Project Discovery

Methods in Content Strategy

A Clearwired White Paper

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Purpose

The purpose of this paper is to describe the process and benefits of using a content strategy session in web site development in order to quantify web site content and to begin the information architecture process in a user-oriented methodology. This practice builds on the work of Alan Cooper and uses terminology incorporated into a framework by Jesse James Garrett. This article serves as a primer and practical approach to using the content strategy session to effectively map the business goals of the client with the content needs of the web site users.

Introduction

Prior to the discussion of technical specifications, ROI, and cost-benefits analysis, the content strategy session establishes the needs and goals of the site from the end-user perspective. It serves as an important first step in a web development methodology that establishes a foundation for all subsequent discovery work early in the web development process. The content strategy session is a 4-6 hour in-person meeting with the web development team and all project stakeholders. In larger organizations, a content development team may be present to address content needs raised during the content strategy session. The facilitator of the meeting will be the lead architect of the project, the senior producer, or the project manager depending on the organization.

The content strategy session is a free environment for all project stakeholders to brainstorm ideas for the site, including new functionality and content, deletion of existing functionality (in a redesign), or repurposing of content from other mediums (print) . The goal is to hear from all stakeholders and bring all ideas to the table for a clear, open discussion.

The session facilitator will drive the meeting in a planned, deliberate flow, and through an open conversation, eliminate extraneous functionality and content. The pattern for the content strategy session entails a discussion of business goals, users, content, content mappings, and finally the creation of personas. If the project is a redesign of an existing site, the session can begin with a deconstruction of the existing site to determine if all business and user goals are being met. In a new implementation or redesign, the process is the same.

The role of the facilitator is to lead the meeting and to interview the stakeholders as she walks them through the process. An assistant to the facilitator should be present to take notes in order to deliver an after session conference report. The session is best conducted in a large meeting area or conference room with access to a whiteboard. In each successive stage through the process, the facilitator, stakeholders, and content developers will begin to see with perspicuity an outline of the site. This outline will be created by the facilitator using large Post-it notes with the name of the goal, user, and content title written on them arranged in a hierarchical structure on the whiteboard.

Step 1: Business Goals: Determining the Message

Most clients will be happy to discuss the business goals and impetus for a site redesign or new site initiative within the organization. It is important to open the floor to all stakeholders and elicit the broad range of reasons why everyone is there, and define the reasons for the initiation of project. Try first to detail the needs of the client's particular industry. Are they selling a product, a service, are they distributing content, are they a member organization that depends on user accounts or user participation? Try to define the top business goals of the organization. Using the Post-It notes, arrange these goals vertically down the left side of the whiteboard.

It is important that the facilitator maintain control of the conversation. If someone from the membership department raises a concern about efficiencies in the registration process and wishes to openly discuss the problem the membership directory, it is the facilitator's job to get to the root of the issue without bogging the meeting down in minutiae.

After explaining the purpose and rules of the session and the client discovers that this is a forum to express their true feelings about how the site should benefit the business, you may find that the conversation turns into a gripe session and you may be store for some low-level infighting. Keep the train on the tracks. Gently remind the team the purpose of the session and bring everyone back to business goals and root issues. If the root issue isn't apparent when discussing existing content or functionality in a redesign, continue back in time until you hear the reason the decision was made during the last implementation.

After you have identified the top goals, ask the stakeholders to order them by importance and eliminate any redundant goals. After you reorder your Post-It notes, you now have a list of business goals that you will carry into the next step when you begin discussing site users.

Step 2: Exploring Site Users

The next step is to direct the conversation toward the existing user base. It is helpful to have read the existing web statistics before conducting this portion of the session. You're looking for hard numbers.

If the site is a registration based system, how many new users subscribed in the past six months? If the site is selling a product, what are the sales metrics? Are customers e-mailing your client with questions, are they signing up to receive e-mail newsletters? Are there sections of the site that are wildly popular, some sections that are receiving no traffic whatsoever? Ask the stakeholders to name these user groups, and then write them on the Post It notes and place them to the right of the business goals on the whiteboard. Again, eliminate redundant user groups and order them by priority on the whiteboard.

You may find in this portion of the session that there are an entire host of users with different needs, this is perfectly normal. It is important to write down all of the individual users that the client suggests. As you work through the process, you'll combine or eliminate some user groups by content needs and pare the list down further with the creation of personas.

Step 3: Content Inventory

If the project is a site redesign, the current site serves as the starting point for this part of the exercise. Make sure that you have an outline of the current site with you and transfer this hierarchy onto Post-it notes on the whiteboard. Create a site map using the Post-It notes with major sections horizontally across the whiteboard and sub sections vertically arranged. If the site is deep, it isn't important to map the entire site. The goal is to note all salient sections of the site keeping in mind the user groups that access this content.

If this is a new site, the goal is to get a broad overview of the content that will serve as a starting point for the information architect as she maps the site and creates a detailed site map.

If the project is a new site, bring the stakeholders and content developers into the conversation and begin brainstorming content based on business goals. It will be the decision of the lead architect and stakeholders to determine what is feasible or out of budget when the structure and information is packaged and presented back to the client. Blue-sky ideas are perfectly acceptable here. The results of the session will ultimately determine what works based on the business goals and the content that you've so neatly posted to the whiteboard with the content mapping, site map and personas all falling in line with the results of the content strategy session.

Step 4: Content Mapping

It is now time to map the business goals, the users, and the content. There are many ways that this can be accomplished in the session. It is important that you, as the facilitator, have begun thinking of a cohesive structure while you've been leading the team through the previous exercises. It is very easy to lose track during this step and muddle the conversation, confusing the process and the steps that you've taken to reach this point. In order to leave the client with a lucid understanding of the process that the project will take from inception to deployment, it is important to tie up loose ends and reach consensus on user groups and content. It is not necessary to finalize the site architecture at this point. The deliverables of the content strategy session is the site map. All data that you gather during the session is reduced to a site architecture which the client approves or revises.

Avoid confusing too many users and too much content, or content that overlaps and applies to multiple user groups. A common scenario at this stage could be a news section of a site. The news pertains to all site users, not any one group in particular. It isn't necessary to spend time trying to map this type of content to a user group. This is the easiest way to confuse the stakeholders and to confuse you. Instead, begin to consolidate content that is unique to a user group, this may be users purchasing the flagship product, your goal is to match content with user groups and in turn align them with business goals. In practice is helps to consolidate some users into a general, or all groups category. At this point, the stakeholders, content developers, and project team is able to see all content on the whiteboard. Now is the time to return to the most important business goal and the most important user. The information architect will be creating a site map that is tailored to this distinct user.

Step 5: User Groups to Personas

The final step of this user oriented discovery process is the creation of personas. The task of the facilitator is to identify two to three users of the site and to give them a personality. An image of the person should be chosen from stock photography, the person should have a biography and a history of their technology interaction written for them in the effort to establish their credibility. This will in turn lead the conversation to these users when making decisions with the stakeholders and the design and development team. In Cooper's goal-directed methodology, this is the user that will become the audience for all functional specifications, interaction design and content as the site evolves. The establishment of personas gives a human face and personality to a "user" that has heretofore been anonymous and unknown. Now that you've discovered business goals, mapped content to users and established the personas that will drive the design and development process, time to get back to the office and write up your conference report! Oh. Don't forget to take a few snapshots of the whiteboard with your digital camera before you leave the conference room. These photos will save you when everyone gets a bit fuzzy about the results of the meeting.

Conclusion

The process of establishing personas in order to direct the design and development process establishes a clear user that the design team and programmers can keep in mind when making decisions as the site moves from user interface diagrams to color comps and finally to HTML and programming integration. The content strategy session is a great exercise that allows the stakeholders and development team to reach the same conclusions in an open, conversational atmosphere. In my experience it is the best method to ensure that all members of the team are on the same page as the project moves forward.

Materials

Whiteboard
Post-it Notes
Markers
Digital Camera

Content Strategy Deliverables

Content Strategy Map
Site Map or Outline
Personas
Content Inventory