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**Erin Kissane**

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# THE ELEMENTS OF CONTENT STRATEGY

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## Foreword

*“As you can see, the scourge is upon us, and we must, every one of us, be prepared to fight.”*

CONTENT IS A HAIRY, complicated beast. There’s stuff to research, sift through, create, curate, correct, schedule—and that’s before we start to think about publishing. What layout makes the most sense for this content? What organization? What metaschema? What platforms? Never mind post-launch plans, or lack of resources, or stakeholder alignment, or, or . . . yikes. No wonder we want to hide under the bed.

The content beast does not scare Erin Kissane. In fact, for her entire adult life, she’s been quietly taming it with a firm but gentle hand. As part of her hero’s journey, Kissane has collaborated with countless designers, developers, UXers, marketers, editors, and writers on projects of all sizes. This is good news for you: no matter what role you play, she gets what you do and knows why it’s important. And, because she cares, she wants to help you understand how content strategy can help make your life a little easier—and your end products a little more awesome.

Not that long ago, I wrote an article that called upon readers to “take up the torch for content strategy.” The book you hold in your hands is that torch. So run with it. Hold it high. Be confident in your pursuit of better content. You have *The Elements of Content Strategy* to light your way.

Come on out from under the bed. We have work to do.

—**Kristina Halvorson**

Author, *Content Strategy for the Web*  
CEO, Brain Traffic

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## Introduction

*“Content strategy is to copywriting as information architecture is to design.”*

—RACHEL LOVINGER

*“Content strategy plans for the creation, publication, and governance of useful, usable content.”*

—KRISTINA HALVORSON

IN THE WEB INDUSTRY, anything that conveys meaningful information to humans is called “content.”

Every website has content. Companies with three-page websites probably only need a writer. But those with hundreds or thousands of pieces of online content need someone who can stand back and figure out what all that content should communicate. They also need someone to decide how best to communicate it, who should make it, and so on—a sort of combination editor-in-chief and air traffic controller. They need a content strategist.

In the last few years, the value of content strategy has been articulated in dozens of blog posts, articles, and books, but it’s quite simple and worth repeating. Done well, content strategy:

- Helps companies understand and produce the kind of content their target audiences really need.
- Allows organizations to develop realistic, sustainable, and measurable publishing plans that keep their content on track in the long term.
- Cuts costs by reducing redundant or extraneous publishing efforts, while increasing the effectiveness of existing assets.
- Aligns communication across channels so that web content, print collateral, social media conversations, and internal knowledge management are working toward the same goals (in channel-appropriate ways).
- Prevents web projects from being derailed by the often major delays caused by underestimating the time and effort required to produce great content.

And this is only the beginning. Our discipline is in its infancy, and we’ve had only the tiniest peek at the internet’s full impact on the way we live and do business. Content strategy is rising because organizations all over the world have begun to realize that they desperately need it to handle their rapidly expanding online communications. Unless the planet gets hit by a comet, this trend is unlikely to reverse.

## What’s in this book

This book is not an argument for the importance of content strategy. Neither is it a tutorial, a workbook, or a gallery of deliverables. It will not show you how to turn your BA in English into a \$100,000 salary in ten easy steps. And it is emphatically not an exhaustive compendium of everything we know about content work. Instead it collects our discipline’s core principles, competencies, and practices for easy reference, divided into three sections:

- “Basic Principles” lays out our discipline’s shared values.
- “The Craft of Content Strategy” explores the collected expertise of the fields that have

contributed the most to our work.

- ~~“Tools and Techniques” provides a brisk walkthrough of approaches, methods, and deliverables used in the daily practice of content strategy.~~

You might think of these pieces as a (very) brief handbook, an introduction to a panel of potential mentors, and the key to the supply cabinet. Begin wherever you wish and end where you please. In the back of the book are additional examples and resources. When you're done here, please join the raucous online content conversation, if you haven't already.

When I get stuck on a project or intimidated by a blank page, there are a handful of books I reach for to remind myself what my options are: what else to try, what criteria I should use to judge my work, and how I might think differently about the obstacles ahead. If this book can be such a reference for some of you, I'll consider it a great success.

Onward.

# 1

# BASIC PRINCIPLES

IN CONTENT STRATEGY, there is no playbook of generic strategies you can pick from to assemble a plan for your client or project. Instead, our discipline rests on a series of core principles about what makes content effective—what makes it work, what makes it good. The first section of this book is organized around these fundamentals.

## Good Content is Appropriate

*Publish content that is right for the user and for the business*

There's really only one central principle of good content: it should be appropriate for your business, for your users, and for its context. Appropriate in its method of delivery, in its style and structure, and above all in its substance. Content strategy is the practice of determining what each of those things means for your project—and how to get there from where you are now.

### **Right for the user (and context)**

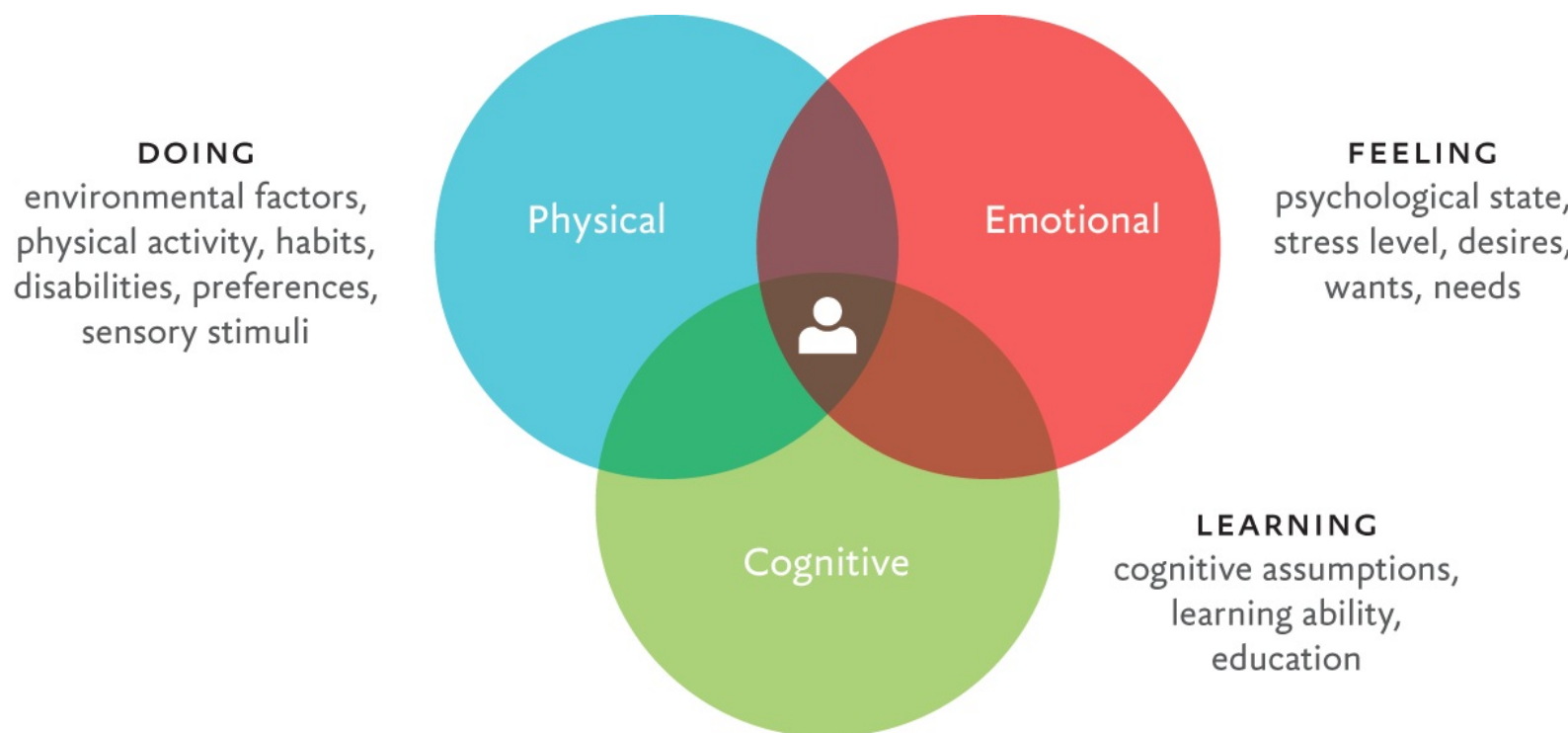
Let us meditate for a moment on James Bond. Clever and tough as he is, he'd be mincemeat a hundred times over if not for the hyper-competent support team that stands behind him. When he needs to chase a villain, the team summons an Aston Martin DB 5. When he's poisoned by a beautiful woman with dubious connections, the team offers the antidote in a spring-loaded, space-age infusion device. When he emerges from a swamp overrun with trained alligators, it offers a shower, a shave, and a perfectly tailored suit. It does not talk down to him or waste his time. It anticipates his needs, but does not offer him everything he might ever need, all the time.

Content is appropriate for users when it helps them accomplish their goals.

Content is *perfectly* appropriate for users when it makes them feel like geniuses on critically important missions, offering them precisely what they need, exactly when they need it, and in just the right form. All of this requires that you get pretty deeply into your users' heads, if not their tailoring

specifications.

Part of this mind-reading act involves context, which encompasses quite a lot more than just access methods, or even a fine-grained understanding of user goals. Content strategist Daniel Eizans has suggested that a meaningful analysis of a user's context requires not only an understanding of users' goals, but also of their behaviors: What are they doing? How are they feeling? What are they capable of? (FIG 1)



**FIG 1:** The user's context includes actions, constraints, emotions, cognitive conditions, and more. And that in turn affects the ways in which the user interacts with content. ("Personal-Behavioral Context: The New User Persona." © Daniel Eizans, 2010. Modified from a diagram by Andrew Hinton. <http://bkaprt.com/cs/1/>)<sup>1</sup>

It's a sensible notion. When I call the emergency room on a weekend, my context is likely to be quite different than when I call my allergy specialist during business hours. If I look at a subway map at 3:00am, chances are that I need to know which trains are running now, not during rush hour tomorrow. When I look up your company on my phone, I'm more likely to need basic contact info than your annual report from 2006. But assumptions about reader context—however well researched—will never be perfect. Always give readers the option of seeing more information if they wish to do so.

## Right for the business

Content is appropriate for your business when it helps you accomplish your business goals in a sustainable way.

Business goals include things like "increase sales," "improve technical support service," and "reduce printing costs for educational materials," and the trick is to accomplish those goals using sustainable

processes. Sustainable content is content you can create—and maintain—without going broke, without lowering quality in ways that make the content suck, and without working employees into nervous breakdowns. The need for this kind of sustainability may sound boneheadedly obvious, but it's very easy to create an ambitious plan for publishing oodles of content without considering the long-term effort required to manage it.

Fundamentally, though, “right for the business” and “right for the user” are the same thing. Without readers, viewers, and listeners, all content is meaningless, and content created without consideration for users' needs harms publishers because ignored users leave.

This principle boils down to enlightened self interest: that which hurts your users hurts you.

## Good Content is Useful

*Define a clear, specific purpose for each piece of content; evaluate content against this purpose*

Few people set out to produce content that bores, confuses, and irritates users, yet the web is filled with fluffy, purposeless, and annoying content. This sort of content isn't neutral, either: it actively wastes time and money and works against user and business goals.

To know whether or not you have the right content for a page (or module or section), you have to know what that content is supposed to accomplish. Greater specificity produces better results. Consider the following possible purposes for a chunk of product-related content:

- **“Sell products”**—This is so vague as to be meaningless and is likely to produce buzzword-infested fluff.
- **“Sell this product”**—Selling a product is a process made up of many smaller tasks, like discussing benefits, mapping them to features, demonstrating results and value, and asking people to buy. If your goal is this vague, you have no idea which of these tasks (if any) the content will perform.
- **“List and demonstrate the benefits of this product”**—This is something a chunk of content can actually do. But if you don't know who is supposed to benefit from the product, it's difficult to be specific.
- **“Show how this product helps nurse practitioners”**—If you can discover what nurse practitioners need, you can create content that serves this purpose. (And if you *can't* find out what they need before trying to sell them a product, you have a lot more to worry about than your content.)

Now do the same for every chunk of content in your project, and you'll have a useful checklist of what you're really trying to achieve. If that sounds daunting, think how much harder it would be to try to evaluate, create, or revise the content without a purpose in mind.

## Good Content is User-Centered

*Adopt the cognitive frameworks of your users*

On a web project, user-centered design means that the final product must meet real user needs and



fulfill real human desires. In practical terms, it also means that the days of designing a site map to mirror an org chart are over.

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In *The Psychology of Everyday Things*, cognitive scientist Donald Norman wrote about the central importance of understanding the user's mental model before designing products. In the user-centered design system he advocates, design should "make sure that (1) the user can figure out what to do, and (2) the user can tell what is going on."<sup>2</sup>

When it comes to content, "user-centered" means that instead of insistently using the client's internal mental models and vocabulary, content must adopt the cognitive frameworks of the user. That includes everything from your users' model of the world to the ways in which they use specific terms and phrases. And that part has taken a little longer to sink in.

Allow me to offer a brief illustrative puppet show.

While hanging your collection of framed portraits of teacup poodles, you realize you need a tack hammer. So you pop down to the hardware store and ask the clerk where to find one. "Tools and Construction-Related Accessories," she says. "Aisle five."

*"Welcome to the Tools and Construction-Related Accessories department, where you will find many tools for construction and construction-adjacent activities. How can we help you?"*

*"Hi. Where can I find a tack hammer?"*

*"Did you mean an Upholstery Hammer (Home Use)?"*

*". . . yes?"*

*"Hammers with heads smaller than three inches are the responsibility of the Tools for Home Use Division at the far end of aisle nine."*

*. . .*

*"Welcome to The Home Tool Center! We were established by the merger of the Tools for Home Use Division and the Department of Small Sharp Objects. Would you like to schedule a demonstration?"*

*"I just need an upholstery hammer. For . . . the home?"*

*"Do you require Premium Home Use Upholstery Hammer or Standard Deluxe Home Use Upholstery Hammer?"*

*"Look, there's a tack hammer right behind your head. That's all I need."*

*"DIRECTORY ACCESS DENIED. Please return to the front of the store and try your search again!"*

Publishing content that is self-absorbed in substance or style alienates readers. Most successful organizations have realized this, yet many sites are still built around internal org charts, clogged with mission statements designed for internal use, and beset by jargon and proprietary names for common ideas.

If you're the only one offering a desirable product or service, you might not see the effects of narcissistic content right away, but someone will eventually come along and eat your lunch by offering the exact same thing in a user-centered way.

## Good Content is Clear

*Seek clarity in all things*

When we say that something is clear, we mean that it works; it communicates; the light gets through. Good content speaks to people in a language they understand and is organized in ways that make it easy to use.

Content strategists usually rely on others—writers, editors, and multimedia specialists—to produce and revise the content that users read, listen to, and watch. On some large projects, we may never meet most of the people involved in content production. But if we want to help them produce genuinely clear content, we can't just make a plan, drop it onto the heads of the writers, and flee the building.

The chapters that follow will discuss ways of creating useful style guides, consulting on publishing workflow, running writing and editorial workshops, and developing tools like content templates, all of which are intended to help content creators produce clear, useful content in the long term.

Of course, clarity is also a virtue we should attend to in the production of our own work. Goals, meetings, deliverables, processes—all benefit from a love of clarity.

## Good Content is Consistent

### *Mandate consistency, within reason*

For most people, language is our primary interface with each other and with the external world. Consistency of language and presentation acts as a consistent interface, reducing the users' cognitive load and making it easier for readers to understand what they read. Inconsistency, on the other hand, adds cognitive effort, hinders understanding, and distracts readers.

That's what our style guides are for. Many of us who came to content strategy from journalistic or editorial fields have a very strong attachment to a particular style—I have a weakness for the *Chicago Manual of Style*—but skillful practitioners put internal consistency well ahead of personal preferences.

Some kinds of consistency aren't always uniformly valuable, either: a site that serves doctors, patients, and insurance providers, for example, will probably use three different voice/tone guidelines for the three audiences, and another for content intended to be read by a general audience. That's healthy, reader-centric consistency. On the other hand, a company that permitted each of its product teams to create widely different kinds of content is probably breaking the principles of consistency for self-serving, rather than reader-serving, reasons.

## Good Content is Concise

### *Omit needless content*

Some organizations love to publish lots of content. Perhaps because they believe that having an org chart, a mission statement, a vision declaration, and a corporate inspirational video on the About Us page will retroactively validate the hours and days of time spent producing that content. Perhaps because they believe Google will only bless their work if they churn out dozens of blog posts per week. In most cases, I think entropy deserves the blame: the web offers the space to publish everything, and it's much easier to treat it like a hall closet with infinite stuffing-space than to impose

constraints.

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So what does it matter if we have too much content? For one thing, more content makes everything more difficult to find. For another, spreading finite resources ever more thinly results in a decline in quality. It also often indicates a deeper problem—publishing *everything* often means “publishing everything we can,” rather than “publishing everything we’ve learned that our users really need.”

There are many ways to discover which content is in fact needless; traffic analysis, user research, and editorial judgment should all play a role. You may also wish to begin with a hit list of common stowaways:

- **Mission statements, vision statements, and core values.** If the people within your organization are genuinely committed to abstract principles, it will show in what they do. The exception is the small number of organizations for whom the mission is the product, as is the case with many charities. Even then, this kind of content should be supplemented with plentiful evidence of follow-through.
- **Press releases.** These may work for their very narrow intended audience, but putting them undigested onto a website is a perfect example of the how-we’ve-always-done-it mistake.
- **Long, unreadable legal pages.** Some legal awkwardness is acceptable, but if you want to demonstrate that you respect your readers, take the extra time to whittle down rambling legalese and replace needless circumlocutions with (attorney-vetted) plain language.
- **Endless feature lists.** Most are not useful to readers. The few that are can usually be organized into subcategories that aid findability and comprehension.
- **Redundant documentation.** Are you offering the same audience three different FAQs? Can they be combined or turned into contextual help?
- **Audiovisual dust bunnies.** Do your videos or animations begin with a long flying-logo intro? Do they ramble on for 30 minutes to communicate ten minutes of important content? Trim, edit, and provide ways of skipping around.

Once you’ve rooted out unnecessary content at the site-planning level, be prepared to ruthlessly eliminate (and teach others to eliminate) needless content at the section, page, and sentence level.

## Good Content is Supported

### *Publish no content without a support plan*

If newspapers are “dead tree media,” information published online is a live green plant. And as we figured out sometime around 10,000 BC, plants are more useful if we tend them and shape their futures to suit our goals. So, too, must content be tended and supported.

Factual content must be updated when new information appears and culled once it’s no longer useful; user-generated content must be nurtured and weeded; time-sensitive content like breaking news or event information must be planted on schedule and cut back once its blooming period ends. Perhaps most importantly, a content plan once begun must be carried through its intended growth cycle if it’s to bear fruit and make all the effort worthwhile.


This is all easy to talk about, but the reason most content is not properly maintained is that most

content plans rely on getting the already overworked to produce, revise, and publish content without neglecting other responsibilities. This is not inevitable, but unless content and publishing tasks are recognized as time-consuming and complex and then included in job descriptions, performance reviews, and resource planning, it will continue.

Hoping that a content management system will replace this kind of human care and attention is about as effective as pointing a barn full of unmanned agricultural machinery at a field, going on vacation, and hoping it all works out. Tractors are more efficient than horse-drawn plows, but they still need humans to decide where and when and how to use them.

No matter how we come to content strategy, or what kind of content strategy work we do, these shared principles and assumptions underlie our work. Of course, these principles didn't emerge from a vacuum. Content strategy is a young field, but it has evolved from professions that are anything but new. To understand the full scope of what content strategy can do—and to understand why it isn't “just editing” or “another word for marketing,” let's take a look at the professions that have laid the groundwork for our practice.

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1. The long URL: <http://www.slideshare.net/danieleizans/context-as-a-content-strategy-creating-more-meaningful-web-experiences-through-contextual-filtering> [↩]
  2. Donald Norman, *The Psychology of Everyday Things*, (New York: Basic Books, 1988), 188. [↩]



# THE CRAFT OF CONTENT STRATEGY

BECAUSE CONTENT has so frequently demonstrated its potential to derail web projects, and because it is uniquely entangled with business strategy, it requires special attention. Throughout each project, a content strategist compares evolving content-related expectations with available resources, and warns the team of shortfalls that may require that the content work be scaled back or the resources stepped up. She navigates the politically fraught territory of distributed publishing, and long after information architecture and visual design work is approved, she keeps an eye on the ways in which organizational strategy changes affect ongoing content work.

In short, she watches the hills for signs of trouble.

To do content strategy, defined as the planning and leadership of content projects and online publishing endeavors, is to run point. The term “run point” derives from a military term for the soldier or soldiers who moved ahead of the rest of the advancing troops: the point man. An equally influential and appropriate use in American English refers to the cowboy who rides at the front of a herd of cattle. The current version of Wikipedia article for “Take Point” notes in characteristically deadpan prose that “It is a hazardous position that requires alertness and ability to deal with unexpected attacks” (<http://bkaprt.com/cs/2/>).<sup>1</sup> Indeed.

In her role as point man, a content strategist works with other front-runners who lead various aspects of the project: information architects, technical leads, creative directors, and project managers. And in addition to leading content work, she plays a key role in what business consultants call “risk management.” Paradoxically, if your content strategist spots a problem late in a project and takes a hit—either by doing extra work or mandating a brief delay—that means the process is working. If someone’s going to hit a snag, you *want* it to be your content strategist, not the content creators or an SEO specialist or the person in charge of a database migration.

So naturally, if you’re the one doing content strategy, you need to be able to sniff out trouble and react quickly when it does arise. One of the best ways to prepare yourself for upcoming challenges is to push yourself beyond the boundaries of the field you came from. And that means learning about the other fields from which content strategy descends.

## A tangled family tree

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Marketers tend to characterize content strategy as a form of marketing—as do some technical communicators, though the latter group means it as an insult. Knowledge management people often say it's a way of improving processes and setting standards. Longtime web editors and writers tend to assume that it's what they've been doing all along. None of them are dead wrong, but neither are they completely right. And as the definitional debates rage on, it's increasingly clear that our discipline is vulnerable to being co-opted by nearby fields, or to being distorted by the fact that online, some of those fields are much louder and more public than others.

That's why we need to know our roots. If you know who you are—and how you got that way—it's going to be much harder for someone else to define you into a corner. Not to mention that if you know at least some of the tricks and traditions and history of your tribe, you won't have to reinvent it all by yourself.

### The origin of the species

It's nice to think of our field as a vigorous hybrid, but it often feels more like a Frankenstein's monster assembled from spare parts and animated by deadline-inspired panic. Also appropriate: the ancient Greek creature called the Chimera, a fire-breathing monster with the head of a lion on one end, the head of a serpent on the other, and a goat's head growing out of the middle of its body. (I'll just let you think about that for a minute.)

Designers have a pantheon they can point to: Paula Scher and Saul Bass, but also Bodoni and Gutenberg. Developers have cultural heroes like Alan Turing and Sir Tim Berners-Lee. These disciplines have legacies and shared principles. *Design should communicate. Elegant code is better than sloppy code.*

Though it lacks a goat head, content strategy also has a legacy. Several, in fact. And each has plenty to teach us. A complete genetic breakdown would require a separate book, so for now, let's consider the four most influential fields: editorial work, curatorial work, marketing and persuasion, and information science.

### Influence #1: The Editor

Editorial work is so closely related to content strategy that questions about the difference between the two often arise. From the outside, content strategy can look quite a lot like the sort of editing found in magazines and newspapers. The editorial world, and that of publishing in general, has a lot to offer us.

For people outside of the publishing industry, the title of editor may raise the specter of the cranky, scotch-drinking, overcoat-wearing, borderline dysfunctional editors played by the likes of Humphrey Bogart and Cary Grant. Alternatively, those traumatized as children by English teachers may expect an editor to pride herself on being a “stickler” and whack you on the knuckles when you split an infinitive.

It's true that an ear for correct language is helpful and that a passion for getting the story told right is indispensable. ~~But real-world editing is much more about crack organizational skills, a habit of~~ developing practical communication ideas, and the ability to deal firmly and diplomatically with the whole crew of people involved in getting a book, newspaper, or website from concept to delivery. Editors don't just assign stories and make margin notes in blue pencil: they develop themes and narrative arcs, orchestrate responses to other publications and outside events, maintain a balanced variety of articles or books, evaluate and manage writers and other content creators, and much more.

Leaving aside the knuckle-whacking, editors have plenty to teach us about handling content.

## **Content people work for the user**

In publishing, if you don't win, hold, and reward the attention of your readers—whether they're fans of tabloid journalism or wistful MFA-program novels—you're out of a job. Editors worth their salt work not for writers or publishers, but for readers.

Though content specialists must often mediate between product teams, marketing and corporate communication departments, special initiatives, and development staff, we too work for readers. In *Content Strategy for the Web*, Kristina Halvorson writes:<sup>2</sup>

*...online, you don't have a captive audience. You have a multi-tasking, distracted, ready-to-leave-your-site-at-any-time audience who has very specific goals in mind.*

*If your content doesn't meet those goals, and quickly, they will leave.*

This fact—that the reader's interest and attention is the central, precious thing—is the professional editor's mantra. Here's one of my favorite passages from Arthur Plotnik's wonderful *The Elements of Editing*:<sup>3</sup>

*An editor's only permanent alliance is with the audience, the readership. It is the editor's responsibility to hook that readership to edify it, entertain it, stroke it, shake it up . . . Authors know their subject. Editors specialize in knowing the audience.*

Great writers know what their readers want and need to hear. But the responsibility for validating assumptions about the audience and tuning the content to suit that audience remains with the editors—and now the content strategists—of the world. Paradoxically, it's only by working tirelessly for our readers that we can genuinely serve our clients and employers.

## **Stories matter**

Humans are compulsive storytellers. We think and teach and connect by creating stories. And the thinkers who change opinions, the teachers who inspire students, the politicians who win elections, and of course, the publishers who sell books and magazines all tend to have something in common: they can tell a great story.

For anyone who communicates as a profession, stories are the ultimate hack.

Whatever corner of the publishing world they come from, editors know how to help other people tell

the best, most engaging stories they can tell. Content people with backgrounds in journalism or publishing usually have the basics of storytelling down cold, but the rest of us can learn from the storytelling principles of these fields—from the basics like building a lead that hooks the reader (and supporting it with facts and quotations) to sophisticated techniques for layering in secondary narratives.

If you're not entirely comfortable with your understanding of storytelling, it can be helpful to go back to the elementary principles taught in high-school journalism classes—familiar concepts like:

- **The inverted pyramid:** This term describes a classic news story structure in which all the most important basic information appears at the beginning of the story, and is followed by less important information ordered from most important to least important. “Important” here means important to the reader. Note that this is the exact opposite of the fluffiest sort of marketing copy that begins with statements like “The world of international business is getting ever more complicated.”
- **5 Ws and an H:** You may remember this one from grade school. It's intended to remind writers that they need to explain the basics of every story: what happened, who is involved, when and where it happened, why it happened, and how it happened. If you happen to be writing marketing copy, this might translate to what the product is, who it's made for, why the intended audience should buy it, how it works, and when and where you can get it.
- **Show, don't tell:** Instead of going on and on about how wonderful and leading-edge your widget is or how much your client cherishes its mission statement, give evidence. Show results, statistics, case studies, personal narratives, and demonstrations of action, and give the puffery a rest.

Of course, these principles are mere starting points. Storytelling isn't something you learn from a list of tips or a podcast about narrative tricks. You *can* learn a lot by analyzing structure and practicing technique, but you also have to dig in and read, watch, and listen to the great stories being spun by novelists, journalists, screenwriters, and—yes—bloggers and marketers. (This will make you not only a better content strategist, but also a more interesting dinner companion.)

But why bother with all that if you're not going to be creating the content yourself? Primarily, because most content strategy projects deal with narratives: brand messages, overarching themes, and communication plans all center on the reader's progression through a series of ideas. And secondarily, because if you're going to design guidelines and processes for content creators, you need to understand narrative well enough to give them the right tools for telling strong stories.

Finally, a word on working with storytellers.

One of the spookiest aspects of the editorial craft is the ability to nudge, cajole, or otherwise wrangle each author into producing his or her best work *without* diluting the individual author's voice and perspective. It's tricky as hell and requires an ever-shifting balance of tact and frankness. Whenever you approach content creators, it's worth spending a little extra effort on communicating with them in ways that neither devastate nor condescend.

## **Publishing is hard**



In the brief history of the internet so far, two kinds of content-related train wrecks stand out:

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- project delays produced by the inability to get the right content ready for launch, and
- project derailments caused by a lack of planning for ongoing content oversight, production, revision, and distribution—what Jeffrey MacIntyre of Predicate, LLC, aptly calls “The Day Two Problem” (<http://bkaprt.com/cs/3/>)<sup>4</sup>.

Both problems are caused by underestimating the time, attention, skill, and money required to plan, create, and publish content, both immediately and in the long term. As a species, we’ve been doing a that since about 2000 BC, so we happen to know quite a lot about it. But before the internet, the vast majority of people who had to worry about the nuances of publishing were . . . publishers.

Now that organizations ranging from hospitals and libraries to boutiques and family vineyards have all learned that doing business online involves dealing with content, the gritty details of the publishing process have become relevant to a much wider group. If you need to produce useful, high-quality content at any level beyond the personal weblog, you need an editorial process that will support creation, review and revision, publication, performance tracking, and ongoing maintenance. (You’re also going to need resources, primarily in the form of time, which gets paid for with money.)

As content strategists, we can help our teams and clients communicate more effectively by introducing common tools of the publishing trade. Tools such as:

- **clearly documented editorial workflows**, including approval processes and thorough quality checks;
- **editorial calendars** including content campaigns and themes planned well in advance; and
- **content custom-tuned for specific channels and audiences.**

Most importantly, editors can teach us quite a lot about how to regularly publish original content that readers can use. In part, they can demonstrate how to hire and manage writers who can listen to experts, and then collect and create content that extends well beyond executive bios and annual reports.

Our clients and employers are beginning to understand that they need to do more than simply hire a web writer at the end of a project and hope someone else will maintain the content later. As their content specialists, the more we know about solid editorial practices, the better we can help our clients with the transition to the new world of distributed online publishing.

## **Content is expensive**

Useful content is expensive. This is a fact that editors have long understood, but web companies have only just begun to discover.

Leaving aside the effort required to publish a daily newspaper, consider just the people involved in book publishing: the acquisition editors, development editors, copyeditors, proofreaders, book designers, compositors, project managers, cover designers, and sales and marketing teams. In traditional publishing, these people are paid. As are the accountants, secretaries, printers, and everyone else who isn’t an intern.

Now consider the marketing lead who receives word that he must now review and revise forty pages content inherited from another department, ensure that new brand guidelines are implemented in all newsletters and emails, and produce an episode of the company's new video series. In the next three weeks, with no budget increase, and without ditching other responsibilities.

Content strategy recommendations made without consideration of available resources are unlikely to result in success. When we work with big organizations, we may be able to simply note that our recommendations will require additional resources to execute. With smaller companies, we can't simply assume that our clients will magic up an extra twenty hours a week to implement a full-scale "content marketing" plan—or anything else very time-consuming. In some cases, we may have to limit our plans to things that can be accomplished by reshuffling existing staff members and budgets. Whatever the situation, it's our responsibility to:

- **Understand existing resources:** Are there people available to work on content? Are they good at it? What kind of training do they need? Are there other writers or editors in the company who might be made available to help? Is there a budget for hiring freelancers or new staff members?
- **Make the business case for content strategy:** How will the recommended content changes meet overarching organizational goals? Will they replace less efficient processes, and if so, what resources will they free up? Will they directly contribute to revenue increases by boosting sales? Cut costs by reducing customer service hours? Bring in new business by improving the company's brand image?
- **Prepare clients and managers for organizational change:** Can we begin introducing new systems and processes well in advance of publication deadlines? If new people will be hired, can we help with job descriptions or make hiring recommendations? Can we refer talented, reliable freelancers?

At the end of the day, we and our clients must remember that content is created (and revised and maintained) only when a human being is assigned and paid to do so.

The notion that content is expensive brings up another topic as well, though it's one this book lacks the space to address. Within the field of content strategy, a sub-specialization dedicated to the *business* side of large-scale content production and distribution has begun to emerge. Although many organizations produce content under the aegis of marketing or fundraising, some are in the business of content itself. Publishers qualify, of course, but so does the sprawling beast we call the entertainment industry and the many new kinds of companies that have sprung up to take advantage of the internet's ultra-cheap distribution model. Content specialists who have a talent for financial strategy and the nerve to experiment will likely find this niche both interesting and lucrative.

## Influence #2: The Curator

The word "curator" comes from the Latin "cura," meaning care. The original curators cared for public resources in ancient Rome: grain and oil supplies, aqueducts, public account books, and roads all had their own curators. In fourteenth-century England, the term came to refer to Christian clerics whose primary responsibility was the spiritual cure or care of their parishioners. In the 1660s, we finally begin to see the word begin to refer to "the officer in charge of a museum, gallery of art, library, or the like; a keeper, custodian" (<http://bkaprt.com/cs/4/>).<sup>5</sup>

In a consideration of this evolution, art-world critic David Levi Strauss writes that curators “have always been a curious mixture of bureaucrat and priest” (<http://bkaprt.com/cs/5/>),<sup>6</sup> balancing practical administration with the care of the soul. And as content strategist Dan Zambonini has written, these museum and gallery curators care *for*—rather than merely *about*—their collections (<http://bkaprt.com/cs/6/>).<sup>7</sup>

And this gets to the heart of our work as content strategists. We must plan for the orderly acquisition, cataloging, and practical maintenance of the content in our care. But just as much, we must protect its essence and truthfulness, and keep it safe from creeping degradation of quality and tone. In both of these contexts, curators can offer useful tools, frameworks, and lessons.

## Immersion matters

In a 2006 interview, the late Anne d’Harnoncourt, director of the Philadelphia Museum of Art for twenty-six years and daughter of famous curator and museum director René d’Harnoncourt, was asked for a word of advice to young curators. Her advice was “to look and look and look, and then to look again, because nothing replaces looking . . . to *be* with art.”<sup>8</sup>

Most of the content that most of us work with (most of the time) is not art. But the curatorial notion of consciously *being* with art—what critic Michael Fried calls “presentness”—is doubly relevant to our work.<sup>9</sup>

In one sense, it can refer to our own immersion in the content we work with—our pursuit of a knowledge that goes beyond simple familiarity. In the same interview mentioned above, d’Harnoncourt discussed her father’s groundbreaking 1939 exhibition of Native American art at the World’s Fair in San Francisco. René d’Harnoncourt, she recalls,<sup>10</sup>

*spent years of his life really getting to know the people who made these objects, and so when he presented them, whether it was a sand painting, or totem poles from the north-west coast, or whatever it was, he tried to do . . . something that really respected the context in which it was made and at the same time would allow it to communicate to an audience not accustomed to seeing these things as the very, very beautiful and powerful things that they were.*

The degree of expertise, sensitivity, and good judgment required of prominent curators may seem excessive to the content specialist whose “collections” reside in databases, but this description of a curator’s work should be ringing bells. To do our jobs well, we must balance an understanding of the context in which content is created (sourcing, business goals, workflow) with an understanding of the context in which it is read and used (user needs, delivery channels). And immersion in both worlds is what makes the right balance possible.

The second way in which curatorial ideas about presentness and focused attention cross into our discipline is all about the user.

In effective museum and gallery installations, visitors are usually invited to spend time simply being with art—or artifacts or other content. Curators and exhibition designers understand that people require certain things to have concentrated experiences: things like unobstructed access, good light, and freedom from distractions.

Now imagine going into a museum and trying to walk up to a Matisse, only to run into a glass wall ten feet away from the painting. To get past the wall—which is now frosted so you can't see the painting at all—you have to write down your full name and address, and then show ID to prove that you are who you say you are. Once you've submitted to all this, you discover that the "painting" is only a small print—you have to go into another room full of billboards to see the original. Finally, you reach the painting. The descriptive label is written in miniature gray text on a slightly lighter gray background, so forget trying to read that, but here at last is the art.

That's when the circus clowns pop out of the woodwork and start honking little horns and waving signs advertising tooth-whitening products and diet pills. This is content online.

The fact that anyone reads anything at all online is a demonstration of an extraordinary hunger for content. Leaving aside the distractions of email, other websites, and real life, we have built tens of thousands of websites around the idea that no matter how demanding, annoying, and abusive our sites become, our readers will keep coming back for our content. But is this really the best we can do? Of course it isn't. And we should consider it part of our work as content strategists to ensure that all the effort and attention poured into creating and managing great content isn't drowned out by interfaces that obstruct, annoy, and distract.

In a 2009 *A List Apart* article, designer and editor Mandy Brown challenges web designers to create space for readers. Echoing d'Harnoncourt, Brown advises designers that to do so, they must first allow themselves to become absorbed in the text (<http://bkaprt.com/cs/7/>):<sup>11</sup>

*As a designer, the only way to ensure that the page makes for good reading is to read it yourself; to relinquish the design sensibility that is inclined to look at text and take the time to actually read it. It's not an easy task, but then, neither is reading on the web, and making the effort may help you empathize with the reader's plight. The web is still a noisy, crowded place—but it is also limitless, and surely we can find space enough for reading—a space where the text speaks to the reader and the reader does not strain to hear.*

In addition to attending to design considerations like whitespace and typesetting, we can act as user advocates by advising our clients and employers to reduce distractions in sidebars, fight ads that obstruct content, and give readers the equivalent of good light and a quiet room. This is one of the reasons that a multidisciplinary approach can potentially produce better results than content-only gigs for some kinds of projects—when content specialists can weigh in on presentation and design, readers benefit.

## **Users are people, too**

Much of the design and planning work done in major museums and galleries is not theoretical, or even particularly curatorial. Curators and other museum workers deal with physical objects and corporeal humans in real spaces. And those humans, being mammals, need things like places to sit, reasonable ambient temperatures, wheelchair ramps and other accessibility aids, drinking water, and bathrooms. In larger museums, they also need security guards to protect them from each other, friendly staff members who can provide information in several languages, well designed maps, and someplace to get a sandwich and a coffee.

On the web, we deal with each other in heavily mediated ways, but we're all still primates. We need accommodations for the thousand disabilities that we experience; ways of marking and saving

information for later so we can take breaks; ways of skipping through content when we're in a hurry; friendly orientation and navigation aids; access to real human assistance, via live help, telephone, email, or any other reasonable channel; and the ability to consume content on the devices and in the locations of our choice.

But aren't these user experience concerns? They are indeed. And as content advocates, we should be ready to contribute to the design of user experiences that involve our content.

In short, we should strive to create and present content in ways that respect the fact that even when they're using the web, people need to pee.

## **“Painstaking” isn't an insult**

Museum and gallery curators often handle priceless, irreplaceable objects. Accordingly, they use formalized and meticulous processes for accepting, describing, and tracking the items they care for. Similar processes, applied to content, can significantly reduce the chaos of large-scale content projects, but they need not stop there.

Most content specialists who lead large projects have learned to institute orderly content-documentation processes well before a new site launch, largely because the alternative is so painful. But although taxonomies and metadata matter quite a lot, it's easy to accidentally omit other potentially important information:

- What information about content sources and types should we record to ease future display, reuse, revision, and expansion?
- When content is added or revised, how can we usefully document the reasons for the change? And how can we ensure that ongoing, distributed revisions fit within a larger communication strategy?
- What processes might let us track and reuse our content resources over time? What kind of reporting, analysis, and publishing tools would such tracking and reuse require? How can we structure our content to promote reuse in interesting ways?
- How might we use analytics and other tools to understand which assets we're under-using?

We'll return to some of these notions in a few pages, but for now, it's worth noting that a curatorial approach to long-term content management crosses over into the domain frequently occupied by IT teams, marketing departments, and the “webmasters” of the past.

## **Influence #3: The Marketer**

Marketing is the practice of bringing products to market and persuading people to buy them. The “products” involved may be literal (eggs, laptops, ebooks) or metaphorical (ideas, experiences, political candidates), and the means may include techniques ranging from the obvious to the extremely subtle. Content strategy is not a subset of marketing, but marketing is one possible application of content strategy, and we derive many common content strategy methods and practices from marketing.

Most of marketing is, in turn, derived from rhetoric: the practice of writing or speaking to persuade. From the moment of its birth, rhetoric has been viewed with a certain amount of suspicion. Back in the fourth century BC, Plato compared rhetoric to the black art of cooking, which makes unhealthy food taste good and thus is (like rhetoric) a kind of deception. (Of course, Plato also suggested that his utopian republic would only succeed if everyone ate and slept on the floor and consumed only bread, nuts, and berries; meat, tables, and beds all led directly to doom.)

This cultural ambivalence about the arts of persuasion is nowhere more clear than in the world of marketing.

## **Rhetoric and persuasion, whether you want 'em or not**

When we create content for businesses and other organizations, we usually need to do more than inform or entertain. In theory, there are exceptions—newspaper sites and so on—but for most businesses and institutions, online content is also intended to intrigue, to persuade, and ultimately, to sell.

Happily, this doesn't mean that websites should be like direct mail. Sometimes “selling” is so subtle as to be nearly invisible, and sometimes it's as straightforward as saying “we made this cool thing that you can use to do great stuff—would you like to buy it?” Mostly, it's somewhere in between. And the principles of persuasion (rhetoric) and selling (marketing) are something that modern western civilization has down cold.

Rhetoric constitutes one of the three parts of the trivium—a big chunk of the old-school classical education—and is also a highly contested field of academic study. I will now oversimplify to the point of cartoonishness.

According to Aristotle, the three kinds of rhetoric are:

- The rational argument (logos). *Our widget will produce these benefits for your company, as you can clearly see from this table of research data which I have printed in six-point type. Ta-da!*
- The emotional appeal (pathos). *Happy memories are the most precious things in our brief, sad lives. Won't you buy this widget to make you some happy memories?*
- The appeal grounded in the speaker's reputation or character (ethos). *As a thought leader in the fields of both thought and leadership, I tell you: Buy this widget. You won't regret it.*

The principles of rhetoric are embedded in our culture of communication, appearing not only in marketing, but opinion columns, blogs, and, of course, political speeches—the latter being the original rhetoric, from the world's original democracy.

In the language of marketers, “messages” are very high-level ideas you want to transmit directly into your users' brains, and they're created by combining *what* you need to say with a rhetorical approach—*how* you need to say it. These messages aren't taglines; they're for internal use and will act as scaffolding for your content, supporting and shaping the content you actually produce. (You may also hear them called “messaging,” but let's avoid that invitation to the grammar smackdown.)

To see how this plays out, consider the messages that a flower shop in Brooklyn, an upscale hotel

catering to business travelers, and a state university might assemble (if they were a little punchy and over-caffeinated) (TABLE 1).

**TABLE 1:** The three major kinds of rhetorical appeal as applied to hypothetical client situations.

CLIENT	CORE IDEA	RATIONAL APPEAL	EMOTIONAL APPEAL	REPUTATION-BASED APPEAL
Local florist	Our flowers are the freshest.	Our flowers last 30% longer and are more beautiful because they're so fresh.	Vibrantly fresh flowers will make your life feel beautiful.	Our family has been in the floral business for 100 years. We know from fresh.
Business hotel	We're less hassle than other hotels.	Choose us and you will spend less time during registration and checkout. Guaranteed.	From the moment you walk in the door, you're in your own personal office—or private executive lounge.	We've served more traveling executives than anyone else, so we understand what business travelers need.
State university	Our academic programs are strong.	Most of our programs are ranked in the US News and World Report Top 25, and 70% of our graduates go on to pursue master's or doctoral degrees.	Apply here to study with the most inspiring professors this side of Hogwarts.	We are the most selective state university in the US, and our faculty offers an unparalleled reputation for excellence in their fields.

In most cases, at least some brand messages will have been handed down from an internal marketing group. And remember, if you're working on content strategy and you've been given only top-level messages, you're well within your rights to push for more specific messages to help you shape your content. In fact, doing otherwise would be a mistake.

There's a whole lot more to rhetoric than this tiny nibble can convey, and it's a field begging to be examined by content specialists of all kinds. Content consultant Colleen Jones puts it this way (<http://bkaprt.com/cs/8/>):<sup>12</sup>

*Rhetoric is the study of using language to persuade or influence. It's been around since Aristotle. How can we ignore rhetoric: the persuasive use of words—as we try to make our word-filled websites persuasive? That would be like trying to bake a delicious cake with no understanding of flour, milk, or chocolate.*

Crimes against cake are not to be ignored, and neither is the rich tradition of rhetoric. And if the modern language of marketing makes you twitchy, a good dose of rhetorical theory may be just what you need to get your brain in gear and create persuasive content. (If this subject interests you, get the to a copy of *Clout*, by Colleen Jones. It's a superb resource for content people, whether or not they're in marketing, and it has an entire chapter on rhetoric that is vastly more sophisticated than my comic book overview.)

## Evaluation rocks

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Marketing people—and especially their advertising brethren—succeed when they persuade their target audiences to act in a particular way. In other words, they can measure success by measuring how many new desired actions they’ve inspired. In the print world, this has long been a sticky problem. If you run shampoo commercials on television while also putting ads in magazines and on the sides of city buses, how will you know which part of your campaign is helping the most? This problem is why marketers invented coupons and discount codes—they’re trackable.

On the internet, things are different and just about everything ad-viewers and other web users do can be tracked and analyzed. In the last 15 years, marketers have made a science of online performance analysis, and there’s an intimidatingly large body of literature (well, maybe “literature”) on the subject, about which more in [Chapter 3](#). For now, consider this: if you’re going to work with content on the internet, you need to make and execute a solid plan for determining whether or not what you do works.

If you’re coming to content strategy without a marketing background, it may be hard to tell the broadly genuinely useful approaches from the Google-Ad-Your-Way-To-Success stuff. I quite like Eric T. Peterson’s *Web Analytics Demystified* and *The Big Book of Key Performance Indicators*, which take a more holistic approach to performance measurement than most books that focus exclusively on hit counts and click-tracking. Both books are out of print, *but* both are available as free downloads from the author’s website (<http://bkaprt.com/cs/9/>).<sup>13</sup>

## Channels differ

In the marketing world, “delivery channels” used to mean “ways of distributing actual products.” Now it means about six different things, so let’s be clear. When I say “distribution channel” and “channel strategy,” I’m talking about the method of getting content to its intended audience. Methods like:

- “The website”—what you think of when you imagine a corporation’s main website
- Sites aimed at subsets of the main audience (microsites, topical sites) or specific regions (often in translation or with content created for local audiences)
- Blogs, whether or not they live within another site
- Newsletters
- Social communication channels (Facebook, Twitter, and their hundred million friends)
- Webcasts, podcasts, and video series
- Online magazines
- Mobile applications
- Third-party applications, publications, and sites
- Downloadable text-based content like whitepapers, ebooks, and special reports

And channel strategy? That’s the part where you use all the things you’ve learned about your users and your business goals to figure out the best way of getting your content to your humans. Marketing people have been thinking about this for a long time, and have a lot to teach about it.



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