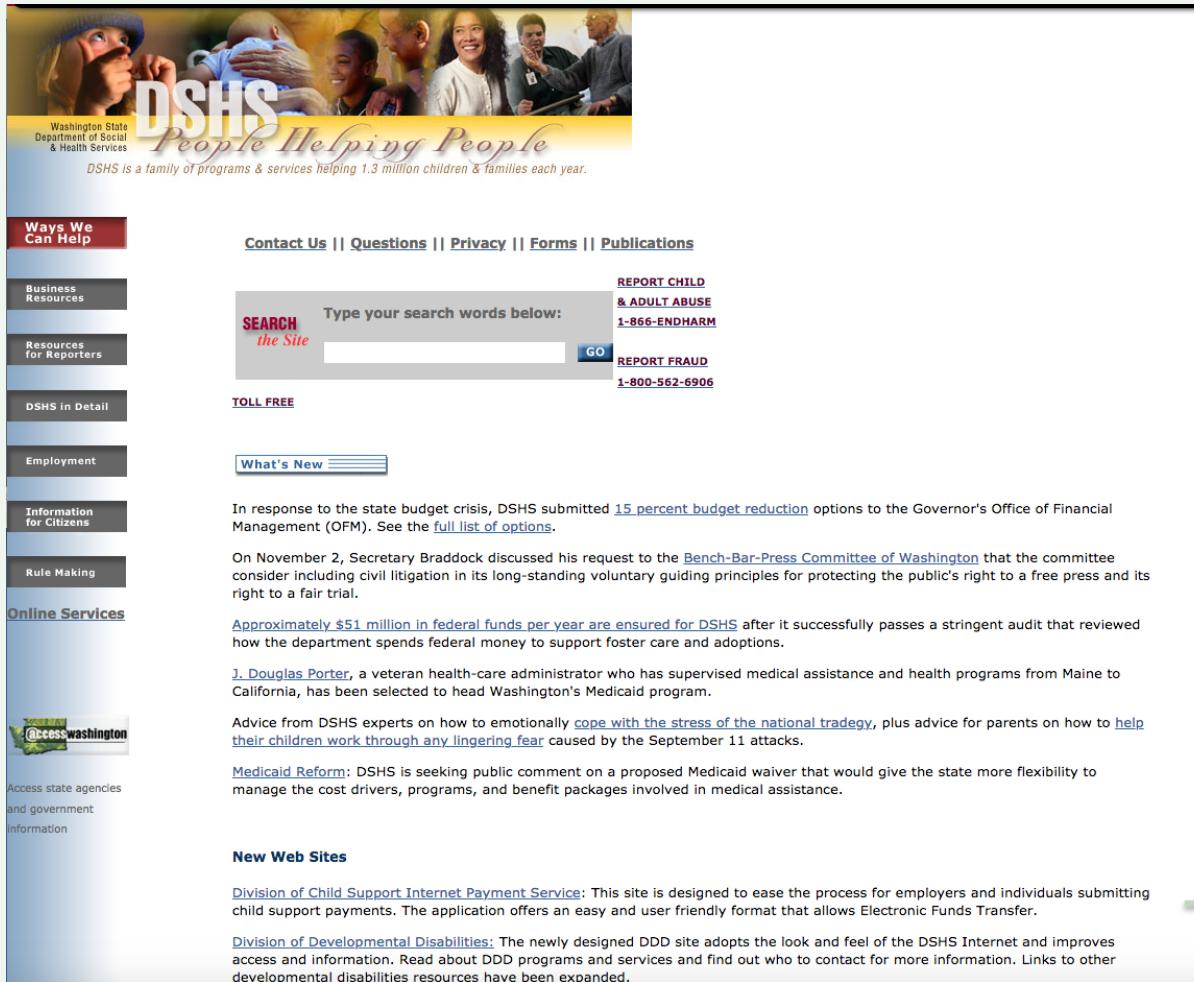
Collaborate to get to your content strategy

- Form a cross-functional team
  (related to the problem and the scope)

- Together, go through Discovery, Planning, Aligning
  (The team may need facilitation and training to do this.)

- Convince people the problem is real
  - Get relevant data:
    web analytics, error rates on forms, phone calls, . . .
  - Do a usability test of the current content:
    website, letters, forms, fact sheets

Training helped WA DSHS remove silos – 1
Washington State Department of Social and Health Services

Before content strategy

News

Different offices' websites

Training helped WA DSHS remove silos – 2

After training with reps from every division

Bill Cogswell of WA DSHS
with Suzanne Boyd & Emma Rose from [Anthro-Tech](#), and Ginny Redish

Training helped WA DSHS remove silos – 3

Today

Align your strategy with others

Discover
Plan
Align
Use
Govern

Make sure your plan fits with

- what you learned in Discovery
- other strategies in the organization

Coordinate strategies to serve your users

Make sure you
- share the same vision and mission
- have compatible goals
- understand the same personas – their goals, needs, journeys, scenarios

Work with other strategists to
- help people know about the content
- get people to the content
- find out how usable the current content is
- plan to find out how usable new content is
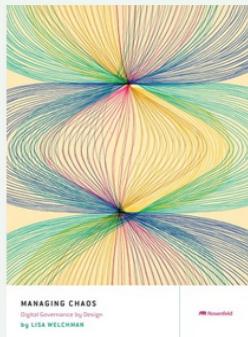
Use your strategy to improve your content

Discover
Plan
Align
Use
Govern

- Inventory the content

- Audit the content

- Hire and train writers, editors

- Set and follow an editorial calendar

- Write, edit, design, publish

Govern the content moving forward

Discover
Plan
Align
Use
Govern

Who is in charge?

Who decides when issues arise?

How will you keep the content current?

- Every topic or page or document must have an owner and a schedule for when it is looked at again

How will you keep the strategy current?

See also:
https://www.usability.gov/what-and-why/content-strategy.html

Managing Chaos
Welchman, 2015

An example of strategy driving tactics: gov.UK

Problems: Too many websites with too many pages.

               People need several sites to complete one task.

Scope: All UK government websites

Discovery: Websites with content not relevant to government

Strategy decision: "Government should only do what only government can do." We publish content only if users need it.

               (email from Sarah Richards to Ginny Redish, 11/4/19)

Success: 116,000 pages deleted

               https://www.slideshare.net/SarahRichards2/confab-us (Slide 27)

Using the strategy – tips on tactics

- Inventory the content

- Audit the content

- Hire and train writers, editors

- Set and follow an editorial calendar

- Write, edit, design, publish

Inventory the content

|	A	B
1		
2		

A1
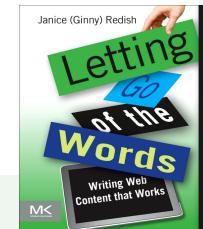
1. Inventory the current content

You have to know what's there to know what to do with it.

One useful way to keep track of and show the inventory is a spreadsheet with columns like these:
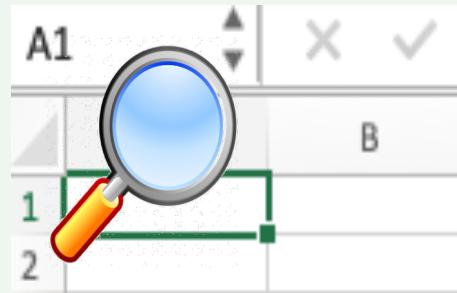
Columns to use for inventory

- URL
- page title
- short description
- URLs that link to this page
- URLs of links from this page
- date created (if known)
- date last updated (if known)
- current owner (person or part of the organization)

or similar columns
for letters, notices, or whatever
you are inventorying

Janice (Ginny) Redish

Letting
Go
of the
Words

Writing Web
Content that Works

Second Edition

MK
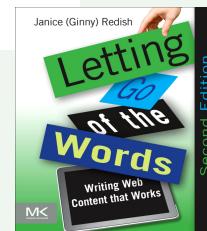
page 42

Audit the content

Columns to use for auditing

- fate (delete, move, combine, separate, edit)

- importance (high, middle, low – to set priorities for dealing with its fate)

- comments related to fate and importance

- person responsible for making changes

- (possibly more columns related to "who" for owner, writer, editor)

- due date for changes

- status (not started, in process, in review, published – or whatever stages you have set for the writing / editing / reviewing / publishing process)

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Tip 1 for auditing – usability testing

Include usability testing in your content strategy.

Photos from iStock.com, licensed to Ginny Redish

If you did not do usability testing of the current content in the Discovery phase, do it when you audit the content.

Caroline Jarrett and Ginny Redish,
How to test the usability of documents (3 techniques)
UXmatters, May 4, 2020
https://www.uxmatters.com/mt/archives/2020/05/how-to-test-the-usability-of-documents.php

Tip 2 for auditing – purpose, persona, conversation

Use this 4-step process:

1. Answer: What's the purpose of this content?

2. Answer: Who is the persona for this content?

3. Walk the persona through the conversation
   that the persona wants to have on the topic of this content

4. Use the purpose, persona, and conversation
   to analyze the content and decide what to do with it

Step 1: What's the purpose?

What do you want people to do after reading or using this content?

My communication will be successful if
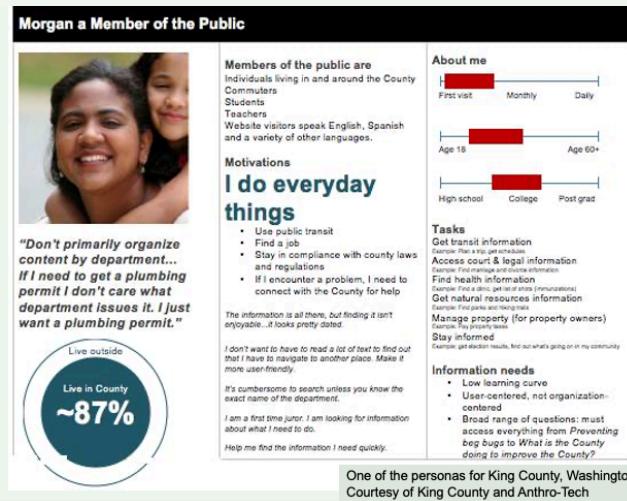
[these people] _____

[do this] _____.

Only keep content that serves important purposes for the organization and the user.

Step 2: Who is the content for?

Have a relevant persona?
Great. Take that one to the next step.

One of the personas for King County, Washington
Courtesy of King County and Anthro-Tech

Don't have a relevant persona?
Create an "assumptive" one
with the format on the next slide.

Creating an assumptive persona

[Name] _____

Job or position, representing what group

_____

[Name] is coming to this content now because [persona's purpose, problem, or questions] _____

_____

When [Name] comes to this content, they are [adjectives or phrases, such as busy, frustrated, tired, . . .] _____

In relation to this topic, [Name] knows [how much about the topic, specific words] and doesn't know [specific words] _____

_____

We must also remember that [Name] is [anything else that is relevant like using a mobile, reading in a second language, . . .] _____

_____

Step 3: Walk your persona through the conversation

Be the persona.

Talk through your experience and reactions – as the persona.

- What is your day like today?

- How did you get (or get to) this content?

- Do you read it right away? (If not, what do you do with it?)

- Do you read all of it?

- What part of it do you go to first?

- How do you react to it?

- Does it answer your questions?

- Are any sentences or words unclear to you?

- What are you going to do now?

Step 4. Use the purpose, persona, and conversation to analyze the content

- How well does the current version meet the organization's goals and the user's needs? (How well does it serve your content strategy?)

- Should you keep it, remove it, change it?

- How should you change it? What would make it better?
  - Different content?
  - Better title?
  - Different organization?
  - More headings? Different headings?
  - Better writing? Shorter pieces? Less jargon?
 - Different layout?

Thank you

Your turn:

Question?
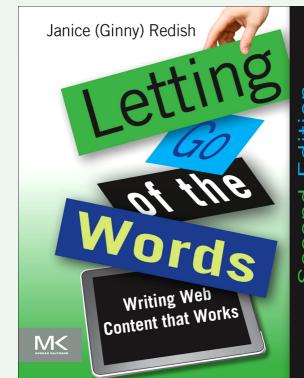
Comment?

Favorite example – good or poor?

Write to me:
ginny@redish.net or
ginny.redish@gmail.com

2nd edition
Elsevier, 2012