Content and IA for a CLIENT WEBSITE
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Pre-Kickoff Content Call (~60 mins)

Before the kickoff meeting, get on the phone with key stakeholders for 60-90 minutes and ask them pertinent questions about their users. Record everything they say.

The goal of this call is to start understanding their primary and secondary audiences on a detailed level.

Questions to ask stakeholders on this pre-kickoff content call:

1. What are the categories of users who come to your site?
2. Which of these categories supports your business the most? (i.e. primary user(s))
3. What prompts them to come to your site?
4. **What are the common questions this primary user asks you?**
    a. **How do you answer these questions?**
5. **What are the common complaints this primary user asks you?**
    a. **How do you address their complaints?**
6. What are the end-goals of this primary user/where do you point them when they're done

learning/asking questions/complaining?

Repeat questions 3-6 for the other primary audiences.

Primary Audiences

Try to limit the primary audiences to 2.

1. Category/Audience Type

- General Notes
- This audience comes to the site when...
- This audience asks questions like...
- This audience complains about...
- With our help, this audience ultimately wants to... (conversion points)

Secondary Audiences

All others are secondary and tertiary; go through these if time, but focus on the primary audiences otherwise.

2. Category/Audience Type

- General Notes
- This audience comes to the site when...
- This audience asks questions like...
- This audience complains about...
- With our help, this audience ultimately wants to... (conversion points)

Suggested Areas of Content Improvements

During the pre-kickoff content call, the client will have suggestions on ways they want their content to improve. Jot those suggestions down here.

Kickoff Meeting Content Roundtable (~90 mins)

The goal of this roundtable is to give everyone a chance to contribute to the conversation they're having with users, and to plant the seed that content creation will be collaborative and driven by the users' questions, complaints, and goals.

For 30 minutes, review the audience notes/takeaways from the pre-kickoff content call with the entire group. Ask for additions or comments.

For the next 30 minutes, encourage everyone to add their thoughts on how a typical conversation begins, grows, and ends when speaking with the primary audience type.

This enables every person to contribute his/her thoughts in a factual manner; each person has an email or voicemail waiting to be returned to audiences of his/her group (e.g., marketing, communications, fundraising, technology, etc.)

If time allows, go through this activity for more than one type of conversation or audience type.

Take notes in bullet form so everyone can see that you're recording his/her feedback.

Questions

- Common question we receive from type of user
    - What the answer is
    - Where the user can find the answer OR what the user can do about it
- Common question we receive from type of user
    - What the answer is
    - Where the user can find the answer OR what the user can do about it

Complaints

- Common complaints we receive from type of user
    - What the resolution is
    - Where the user can find the answer OR what the user can do about it
- Common complaints we receive from type of user
    - What the resolution is
    - Where the user can find the answer OR what the user can do about it

Early Conversation Map

For the final 30 minutes, do a collaborative conversation map that translates the emerging themes of the content roundtable to **a VERY high-level homepage structure**.

This structure is not content; however, it references the kind of conversation flow that is emerging from the pre-kickoff call and kickoff roundtable. The structure should be prioritized to include the most vital information (to start a conversation with a primary user) at the top, content of less importance below.

As an example:

1. User-oriented intro statement: “Fund a water project in Africa. >>”
2. Outcome of existing project: “More than 3,500 people are drinking clean water today in Ghana. Full story >>”
3. Partnership information: “Thanks to partners like Google and Intuit, we’re digging 20 new wells this month. See what it takes to become a corporate partner >>”
4. How it works: “Our on-site teams work 7 days a week. Here’s the typical timeline for bringing a well to a remote village. >>”

This early conversation map for the homepage shows everyone how the user-oriented discussion can form the basic conversation, which forms the content, which then dictates structure. (NOT the other way around.)

I then share all of these notes with the client contact(s). From now on, s/he is in it with me, collaboratively writing content and continually taking the reins from me as the structure emerges and the conversations become clearer.

Current Usage & Audience Data

From the kick-off meeting, content calls, and analytics, capture language used by stakeholders about the terminology they use in describing their business. Also the terminology they think their users often use.

Then, validate or invalidate these important terms (the ones directly related to being able to find content on the site) using Google Analytics (primarily site search and Top Content) and Google

Keyword Tool (to discover the popularity of terminology within organic search/beyond the site).

This will help to tailor language to both what is internally accepted by stakeholders, for the audiences who are qualified/using the site, and for potential audiences who are searching for products/services your client has to offer (but using a different lingo).

It will also help to determine which “conversations” to start with.

Google Analytics Top Content

Which pages comprise more than 50% of all traffic over the past 6 months (assuming this is a list of <20 pages, as most are)

1. Page Name (Percent Visit) -- Notes about bounce rate, time on page, or anything else noteworthy
2. Page Name (Percent Visit) -- Notes about bounce rate, time on page, or anything else noteworthy

Google Keyword Tool

[https://adwords.**google**.com/o/**KeywordTool**](https://adwords.google.com/o/KeywordTool)

I normally document a bunch of the client’s “jargon” and then use the Google Keyword Tool to find out which terms are shared by users. Even though these aren’t “qualified” users in that they haven’t been on the client’s website, they *do* help me understand the spectrum of words that are related to the client’s jargon.

For example, nearly 5 times as many people search Google for “obamacare” over “healthcare reform.” That’s not to say I could get the client to use “obamacare” from now on, but it helps me educate the client on the realm of possibility by popularity (or lack thereof).

Post-Kickoff Analytics Call

A week after the kickoff, I normally present the findings of my analytics research to the client. The goal is to MUTUALLY decide which conversation to start writing first.

That determination is fueled by (a) the primary audience and (b) the analytics to support where that audience’s MOST VALUABLE CONVERSATION is already happening.

It might be a combination of existing content from the current site; it might be a rethinking of a single page of content. But the process centers around writing a realistic conversation to have with the primary user REGARDLESS of “page” or structure.

New Content

This section will include content you and the client contact(s) are writing together, commenting on together, and revising together.

This content will inform the prototype and design phases; it will be used to determine how we should structure the UI, IA, UX, and CMS to create intuitive flows and a more extensible system.

Although the content here is “complete,” it’s primarily to inform conversations and ongoing design work -- it’s NOT for stakeholder review and approval.

Content creation process should be repeatable and balance SEO, UX research, marketing, and sales:

1. User prioritization: Based on "what I’m looking for” and its value to CLIENT (above)
2. User terminology & data: Google keyword research + analytics (above)
3. Content marketing: Messaging and IA to support 1-2 (this Google document)

Notes for CLIENT contact(s) who’ll be writing content with you:

- Focus on writing actual content for the most sought-after content FIRST.
    - This is according to analytics under Top Content
    - Consider also what stakeholders deem most important for target audiences
- Ignore structure and flow -- focus entirely on:
    - What is a realistic conversation we have with users on specific topics?
    - How can we clearly anticipate or answer their questions?
    - What’s the end-result of that conversation -- a sign-up? A referral?
- Create content that describes a realistic conversation you have with the target audience.
    - That conversation probably exists on a page, so once you have the content written and label the page (e.g., “this is the kind of content we’d expect for a case study page”) using a Heading.
    - Once you’re done with each conversation/page, then create a table of contents based on those headings and VOILA, you’ve got a sitemap.

The First Page

Don’t be scared! Without a structure, it may feel funky at first. But you write content all the time without structure -- that’s what email is! Once you start writing, a natural structure will emerge. Just work to keep it succinct and representative of a real conversation your primary user wants to have about whatever topic (page) you’re writing for.

This is much easier if you choose a page that is NOT too high-level -- no homepages or “About Us” pages. Instead, do something more specific and topic-focused, often the most popular “deep” page from analytics. There, you have plenty of substance to work with, questions to answer, and potential conversion points (e.g., “sign up for a newsletter on this topic.”)

To get started, I get in the mind of the primary user as I’ve come to know him/her through the stakeholder call, kickoff roundtable, analytics research, and Google Keyword search results.

To represent the client’s side of the conversation, I normally use an existing page on the client’s website, or pull from emails or newsletters they’re particularly proud of. Sometimes an end-user will have written a blog post or a testimonial that can form the beginning of the page content.

Once I write a draft and believe the page has fully answered the target audience’s questions and given them a “next step/end point,” then I share the draft with the client.

Normally this is a 1-2 weeks after the kickoff.

The Second Page and Beyond

When you review the first page with the client, ferret out their thoughts on actionable content/user elements like:

1. How well does this represent a realistic conversation with the target user?
2. What gaps exist in this content that we need to address?
3. How would the conversation get to this point?
4. Where would the conversation go from here?
5. Are there any parts that won’t work for your stakeholders/brand?
6. Are there any parts that won’t work for your resources/content managers?

Questions #3 and 4 are specifically oriented to helping you decide “what next.” Decide which conversation to write next based on the client’s answer to 3 or 4.
At the same time, I ask the client to try writing a sister conversation to the one I’ve already drafted/we’ve reviewed. Normally this works because we’ve chosen a deeper, content-heavy

page (think a case study, a services description, or a product description page).

We each go away with our homework -- me drafting a new conversation and the client drafting a conversation that follows a similar pattern to the page we just reviewed together.

This pattern continues -- writing conversations, reviewing them collaboratively, deciding which next conversations to do based on a realistic flow -- for several weeks after the kick-off meeting until there is enough content to represent an end-to-end conversation.

Then, because this is typically 4-8 pages of content, the designer is able to create prototypes or comps around the content. While the design phase in ongoing, we continue writing content -- someone drafting or writing, the other person doing the same -- until a sufficient # of pages are written to represent many different types of conversations that could happen with the users.

Labeling each new conversation with an appropriate page name, and making sure it's in a header, then your sitemap is beginning to form. Just create a table of contents using those headings to see the information architecture taking shape. Bada boom!

Once a load of content is written and the structure for a bunch of pages is created, then we start moving into more traditional content-strategy deliverables (defining content types from what we've written; defining a tag structure to relate conversations to one another where contextually relevant; structuring a CMS or using something like GatherContent for direct content entry.)