CONTENT STRATEGY ROADMAP

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UNIVERSITY OF NORTH TEXAS TECM 5200: Digital Content Strategies

INTRODUCTION

THE CLIENT

This semester, I worked with a small team to audit content related to our client's software. The client provides content to allow users to help themselves when experiencing issues with the software, therefore deflecting customers from support and saving company resources.

THE CONTENT

The content we audited included references, help guides, and general information for users of the client's software. The audience of the content would typically consist of highly skilled professionals in our client's industry. My team was tasked with auditing 35 articles and rating each one based on criteria that we defined.

CONTENT AUDIT METHODS

After reviewing our client's instructions and looking through their Content Design guide, my team decided to audit the content for two criteria: clarity and accessibility, each having three sub-criteria for more specific analysis. Generally, we found most strengths to be in the content's clarity and, we found most concerns to be in the content's accessibility.

In terms of clarity, we audited for:

- Accurate and descriptive headings
- Appropriate language for target audience
- Accurately descriptive and active links

In terms of accessibility, we audited for:

- Practicality of alternative text for images
- Practicality of screen reader assistive technologies
- Presence of directional language

My team decided that in order to improve the user's experience with help guides, our client should maintain the clarity of the content, create useful alternative text for images, and remove directional language from articles. In this report, I'll provide my SWOT analysis and explain the strategic directions and tactics I recommend the client adopt based on the maturity level of their content operations.

SWOT ANALYSIS

STRENGTHS

Based on meetings with the client, it appears that their company has fairly strong content teams that continuously perform content audits, which is a major strength. From my understanding, there's a team that works to audit the content, identifying any issues that arise, and then there's a team that fixes those issues and writes new content.

It seems like a major strength to the company's content operations is that they're already paying attention to their content. In addition to their content teams, they've developed a Content Design guide that is a useful tool for the content teams to reference when auditing and creating content. Using the Content Design guide, an employee can assess old content and create new content without using more company resources, such as extensive peer reviews and edits before publishing.

Additionally, when content is created using the rules from the design guide, new content is of a higher quality, as it adheres to company standards. Therefore, there is less content that is flagged during the audit and less content to edit, further saving company resources.

WEAKNESSES

In general, the major weakness in the client's content operations is the lack of cross-team collaboration. The client mentioned on a few occasions that the teams at their company are fairly siloed, meaning that the software teams, UX teams, and content teams don't often communicate with each other unless individual team members first take the initiative to open a line of communication.

This lack of cross-team collaboration often results in content being outdated, as it hasn't been updated to reflect software changes. When help guides aren't accurate, customers are unable to help themselves with software issues. Therefore, they use company resources by calling customer support. In a later section, I'll expand more on this issue.

OPPORTUNITIES

A major trend in the tech world that the client could take advantage of is AI. The client writes help guides to deflect customers away from customer support, but if they had chatbots available for customers to use within individual articles, customers may be less likely to call customer support for help. Further, having users communicate with an AI chatbot will give the company the opportunity to atautomatically collect data about problem areas within articles. Training the AI to not only help the customer but also identify where the problems are within the articles will generally help reduce the time that it takes to audit the content. With the company's Content Design guide already outlining the content rules, AI can be easily trained to flag content that confuses customers and reduce the time that the average content audit takes.

Capitalizing on AI is integral to staying relevant in the current business landscape, and with time, an AI tool can improve the company's content operations.

THREATS

Just as AI is an opportunity the client should capitalize on, it's also a threat if it's used more effectively by competitors. As I stated previously, AI can help to automate some of the customer support experience and data collection process when it comes to customer interactions with the content. Further, the client's industry regulations change frequently, meaning that software and general content needs to be updated to reflect these changes. If competitors are using AI to flag when these changes need to be made and the client is relying solely on manual audits, the company will be behind in their business ecosystem.

If competitors apply AI to their business model, making it easier and faster for users to use their product and engage with their content, the client could lose customers. AI will revolutionize the business world, and if the company doesn't join in, they run the risk of becoming outdated and inefficient compared to their competitors.

STRATEGIC DIRECTIONS AND TACTICS

To assess the maturity level of my client's content, I used JoAnn Hackos' "Information Process Maturity Model," which defines five levels of maturity (Hackos, 2017). Based on Hackos' model, **I would place the client at a level 3 for content maturity**, meaning the company is "organized and repeatable" (Hackos, 2017).

Level 3 is referred to as the "base level that conforms to well-established business practices" (Hackos, 2017). Basically, the company has good processes in place for content creation and assessment, but they could adopt more processes to streamline their content strategy and advance their content maturity.

The client's company has a several different content teams that develop and assess content. Based on what the client has shared in meetings, I can tell that the content team is making efforts to strengthen content quality and decrease expenses, mainly in customer support costs.

It seems like within the content teams, there are already quality assurance processes in place. There's a specific design guide that outlines the quality expected from company content, and there are content teams within the organization who frequently audit the content.

Even though they have good quality assurance practices in place within the content teams, there could be increased collaboration between teams to ensure everyone—including software developers, UX designers, and content designers—are all working harmoniously and therefore efficiently, increasing cross-team collaboration through increased planning.

The main strategic directions the client should take to further advance their maturity level include:

- Increasing cross-team **collaboration**
- Implementing cross-team **planning + estimating, scheduling, and tracking**
- Developing surveys to increase **user focus**

COLLABORATION

In a few meetings, the client implied that there is a lack of cross-team collaboration when it comes to content design at their company. Specifically, it seems like there aren't processes in place that require the collaboration between UX teams and content teams. In one meeting, the client stated that teams are "siloed," meaning that it isn't common for teams outside of the same umbrella (content, software, or UX, for example) to communicate with each other, at least from the perspective of the content designers.

JoAnn Hackos states in her "Information Process Maturity Model" that "a mature collaborative organization works as a team throughout the information-development life cycle, including planning, design, development, publishing, and evaluation" (Hackos, 2017). From what the client has stated, it seems like the content teams frequently collaborate with each other, but individual content designers must take initiative to reach out to other teams, such as the UX team, to get information related to new changes in the software.

If the content designer doesn't take initiative to reach out to other teams, it isn't uncommon for the UI of the software to be updated without the content teams being made aware of the changes. The client states that there have been times in which the software's UI has been changed and the content team doesn't find out until the change is implemented, leading to an increase in customer support calls because user guides don't match the software's UI.

The UX team must reach out to software teams to implement new changes, so why don't they reach out to content teams as well? **Implementing a content planning calendar** that several teams can access will increase cross-team collaboration, ensuring that content designers don't have to rely on word-of-mouth to hear about new UI changes. A calendar will also help the content team plan, estimate, schedule, and track their deliverables, which I'll explain in the next section.

PLANNING + ESTIMATING, SCHEDULING, AND TRACKING

I've discussed that increasing cross-team collaboration at my client's company is a strategy that can help the content teams stay proactive, and I believe that implementing a strategy for planning, estimating, scheduling, and tracking goes hand-in-hand with collaboration. As I previously stated, implementing a **content planning calendar** will help teams collaborate, and that includes giving the content design team access to the plans that other teams are working on.

From what I've gathered in client meetings, it seems like some of the work that the content designers are involved in include long-term projects. The other half of work is involved in fixing problems flagged by subject matter experts (SMEs), who regularly audit content for issues. However, as I previously stated, there are instances in which software/UI changes are made without being communicated to the content teams.

We can't separate the planning process from the topic of collaboration within this organization. In order for the content designers to have the ability to plan their workload, there needs to be increased collaboration with other teams. Content designers have their own tasks to work on. When there's a sudden UI change that must be addressed in content guides, content designers are forced to put the rest of their work on hold while they update the content. The lack of planning and collaboration uses valuable resources and increases expenses, as customers will increasingly reach out to support until the discrepancies are resolved, and content designers will be forced to neglect work in their current sprint to accommodate an increased workload.

In the short term, there will have to be more meetings to discuss how to appropriately implement a content planning calendar, but after the calendar is up and running, the process should be fairly automated. UX designers will put pending changes and plans on the calendar and software developers will communicate when the changes will go into effect. Giving content designers access to a cross-team calendar will enable them to see when changes will be made in the UI, enabling them to be proactive and schedule changes to the content guides.

By using a cross-team content planning calendar, the client will increase collaboration and enable content teams to more accurately plan, track, and schedule their work. This change will ensure all content is accurate, reducing the number of customers who reach out to customer support, therefore reducing expenses and increasing revenue in the long run.

USER FOCUS

The last strategy that I propose the client implement is increasing user focus, specifically by **developing surveys** for customers to provide feedback. The client specifies that in his content team, there's a community manager, who sometimes reaches out to customers to get direct feedback, which they call "follow me homes." I wasn't able to get much more detail on what the "follow me homes" involve, and we weren't given any customer data as a part of our content audit, but I haven't seen or heard anything relating to customer surveys.

There's an option within each help article to sign in to receive personalized help, but the user must be logged into their company account. Even then, the user must leave the help article and go into their profile page to leave feedback, implying that there are limited ways for customers to leave feedback on individual articles without using customer support resources.

In individual articles, customers can only leave specific feedback if they click "Something else" after marking the content as unhelpful, as that is the only way a text box opens up for input. Even so, the input is hidden behind the thumbs up or thumbs down feature of the article. There is no immediate indication that customers can leave specific feedback for each article unless the customer really looks for it.

In a group of users, there's a wide variety of customers. Customer 1 might rather search the internet for a solution that the help articles don't resolve rather than call customer support. However, customer 2 might always reach out when they have an issue with a help article. Allowing customer 1 to leave specific feedback on individual articles might allow the content teams to resolve issues before customer 2 needs help, fixing the problem and reducing customer support calls.

Using more detailed surveys can automate part of the customer support process and allow for more specific feedback from a wide variety of customers, allow the content team to focus on specific aspects of specific articles, increasing the overall content maturity.

CONCLUSION

Without having full access to the content teams and processes, my recommendations are fairly limited. For example, I didn't have access to much "behind the scenes" processes beyond what was provided by the client and my team's content inventory. Additionally, I don't have data about the organizational structure beyond the content teams, and I don't have information about how the company hires or trains their employees. My recommendations are made with these limitations in mind.

Without further information, I'm placing the company at level 3 in the content maturity model, but it is possible that with a strong organizational structure, user focus, and collaboration, they could be at a level 4. Initially, I went back and forth between the two levels trying to clearly decide which one to pick. However, I don't know enough of the specifics to rate them at a level 4, so based off of the data that I have access to, the company is at level 3.

To increase their content maturity, I recommend:

- Increasing cross-team **collaboration**
- Implementing cross-team **planning + estimating, scheduling, and tracking**
- Developing surveys to increase **user focus**

When implementing these strategies and tactics, employees will have to be trained in new technologies and software—such as a content planning calendar—which will use resources up front. However, in the long run, this investment will pay off by increasing the efficiency of the company's content operations.

Although the company currently has great quality assurance practices, these changes will allow their content design team to be more proactive, planning their workload in advance and adjusting content before it's a necessity. A complete overhaul of their content isn't necessary. Applying the tactics in these three simple strategies will, in the long run, mature their content operations and help the company decrease expenses and increase revenue.

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