CONTENT STRATEGY

FOR THE WEB

SECOND EDITION

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BECAUSE CONTENT TOUCHES just about every area of an organization, strategies only work when everyone is aligned and on the same page.

Alignment starts in the discovery process and continues, well, forever. At the beginning of the content strategy process, alignment is about providing your stakeholders with baseline information about the content, each other, and the strategy process. Then, for the rest of time, it means keeping people up to date, asking for input, and responding to questions. (Yes. Seriously. Forever.)

C'MON, PEOPLE NOW

Alignment isn't necessarily about creating consensus. It's about creating a common understanding. But how on earth are you supposed to accomplish that? In this chapter, you'll learn how to:

- Identify your stakeholders.
- Convince them to participate.
- Set the stage for alignment with a kickoff.
- Get them engaged.
- Keep them motivated throughout the project.

WHY IS ALIGNMENT SO IMPORTANT?

We've found that we can often predict how successful a content strategy will be within the first few weeks. How? We look at how receptive the project sponsors are to collaborating with others. It's our experience that people who are open to input and opinions succeed far more often than those who try to keep their projects under wraps.

Content strategy requires outreach and alignment. Why? Two reasons.

Lots of people affect your content

People throughout your organization are involved in content processes. The marketing and branding teams might be obvious players, but legal reviewers, subject matter experts, technologists, and many others have roles to play. Acknowledging and understanding their ideas, issues, and opinions will help you create a more informed, effective strategy.

Your content strategy affects lots of people

When you introduce a new content strategy, you're asking all of those people to change their habits, opinions, and accountabilities. That's a tall order. You'll need more than a fancy PowerPoint™ presentation to change people's behavior—you'll need their trust.

You'll need to help them understand the big picture. Ask for input and respond to questions. Show them where they can contribute and how they will benefit. The earlier you start, the better. So, hey, let's get started!

FIRST, IDENTIFY YOUR STAKEHOLDERS

When we talk about "stakeholders," we simply mean "people who matter to your project." Stakeholders can make or break your strategy project—so it's important to think carefully about who is necessary to the health of your content.

TYPES OF STAKEHOLDERS

When people think about picking stakeholders, they often try to get representatives from each of the departments in the organization. That's a good way to start. Having the right departmental representation is important.

However, as you create your list, you may want to think about functional categories, as well:

- **Strategic decision makers** are people who will be most impacted by your strategy and, therefore, deserve to have a significant amount of impact and input during the process.
- **Money people** are the folks that are funding your project. Maybe it's your boss, and your boss's boss. They are likely the ultimate decision makers on everything you do.
- **Champions** are people who will advocate for your project regardless of their relationship to the content. They see the value of content strategy and go out of their way to get others interested and invested.
- **Showstoppers** are individuals who have no "official" power, but could stop the project in its tracks (the CEO's henchman, for example). This category includes people who are politically necessary. You have to invite them, because they'll turn into showstoppers if they're not involved.
- **Interested others** are people who have tangential interests in your project. Maybe they have a very limited or indirect relationship to the content. Or, maybe they're considering a similar project of their own.

Considering these categories will make it easier for you to decide who needs to be involved, when, and in what capacity. Do they need to come to every meeting or just the big ones? Do you need to interview someone personally, or can you just send him a questionnaire?

Categories like this are certainly not a caste system. People can move from one to another, and sometimes be in two categories at once. **But, identifying your stakeholders by how they impact the project and not by their areas of expertise will help you understand how to involve them going forward.**

YOUR DAY-TO-DAY PLAYERS

The people in the "strategic decision maker" category often make up your core team. They come to all the meetings. They come up with the lion's share of ideas. And, they are the most important people to keep aligned. (The money people can be part of the core team, too, depending on their accessibility and interest.)

Of course, it's important to limit the core team to a reasonable size. What that size is depends on your situation. But, if you have a "core team" of 25 people, it'll be hard to get anything done. If you've got a big number of strategic decision makers, you'll have to decide who is most critical to have on the core team and who has the time to participate. Or, you can create several task forces that can work on different aspects of the project simultaneously.

Just be sure no one is excluded from the process altogether. Even the "interested others" should still be respectfully involved—whether you invite them to the biggest meetings or simply send them a quarterly email update.

NO ELITISM, PLEASE

It's tempting to just invite managers to represent their teams. But, in reality, the managers don't always know how things work in the content trenches. Be sure to include people who really know what's up, even if they're interns. A combination of people from all levels of the organizational hierarchy works best.

THEN, GET THEM INTERESTED

People are busy. They might not want to add anything else to their already triple-booked schedule. If you have key stakeholders you want to support or participate in your content initiatives, you may have to work at it.

You need to tell a compelling story (you're a content-savvy person, after all). Create a nice story arc, and present your case with the following elements:

- **The problem or opportunity:** What's going on with content—complete with some persuasive facts from the research or some particularly convincing examples on how content affects the stakeholder's bottom line or area of responsibility.
- **The urgency:** Why it's urgent to work on the content problem *right now*. (Competitive advantage? User needs? Business opportunity?)
- **The request for help:** Why you think they would be an asset to the team; what unique views they can provide. Make sure you tell them how much you respect their time, and outline your expectations for participation.
- **The players:** A description of who is participating (direct them to some of your project champions, if you've identified them already).
- **The payoff:** The benefits to them and the organization as a whole.

Most people like to be helpful and will agree to participate at some level. If someone important turns you down, respectfully ask them why. Resistance is often about lack of clarity, so you may be able to change their minds if you clear things up. If they still say "no," ask if they'd like occasional updates about content projects. Keeping them involved at any level is a win for you, if only a small one.

KICK OFF ON THE RIGHT FOOT

Usually, there is a formal kickoff meeting at the beginning of any content strategy project. This is where all the agreed-upon stakeholders come together for the first time. We often wait to host that bonanza until we have some research and analysis (see *Chapter 5, Audit*, and *Chapter 6, Analysis*) under our belts. That way, we can use early findings to put the project in context *and* ask the stakeholder group to fill in any analysis gaps. So, from the beginning, people are learning and contributing—getting the information exchange off to a good start.

As you're working toward early alignment, here's what should happen in the kickoff meeting.

EXPLAIN WHY YOU'RE THERE AND WHAT YOU'VE DONE SO FAR

If you want to get people on board, you need to be sure they feel included in the conversation. Using lots of industry lingo and failing to tell them what to expect will burn you every time. You'll need to:

- Explain what content strategy is
- Reiterate how content strategy will benefit the organization and the stakeholders

And, if you've already completed any audit or analysis work, you can discuss:

- What content exists today and what shape it's in (your audit findings)
- What the internal and external factors are that impact your content—highlighting user research, competitive research, and the content workflow process

HELP EVERYONE GET TO KNOW EACH OTHER AND THEIR ROLES

Probably the most important part of alignment in the discovery phase is to help stakeholders learn about each other. In large organizations, it's not uncommon for people to meet each other for the first time on a content project. Even in small companies, people may see each other in a new light. Helping people understand and engage with one another is a huge part of the job.

SET CLEAR EXPECTATIONS FOR WHAT COMES NEXT (AND FOR WHOM)

Lastly, you need to set the stage for the rest of the work. People will want to know:

- What is their role in the process?
- How much and how often will you need them to participate?
- What kinds of things will they be doing?
- Who are the decision makers and what is the decision making process?
- What are the immediate next steps?

The more they know, the more they'll feel some ownership in your content projects from day one. Remember, your stakeholders are your allies—or, if they're not initially, it's your job to find that common ground. You want them to trust you so they'll share the stuff that matters.

ENGAGEMENT DOESN'T STOP AFTER THE KICKOFF

At the beginning of a project, alignment is a major focus. But, it's important to make sure you keep the momentum going. How and when you solicit stakeholder input during the remainder of the project is unique to your situation. But no matter what happens:

- **Communicate and encourage participation:** Schedule regular meetings, host workshops, send regular updates, have Q&A sessions, etc. Be consistent as clockwork—it's another way to inspire trust.
- **Listen and respond:** Always take the stakeholders seriously. Respond to their ideas and insights in a respectful, timely way.
- **Distribute documentation:** Make sure people always have documentation in hand—so they can follow along in meetings and have reference materials whenever they want to refresh their memories.
- **Celebrate milestones:** Highlight milestones and other progress. Be sure everyone knows how he or she contributed in positive ways.
- **Set expectations:** Make sure people always know where they stand. What is their role in the project? What do they have to do next?

Alignment is a never-ending, but highly rewarding, process. Just think of the smart people in your stakeholder group. When you harness all that brainpower, you're bound to meet—and exceed—your business and user goals.

GO, TEAM, GO

Alignment is a huge first step as you head into your discovery phase. Once you've rallied the players, you're ready to tackle your content together.

In the next two chapters, we'll dig deep into your content (audits) and examine the world in which it lives (analysis).

Are we aligned on this plan? Terrific. Onward.