CONTENT STRATEGY TEMPLATE 2 ASSESSING csd-ase-tmpl2-01 MARCH 2015



**Content Strategy Document**

***The Content Strategy Document – Short Version (optional)***

 *Two (2) to five (5) pages: A concise project summary, which may be a collaboration of the Project Management Team and the Content Strategist, and approved by the team****.***

***Cover page:***

* Title and date of project
* Project Owner
* Document Author(s)
* Project team members and roles

***Project overview:***

*One (1) page: articulates the context under which the project was initiated; may be completed by the Project Owner, Project Manager or the Content Strategist****.***

* Why was the project undertaken?
* Project scope
* What are the project goals?
* Did the project successfully meet its goals?
	+ List goals met and explain how
	+ List unmet goals; explain reasons why and recommended next steps
* Summary statement of the content ecosystem at project completion
* Acknowledgements: List team members and roles

Description of the “Content Ecosystem Current State”

* The Enterprise
	+ Business Model
	+ Operating Environment
	+ Trends
	+ Challenges, Pain Points & Opportunities
* Competitive Analysis
	+ What are competitors doing well?
	+ What are they failing at?
	+ New opportunities for client
* Content Ecosystem
	+ What’s working
	+ What’s not working
	+ What’s missing
* Content Life Cycle
	+ What’s working
	+ What’s not working
	+ What’s missing
* Quantitative Summary of the Content Inventory
	+ Websites
	+ Microsites
	+ Pages
	+ All digital assets
		- Formats and types
* Summary of Content Assessment/Audit
	+ Findability
	+ Usability
	+ Relevance
	+ Ownership
	+ Up to date or outdated
	+ Messaging
	+ Brand alignment
	+ Editorial & production quality
* User Engagement
	+ Target Audiences: whom are we talking to?
		- Customers
		- Internal audiences
		- External audiences
	+ Editorial summary
		- Tone and voice
	+ How and where are we engaging audience groups?
		- Channels
		- Platforms
		- Formats (text, image, rich media, etc.)
		- Content Types (Articles, White papers, PDFs, User Manuals, etc.)
		- Marketing & Sales (path to purchase, sales funnel management)
	+ UX design
		- Design Elements (aesthetics)
		- Error messaging
		- Forms
	+ Optimization
		- SEO
		- Taxonomies
		- Metadata schema
		- Localization
		- Personalization
	+ Metrics we use to analyze success
* Management
	+ Day-to-day content life cycle operations
	+ Content calendar
	+ CMS Management & Workflows
	+ Compliance
	+ Governance Oversight & Policy Development
* Conclusions
	+ Overall success of the project
	+ Challenges encountered and overcome
	+ Areas for improvement
	+ Summary description of “The Future Content Ecosystem”

***The Content Strategy Document – Long Version***

*The headings and subheadings of the final document long version detail the specifics of: the Current Content Ecosystem, the intended Ecosystem Future State and the Content Strategy(ies) to be employed to achieve the future state. All charts, screen shots, images, tables, templates, resources and estimated completion schedules or roadmaps should be included. The final Content Strategy Document will be a unique, purpose-built strategy for each situation and company. There is no one-size-fits-all strategy.*

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 ***The Content Ecosystem Current State:***

* The Operating Environment
* Enterprise Trends, Goals and Objectives
* Audience Trends, Goals and Objectives
* Content Strategy Framework
	+ Description of the current Content Ecosystem State
	+ Pain Points
	+ Challenges to be overcome
	+ New initiatives or trends to be addressed

***The Content Ecosystem Future State:***

* Findings of the Stakeholder Interviews
* Strategic Intent
* Motivation for change
* Goals and Objectives
* Description of the Content Ecosystem Future State
* Challenges to be overcome
* Medium- and long-term Content Future Vision

***Recommended Solutions and Strategies:***

These depend on the nature of the company and the project coupled with the findings and conclusions drawn from the discovery and assessment phases. Answering the following questions highlights the strategic implications, which need to be taken into account. The list is only illustrative and is by no means all inclusive. Note in some cases the same strategy may affect or inform more than one strategic design.

*Who are we talking to?*

* + Defining our audience; creating personas and profiles
	+ What are their information needs (problems to be solved, work performed etc.)
		- Content types
		- Content models
		- Content formats
		- Content relevance
		- Content mapping
		- User Experience design

*How do they search or find content?*

* + Information organization strategies
		- Taxonomies
		- Metadata
		- SEO strategies
		- Adaptive/intelligent content strategies
		- Exceptions and error messaging
		- Sitemaps

*Where and when do they want content?*

* + Channel strategies: multichannel, omnichannel, off-line integration
	+ Platform strategies: big screen and small screen devices & non-digital platforms (broadcast, print)
	+ P2P strategies
	+ Optimization Strategies
		- Localization/ translation
		- Personalization
		- SEO

*What content do we need, what do we want to say, what does our audience want to say or know?*

* + Organizational goals
	+ Messaging goals
		- Brand messaging
		- Upsell and cross sell
	+ Content mapping
	+ Content types
	+ User-Generated Content
	+ Editorial strategies
		- Content Calendars
		- Style guides

*How do we produce and deliver that content?*

* + Content life cycle strategies
		- Planning
		- Creating
		- Reviewing and Approving (Editorial Workflow)
		- Assembling
		- Publishing and Distributing
		- Archiving

*How do we maintain consistently good content that meets audience and organizational goals?*

* + Governance Model
	+ Federated, Central, Hybrid
	+ Governance committee
	+ Staffing plan
	+ RACI Matrix
	+ Medium- and Long-term Roadmap