

Content Strategy

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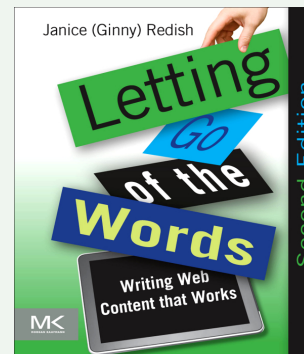
www.redish.net



@GinnyRedish



Ginny Redish



[2nd edition](#)
[Elsevier, 2012](#)

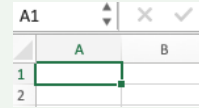
Virtual workshop
Plain Language Summit 2020
October 28, 2020

Topics for this session

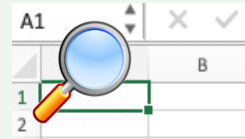
- Differentiating strategy and tactics
- Defining content strategy
- Considering scope and topics for a content strategy
- Creating your content strategy:
Discover, Plan, Align, Use, Govern
- Using the strategy – tips on tactics
- Time for your questions and comments

People tend to talk about the tactics

Inventory the content



Audit the content



Hire and train writers, editors



Set and follow an editorial calendar



Write, edit, design, publish



But tactics are different from strategy.

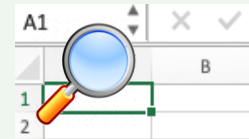
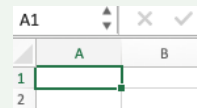
Strategy drives the tactics

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

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



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Defining content strategy – 1

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

Kristina Halvorson
and Melissa Rach

Content Strategy for the Web

2st edition, New Riders, 2012, p. 28



Defining content strategy – 2

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

Margaret (Pegi) Black

How is *Content* Strategic? and How is Content *Strategic*?

Content Strategy DC, 3/28/19

Defining content strategy – 3

Content strategy

Thinking strategically about your content

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

Ginny Redish

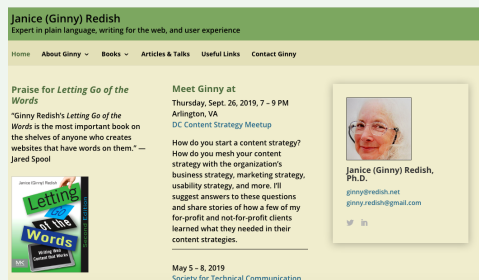
In many workshops
through the last decade

Also see Ahava Leibtag
The Digital Crown



What content should a content strategy cover?

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



An example of scope: Minnesota Revenue

Problem: Too many phone calls about letters to taxpayers

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



Discovery: Letters to taxpayers were not in plain language

Success: Fewer phone calls

ClearMark award (finalist, 2016)

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

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

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

Subject: Notice of intent to offset

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

Debtor name: ADAM LAST

Debt type: 2009 Individual Income Tax - Audit

Amount due: \$1,541.63

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

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

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

Options for making payment:

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

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

The Minnesota Department of Revenue may take your federal payments

Debtor: TEST TEST
Debt Type: METRO STATE U General Accounts Receivable
Amount Due: \$801.42

Why can you take my federal payments?

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

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

Will you still take my federal payments if I already have a payment agreement?

Yes. The terms of your payment agreement include collecting federal payments and refunds to pay your state debt. Your payment agreement will continue as scheduled.

What federal payments can you take?

We can only take payments allowed under federal law. Some examples are below.

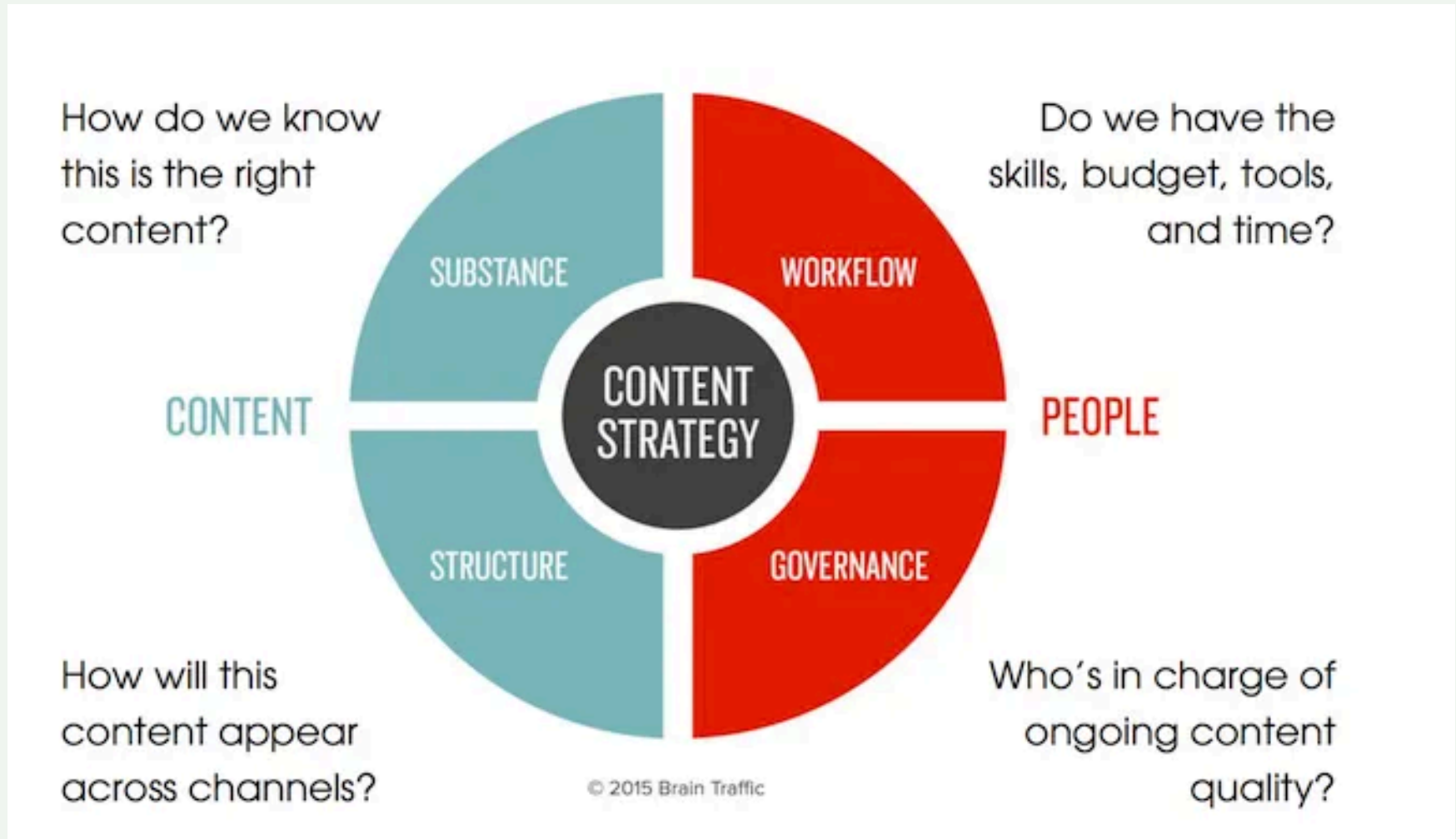
We can take	We cannot take
<ul style="list-style-type: none">• Vendor or contractor payments• Expense reimbursements• Travel advances• Certain types of grants	<ul style="list-style-type: none">• Federal tax refunds• Social Security income• Veterans benefits• Railroad retirement benefits

What happens next?

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

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

What topics should a content strategy cover?



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

How do we get to a content strategy?

Discover

Plan

Align

Use

Govern

Discover the situation before you plan

Discover

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

Plan

Align

Use

Govern

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

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

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

What problem are you trying to solve?

Organization's goals + users' needs



Our Mission

Working together to fund Minnesota's future.

Our Vision

Everyone reports, pays, and receives the right amount: no more, no less.

+



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Organization's mission
and goals



Strategy



Tactics

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



Another example: www.ready.gov

Mission and goal



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

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



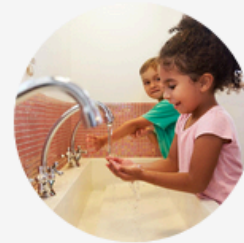
<https://www.ready.gov>



Cybersecurity

Learn how to prevent, detect and respond to cyber incidents.

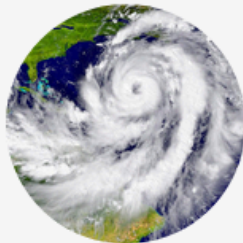
[Get Cybersecurity Tips](#)



Pandemic

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

[Learn How to Stay Safe](#)



Hurricanes

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

[Get More Hurricane Tips](#)



Prepare for Earthquakes

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

[Get Earthquake Tips](#)



Wildfires

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

[Get Wildfire Tips](#)



Flooding

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

[Prepare for Flooding Now](#)

How do we connect the organization and users?

The content of _____

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

will be successful if

[these people] _____


[do this] _____.

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

How do we keep our users in our minds?

Personas!

Morgan a Member of the Public



Members of the public are
Individuals living in and around the County
Commuters
Students
Teachers
Website visitors speak English, Spanish and a variety of other languages.

Motivations
I do everyday things

- Use public transit
- Find a job
- Stay in compliance with county laws and regulations
- If I encounter a problem, I need to connect with the County for help

The information is all there, but finding it isn't enjoyable...it looks pretty dated.

I don't want to have to read a lot of text to find out that I have to navigate to another place. Make it more user-friendly.

It's cumbersome to search unless you know the exact name of the department.

I am a first time juror. I am looking for information about what I need to do.

Help me find the information I need quickly.

About me

First visit: [red bar] Monthly Daily

Age 18 [red bar] Age 60+

High school [red bar] College Post grad

Tasks

Get transit information
Example: Plan a trip, get schedules

Access court & legal information
Example: Find marriage and divorce information

Find health information
Example: Find a clinic, get list of shots (immunizations)

Get natural resources information
Example: Find parks and hiking trails


Manage property (for property owners)
Example: Pay property taxes

Stay informed
Example: get election results, find out what's going on in my community

Information needs

- Low learning curve
- User-centered, not organization-centered
- Broad range of questions: must access everything from *Preventing bed bugs* to *What is the County doing to improve the County?*

“Don't primarily organize content by department... If I need to get a plumbing permit I don't care what department issues it. I just want a plumbing permit.”



Live outside
Live in County
~87%

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

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

Plan for all the elements of a content strategy

Discover

Plan

Align

Use

Govern

Processes

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

People

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

Policies

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

Pay – Budget!

Priorities – What to tackle first

Collaborate to get to your content strategy

- Form a cross-functional team
(related to the problem and the scope)
- Together, go through Discovery, Planning, Aligning
(The team may need facilitation and training to do this.)
- Convince people the problem is real
 - Get relevant data:
web analytics, error rates on forms, phone calls, . . .
 - Do a usability test of the current content:
website, letters, forms, fact sheets

Training helped WA DSHS remove silos – 1

Washington State Department of Social and Health Services

Before content strategy

Washington State Department of Social & Health Services
DSHS
People Helping People
DSHS is a family of programs & services helping 1.3 million children & families each year.

Ways We Can Help

- Business Resources
- Resources for Reporters
- DSHS in Detail
- Employment
- Information for Citizens
- Rule Making

Online Services

Access state agencies and government information

[@access.washington](#)

Contact Us || Questions || Privacy || Forms || Publications

REPORT CHILD & ADULT ABUSE
1-866-ENDHARM

REPORT FRAUD
1-800-562-6906

TOLL FREE

What's New

In response to the state budget crisis, DSHS submitted [15 percent budget reduction](#) options to the Governor's Office of Financial Management (OFM). See the [full list of options](#).

On November 2, Secretary Braddock discussed his request to the [Bench-Bar-Press Committee of Washington](#) that the committee consider including civil litigation in its long-standing voluntary guiding principles for protecting the public's right to a free press and its right to a fair trial.

[Approximately \\$51 million in federal funds per year are ensured for DSHS](#) after it successfully passes a stringent audit that reviewed how the department spends federal care money to support foster care and adoptions.

[J. Douglas Porter](#), a veteran health-care administrator who has supervised medical assistance and health programs from Maine to California, has been selected to head Washington's Medicaid program.

Advice from DSHS experts on how to emotionally [cope with the stress of the national tragedy](#), plus advice for parents on how to [help their children work through any lingering fear](#) caused by the September 11 attacks.

Medicaid Reform: DSHS is seeking public comment on a proposed Medicaid waiver that would give the state more flexibility to manage the cost drivers, programs, and benefit packages involved in medical assistance.

New Web Sites

Division of Child Support Internet Payment Service: This site is designed to ease the process for employers and individuals submitting child support payments. The application offers an easy and user friendly format that allows Electronic Funds Transfer.

Division of Developmental Disabilities: The newly designed DDD site adopts the look and feel of the DSHS Internet and improves access and information. Read about DDD programs and services and find out who to contact for more information. Links to other developmental disabilities resources have been expanded.

→ News

→ Different offices' websites

Training helped WA DSHS remove silos – 2

After training with reps from every division

The screenshot shows the DSHS website homepage. At the top is a banner with the text "Washington State Department of Social and Health Services" and "DSHS PEOPLE HELPING PEOPLE" next to a collage of diverse people. Below the banner is a green "LET'S TALK" button with a speech bubble icon and the text "Join the conversation with DSHS and community members". To the right is a search bar with a "Search" button. On the left is a vertical navigation menu with buttons for "Apply for Services", "Office Locations", "Topics A-Z", "About DSHS", "Questions", "Jobs", and "News". The main content area is divided into three columns. The first column has a section titled "AVAILABLE SERVICES" with a list of services: "Help with food", "Cash assistance", "Medical help", "Mental health", "Treatment for addictions", "Adoption", "Child care", "Child support", "Foster parenting", and "Medical insurance for kids", followed by a link for "...more services". Below this is a section titled "How Do I?" with a list of actions: "Report abuse or neglect: 1-866-363-4276", "Find out if I qualify for basic services", "Apply for services (such as food, cash, child care, etc)", "Find job opportunities", "Find a local service office", "Get a form or publication", "Lookup rules and policies", and "Join a conversation with DSHS". The second column has a section titled "INFORMATION FOR..." with a list of user groups: "People in need", "Providers", "News media", "Researchers", and "DSHS employees". The third column has a section titled "PROGRAMS AND ADMINISTRATIONS" with a list of programs: "Aging and Disability", "Alcohol and Substance Abuse", "Health Care Assistance", "Juvenile Rehabilitation", "Residential Habilitation Centers", and "Social Commitment Center".

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

Training helped WA DSHS remove silos – 3

Today

Vision

- People are healthy,
- People are safe,
- People are supported,

Mission

As a Department we are tied together by a single mission: to transform lives.

The screenshot shows the homepage of the Washington State Department of Social and Health Services. At the top, there is a dark blue header with the department's name and a search bar. Below the header is a navigation menu with icons for various services: Food, Cash & Medical; Housing Assistance; Office Locator; Child Support; Vocational Rehabilitation; Adult Care; Mental Health & Addiction Services; and Disability Support. A red banner below the menu contains an alert about COVID-19. At the bottom, there are sections for 'What's New', 'How Do I ...?', and 'Staff & Media'. The left sidebar contains a menu icon, an office locator icon, a report abuse icon, and social media icons for Facebook, Twitter, and YouTube.

Align your strategy with others

Discover
Plan
Align
Use
Govern

Make sure your plan fits with

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



Coordinate strategies to serve your users

Make sure you

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

Work with other strategists to

- help people know about the content
- get people to the content
- find out how usable the current content is
- plan to find out how usable new content is

Use your strategy to improve your content

Discover

Plan

Align

Use

Govern

- Inventory the content
- Audit the content
- Hire and train writers, editors
- Set and follow an editorial calendar
- Write, edit, design, publish

Govern the content moving forward

Discover
Plan
Align
Use
Govern

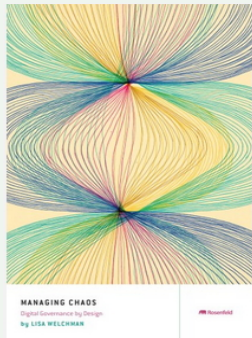
Who is in charge?

Who decides when issues arise?

How will you keep the content current?

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

How will you keep the strategy current?



Managing Chaos
Welchman, 2015

See also:

<https://www.usability.gov/what-and-why/content-strategy.html>

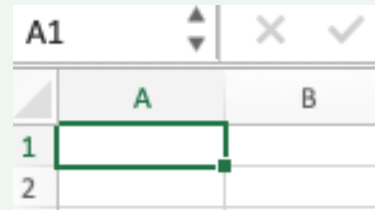
An example of strategy driving tactics: gov.UK

- Problems:** Too many websites with too many pages.
People need several sites to complete one task.
- Scope:** All UK government websites
- Discovery:** Websites with content not relevant to government
- Strategy decision:** "Government should only do what only government can do." We publish content only if users need it.
(email from Sarah Richards to Ginny Redish, 11/4/19)
- Success:** 116,000 pages deleted
<https://www.slideshare.net/SarahRichards2/confab-us> (Slide 27)

Using the strategy – tips on tactics

- Inventory the content
- Audit the content
- Hire and train writers, editors
- Set and follow an editorial calendar
- Write, edit, design, publish

Inventory the content



	A	B
1		
2		

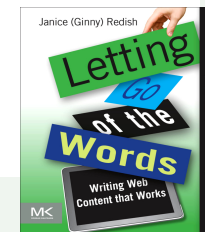
1. Inventory the current content

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

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

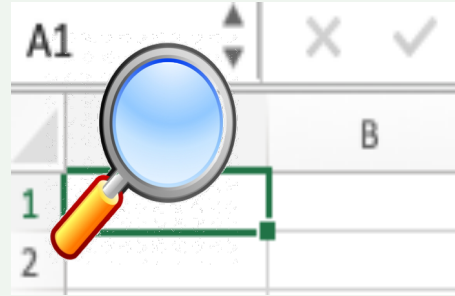
Columns to use for inventory

- URL or similar columns
- page title for letters, notices, or whatever
- short description you are inventorying
- URLs that link to this page
- URLs of links from this page
- date created (if known)
- date last updated (if known)
- current owner (person or part of the organization)



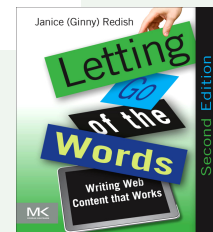
page 42

Audit the content



Columns to use for auditing

- fate (delete, move, combine, separate, edit)
- importance (high, middle, low – to set priorities for dealing with its fate)
- comments related to fate and importance
- person responsible for making changes
- (possibly more columns related to "who" for owner, writer, editor)
- due date for changes
- status (not started, in process, in review, published – or whatever stages you have set for the writing / editing / reviewing / publishing process)



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Tip 1 for auditing – usability testing

Include usability testing in your content strategy.



Photos from iStock.com, licensed to Ginny Redish

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

Caroline Jarrett and Ginny Redish,
How to test the usability of documents (3 techniques)
UXmatters, May 4, 2020

<https://www.uxmatters.com/mt/archives/2020/05/how-to-test-the-usability-of-documents.php>

Tip 2 for auditing – purpose, persona, conversation

Use this 4-step process:

1. **Answer:** What's the **purpose** of this content?
2. **Answer:** Who is the **persona** for this content?
3. **Walk the persona through the conversation** that the persona wants to have on the topic of this content
4. **Use the purpose, persona, and conversation** to analyze the content and decide what to do with it

Step 1: What's the purpose?

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

My communication will be successful if

[these people] _____

[do this] _____.

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

Step 2: Who is the content for?

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

Morgan a Member of the Public

Members of the public are
Individuals living in and around the County
Commuters
Students
Teachers
Website visitors speak English, Spanish and a variety of other languages.

Motivations
I do everyday things

- Use public transit
- Find a job
- Stay in compliance with county laws and regulations
- If I encounter a problem, I need to connect with the County for help.

The information is all there, but finding it isn't enjoyable...it looks pretty dated.

I don't want to have to read a lot of text to find out that I have to navigate to another place. Make it more user-friendly.

It's cumbersome to search unless you know the exact name of the department.

I am a first time junor. I am looking for information about what I need to do.

Help me find the information I need quickly.

About me

First visit: Monthly

Age: 18 - 60+

Education: High school, College, Post grad

Tasks

- Get transit information
- Access court & legal information
- Find health information
- Get natural resources information
- Manage property (for property owners)
- Stay informed

Information needs

- Low learning curve
- User-centered, not organization-centered
- Broad range of questions; must access everything from Preventing beg bugs to What is the County doing to improve the County?

Live outside
Live in County
~87%

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

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

[Name] _____
Job or position, representing what group _____

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

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

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

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

Creating an assumptive persona



[Name] _____

Job or position, representing what group

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

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

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

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

Step 3: Walk your persona through the conversation

Be the persona.

Talk through your experience and reactions – as the persona.

- What is your day like today?
- How did you get (or get to) this content?
- Do you read it right away? (If not, what do you do with it?)
- Do you read all of it?
- What part of it do you go to first?
- How do you react to it?
- Does it answer your questions?
- Are any sentences or words unclear to you?
- What are you going to do now?

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

- How well does the current version meet the **organization's goals** and the **user's needs**? (How well does it serve **your content strategy**?)
- Should you keep it, remove it, change it?
- How should you change it? What would make it better?
 - Different content?
 - Better title?
 - Different organization?
 - More headings? Different headings?
 - Better writing? Shorter pieces? Less jargon?
 - Different layout?

Thank you

Your turn:

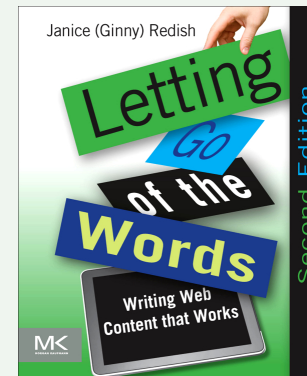
Question?

Comment?

Favorite example – good or poor?

Write to me:

ginny@redish.net or
ginny.redish@gmail.com



[2nd edition](#)
[Elsevier, 2012](#)