Understanding content strategy as a specialized form of management consulting

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Abstract

Purpose: The goal of this article is to position content strategy as a specialized subdiscipline of management consulting. Standard management consulting practices, such as gap analysis and needs analysis, are the foundation of content strategy practices.

Method: This article draws from the theory on management consulting and shows how management consulting principles work in the context of content strategy projects.

Results: Practitioners in the burgeoning field of content strategy will develop a better sense of how their work aligns with overall management consulting practices.

Conclusion: Management consulting already has best practices and methodologies. Content strategy builds upon that foundation to establish a professional discipline.

Practitioner's takeaway

- Content strategy is still being defined by practitioners, and management consulting principles offer a foundation on which the industry can build the specialized profession of content strategy.

- Content strategy is fundamentally the practice of solving business problems through the use of information.

- Content strategists must align their work with their organization's critical business problems.

An overview of management consulting

Management consulting is a "professional service that helps managers to analyze and solve practical problems faced by their organizations, improve organizational performance, learn from the experience of other managers and organizations, and seize new business opportunities."[1] Management consultants help their clients with "important issues such as handling complexity, achieving sustainable organizational growth, innovating, achieving change and enhancing productivity."[2]

A management consulting project typically has several phases, which include the following:

- Needs analysis
- Gap analysis
- Solution recommendation
- Solution implementation

Needs analysis

In the needs analysis phase, the consultant collaborates with the client to "identify the changes to an organization that are required for it to achieve strategic goals."

For the needs analysis, consultants rely on several methods to collect information, including:

- Examining existing records: files, reports, and publications
- Observing group processes, such as staff meetings
- Distributing questionnaires
- Interviewing those working within and affected by the processes under review[1]

A solid needs analysis is critical; otherwise, the organization may find itself solving the wrong problem. For example, if the strategic goal is to increase market share for a specific product in India, the needs analysis must first identify what factors would influence market share in India and then determine which of those factors to focus on.

Gap analysis

Needs analysis and gap analysis are closely related, but where the needs analysis focuses on the requirements, the gap analysis focuses on the difference between the desired state and the current state (the gap).

Rouse (2014)[4] describes three approaches for gap analysis:

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[1] Kubr, M. (Ed.). (2002). *Management consulting: A guide to the profession.* Geneva: International Labour Office.

[2] ISO. (2017). *Guidelines for management consultancy services* (Standard No. 20700). Retrieved from https://www.iso.org/obp/ui/#iso:std:iso:20700:ed-1:v1:en

[3] Business Needs Analysis. (n.d.) In *The local government & municipal knowledge base.* Retrieved from http://www.lgam.info/business-needs-analysis

[4] Rouse, M. (2014). Gap analysis. Retrieved from https://searchcio.techtarget.com/definition/gap-analysis

- McKinsey 7S Framework: Named for the McKinsey & Co. consulting firm, this approach relies on analysis of seven aspects:

  - Strategy

  - Structure

  - Systems

  - Staff

  - Style

  - Skills

  - Shared values

  The consultant determines the current and future states for each of the preceding items to find the gaps.

- Nadler-Tushman model: Named for Columbia University professors David Nadler and Michael Tushman, this gap analysis model divides business processes into three groups:

  - Input: resources used, operational environment, and company culture

  - Transformation: systems currently in place that convert input into output

  - Output: can occur at system, group, or individual level

  When inputs or transformational processes are not adequate, gaps occur within those processes and in the outputs generated.

- Strengths, weaknesses, opportunities, and threats (SWOT) analysis: In this model, the consultant and client identify factors in the four SWOT categories. With those factors defined, the consultant and client can develop the best solution that plays to the company's strengths while avoiding threats.[4]

From the needs analysis and the gap analysis, the consultant develops a list of requirements and then a proposed solution to the identified problem.[5]

For example, the needs analysis might find that product pricing is a key factor for success in the target market, and the gap analysis might state that the organization currently uses a single global pricing strategy but should instead analyze individual markets to determine prices.

Solution recommendation

The proposed solution puts the overall problem analysis in context and should match up to the identified requirements. The consultant should consider several factors in determining the best solution, including:

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[5] Gap analysis. (2018). In J. Ball (Ed.), ProjectMangement.com techniques wiki. Retrieved from https://www.projectmanagement.com/wikis/233055/Gap-Analysis

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- What should the solution achieve?

- How will the new process be different from the current one?

- Will the effects of the solution last?

- What are the potential difficulties?

- Who will be affected by the solution?

- When is the best time to implement changes?[1]

In some cases, organizational constraints may require a solution that only addresses some of the identified requirements. For example, the best technical solution might also be the most expensive option; however, a solution that addresses 80% of the requirements at 20% of the cost is also available. The organization may choose the less expensive solution due to budget constraints.

The solution recommendation should include a project plan with resources and timelines, a mapping to identified requirements, and a budget.

Solution implementation

Implementing the solution is the culmination of the preceding project phases: "If there is no implementation, the consulting process cannot be regarded as completed".[1]

Should the management consultants who recommended the solution have a role in the implementation work? Kubr and his contributors (2002) argue that the consultants "prefer to be associated with the implementation of changes that they have helped to identify and plan".[1] Others argue that a key characteristic of management consulting is that "consultants are external to the problem that is being addressed, with no implementation responsibilities".[6]

No more than 30% to 50% of consulting engagements include implementation work.[1] Viewing the recommendation phase as the end of a consultant's involvement reflects a common misconception about management consulting in general:

> Consultants do not have to achieve more than getting their reports and proposals accepted by the clients. Some clients choose [no consultant involvement in implementation] because they do not really understand that even an excellent report cannot provide a guarantee that a new scheme will actually work or that the promised results will be attained.[1]

Ideally, the involvement of the team that defined the solution provides continuity in the solution implementation phase. The consulting team can also augment skills of the organization's staff.

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6 Srinivasan, R. (2014, December). The management consulting industry: Growth of consulting services in India: Panel discussion. *IIMB Management Review*, 26(4), 257–270. https://doi.org/10.1016/j.iimb.2014.09.001

An overview of content strategy

Content strategy is a subdiscipline of management consulting. Like management consultants, content strategists begin by identifying business problems. The key difference is that content strategists focus on business problems that the organization can solve with content.

Typical content strategy challenges include the following:

- New business requirements are impossible to support in the current content development pipeline, so reengineering is required (analogous to business process reengineering).

- The business requires the content workflow to scale for multiple delivery formats and multiple languages.

- Enhanced productivity. The business needs efficiency, so the content workflow must eliminate artisanal, time-consuming content production processes and replace them with repeatable, scalable processes.

- Buyers can mix and match products, which creates a huge number of possible product configurations. The content strategy must make it possible to mix and match content in similar ways to produce publications that match the custom product configuration.

- Global business requirements include different languages, localization, and internationalization. The content pipeline must provide support for all of these global requirements.

- Corporate brand positioning requires specific messages and content themes.

- Strategic business goals introduce new requirements for content systems. Strategists must design and build content systems that support the identified goals.

Bailie and Urbina (2013) provide the connection from these content requirements to content strategy:

> Publishing now requires a level of planning that addresses, in a holistic way, technical and business requirements along with editorial, social, and process requirements. This is called "content strategy," a comprehensive process that builds a framework to create, manage, deliver, share, and archive or renew content in reliable ways. It's a way of managing content throughout the entire lifecycle.[7]

Unfortunately, the popular definition of content strategy has largely degenerated into "how to do content marketing." The #contentstrategy hashtag on Twitter is filled with discussions of copywriting strategies, marketing tactics, and the like. But many experts see content strategy differently. In addition to Bailie and Urbina's (2013) preceding definition, Halvorson defines content strategy as "planning for the creation, publication, and governance of useful, usable content."[8] Her list of content strategy components includes content purpose, gap analysis,

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[7] Bailie, R. A., & Urbina, N. (2013). *Content strategy: connecting the dots between business, brand, and benefits.* Laguna Hills, CA: XML Press.

[8] Halvorson, K. (2008, December 16). The discipline of content strategy. *A list apart*, 274. Retrieved from http://alistapart.com/article/thedisciplineofcontentstrategy

metadata, and implications of strategic recommendations. Others have created a variety of definitions:

- "'Content strategy is to copywriting as information architecture is to design.' Rachel Lovinger."[9]

- "'Planning for the creation, aggregation, delivery, and useful governance of useful, usable, and appropriate content in an experience.' Margot Bloomstein."[9]

- "'Content strategy encompasses the discovery, ideation, implementation and maintenance of all types of digital content—links, tags, metadata, video, whatever.' Robert Stribley."[9]

Content marketing is a tactical facet of a larger content strategy that "focuse(s) on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience—and, ultimately, to drive profitable customer action,"[10] but it should not be mistaken for the strategy itself.

The steps in the content strategy process align with those in management consulting: needs analysis, gap analysis, solution recommendation, and solution implementation.

Content strategy needs analysis

During the needs analysis, the content strategist interviews stakeholders. At a minimum, this group includes representatives of content creators, product management, engineering, information technology, and executive management.[11]

By interviewing a solid cross-section of stakeholders across the organization, the content strategist can identify and prioritize the drivers for change, requirements, and success metrics for the content strategy. Critically, the content strategist must keep an open mind during the needs analysis and not begin to focus in on possible solutions at this stage. In addition to interviews, the needs analysis should include an assessment of existing content. The content strategist conducts a content inventory to produce list of all existing content. Then the strategist follows up with a content audit to measure the quality of the content. The appropriate metrics for a content audit will vary depending on the type of content being assessed. Rockley and Cooper (2012) recommend asking these questions to determine content quality:

- Is the content appropriate for customers?

- Does it use customers' terminology?

- Is the content well written?

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9 Bussolati, M. (n.d.) 10 definitions of content strategy. Retrieved from https://bussolati.com/contentstrategy-definition/

10 Content Marketing Institute. (n.d.) What is content marketing? Retrieved from https://contentmarketinginstitute.com/what-is-content-marketing/
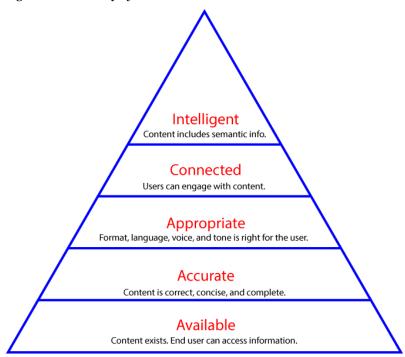
11 O'Keefe, S. (2013). Adapt or die: Managing increasing content velocity. Retrieved from https://www.scriptorium.com/2013/02/adapt-or-die-managing-increasing-content-velocity/

- Are the tone and level of detail correct?

- Does it meet customers' needs (for example, help a user complete a task)?[12]

O'Keefe (2014) defines a hierarchy of content needs to assess levels of content quality:

- Available: Information has been written and is published in a location accessible to the people who need it).

- Accurate: Information is technically correct and is well-written.

- Appropriate: Information uses a reading level that matches the target audience. The language and the delivery format are those needed by the target audience. The information is accessible to the target audience.

- Connected: The audience has the opportunity to engage with the content.

- Intelligent: Information can be personalized and filtered based on reader needs.[13]

Figure 1. Hierarchy of content needs

The content audit allows the content strategist to cross-check the information gathered in stakeholder interviews. The content strategist thus develops a solid understanding of the current state of content in the organization: "[A]ny project or initiative worth its salt begins with in-depth analysis of all relevant information and circumstances, which in turn leads to informed, achievable recommendations."[14]

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12 Rockley, A., & Cooper, C. (2012). Managing enterprise content: A unified content strategy. Berkeley, CA: New Riders.

13 O'Keefe, S. (2014). A hierarchy of content needs. Retrieved from https://www.scriptorium.com/2014/03/a-hierarchy-of-content-needs/

14 Halvorson, K. (2010). Content strategy for the web (p. 59). Berkeley, CA: New Riders.

During the needs analysis phase, the content strategist begins to explore how the organization needs to use content to achieve strategic goals. In the case of the earlier example of increasing market share in India, needs might include support for multiple local languages, delivery of content on mobile devices, and ensuring that content is appropriate for the target audience.

In this phase, Rockley and Cooper (2012) suggest examining these factors:

- Who needs and uses particular content

- How well the current content supports customers

- The current processes for how the content is created, managed, and delivered[12]

These other factors are also worth examining:

- Strategic changes in business focus (products, markets, or services)

- Stretch goals for the organization

- SWOT analysis that affects content decisions

The goal of the needs analysis phase is to paint a vivid picture of the current state and identify the drivers for change.

Content strategy gap analysis

A content strategy gap analysis uses a typical set of categories:

- People: Does the organization have the right people to address the needs identified? If not, what sorts of roles and skills are missing?

- Process: How do content processes need to change to support the identified needs?

- Tools: What tools and technologies would best support the identified needs? Are those tools in place already?

The results of a content strategy gap analysis may include the following:

- Roles and responsibilities

- Content quality gaps

- Content architecture and storage format

- Content management

- Content governance gaps

- Content delivery gaps

Roles and responsibilities

The content strategist develops a list of current staff roles and needed staff roles. For example, if the organization needs to begin localizing content for the first time, a localization manager may be needed. Moving toward structured content often requires an information architect role. The information architect determines the organization, labeling, navigation, and taxonomy for content.[12]

Conent quality gaps

The content quality gap analysis assesses the distance between the current quality of the content and the desired quality of the content. For example, if the organization is pursuing a content marketing strategy, then the content needs a voice and tone that match the strategy.

Content architecture and storage format

With overall content strategy requirements in place, the gap analysis can assess whether the current content format can deliver on those requirements. If, for example, the organization wants to improve content velocity—the speed at which information is moved through the content lifecycle—the content format can play a part. Other gaps in content architecture might include content metadata; some formats are better than others at encapsulating metadata. A common outcome of the gap analysis is a requirement to change the content authoring tools and technologies, because the legacy system cannot meet the new requirements.

Content management

Content management focuses on the systems and processes in place to manage content creation, storage, editing, review, and publication. How does the content development process support the content strategy? Is content controlled throughout the content lifecycle? Many organizations rely on personal communication rather than software systems to manage information flows. As content volume scales up, the manual approach becomes unsustainable and may be identified as a gap that needs to be closed.

Content governance gaps

The governance gaps address conformance to regulatory requirements, organizational quality standards, and risk management. How does the organization identify content that is obsolete or out of date? How are content updates handled? What is the review and approval cycle for content within the organization? Are legal and regulatory approvals well understood?

Content delivery gaps

Many content strategists focus only on Web content (Halvorson's classic book (2010) is entitled "Content Strategy for the Web"), but there are numerous options for delivery of content. The content strategist must determine which delivery options are best for the organization and how to ensure those options are provided. The content delivery gap analysis should include an assessment of delivery platforms—today, the default assumption is Web-based delivery, but there are other choices, including syndication options and physical media, such as CD-ROMs, flash drives, or even paper. The packaging of the content is also a concern. Options include Web content, print, podcasts and other audio, video, and more.

Finally, the content delivery gap analysis needs to look at the user experience with the content. That is, if the primary delivery is Web content, how is that content presented? How is the information organized? How can readers access the information? The gap analysis documents the difference between the current state of the content delivery and the desired state.

Content strategy solution recommendation

Content strategy solution recommendations vary depending on the scope of the problem being addressed. Typical components include recommendations for the following.

Content lifecycle

The content lifecycle describes how information is "conceptualized, planned, created, and maintained."[15] In a solution recommendation, the content strategist documents how content is created, edited, reviewed, approved, managed, delivered, maintained, and archived in a specific organization.

Content governance

Content governance documents the quality assurance process inside the content lifecycle. Governance "defines who is allowed to create, approve, and publish content. Governance also defines how those decisions are made on a daily basis.[7] The content governance solution may include legal or regulatory approvals, automated expiration of content beyond a certain age, and so on. Content that can affect health and safety typically requires more stringent governance. For example, medical devices, industrial equipment, and pharmaceuticals all have health and safety risks, and correct usage or application is critical. In contrast, video game companies focus their governance on delivering compelling content and reducing the risk of cultural missteps.

Content velocity

Content velocity refers to how quickly information needs to move through the content lifecycle and content governance issues.[11] Typically, software companies move faster than hardware companies. Commercial companies move faster than government agencies. Games, entertainment, and consumer electronics move faster than industrial applications. The content strategist must ensure that the recommendation meets the organization's content velocity requirements.

Content integration

No organization should produce content in a vacuum. For example, a product description likely draws from product specifications developed by a product management or engineering team. UX content (the text on a software or Web application interface) must be integrated with software code. Audio instructions or voice recognition interfaces connect with the product. The recommendation needs to address the integration of content with other business data.

Content architecture

A content model describes the allowed components of a piece of content. A journal article, for example, might require an abstract, an author byline, and a biography in addition to the article itself. The content model must be flexible enough to accommodate typical content variations, all delivery platforms, and all languages. At the same time, it is helpful to provide

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[15]   Content Strategy, Inc. (2017). Think of content as a living thing. Retrieved from http://www.contentstrategyinc.com/content-lifecycle/

some guidance to the authors by creating a proscriptive content model. The recommendation describes a content architecture that supports all identified types of content. The content architecture usually provides for multiple types of content and documents the required structure for each type.

Content delivery

The content delivery recommendation describes the formats in which information should be delivered. Delivery includes human-consumable formats (like Web pages, printed documents, and podcasts) but also provides for machine-consumable formats (like syndication information (RSS feeds), APIs (software interfaces), string files for use in software, and so on).

Localization

The localization recommendation describes all aspects of content localization—how content is tailored to specific language and cultural audiences. Components may include the following:

- Short-term and long-term strategy for localization support. How many languages are supported? How and when are languages added or removed from localization?

- Accounting for regional and cultural requirements. Are different units of measure required? What content conventions need to be included or avoided for a particular audience? What types of graphical content are needed?

- Content internationalization requirements. How should content labels (notes, warnings, etc.) be handled? How should varying formatting or layout requirements be handled?

- Mapping of content against recommended localization approach, such as human translation, machine translation, transcreation, or a combination of approaches

- Resource allocation, whether internal or external, to address localization requirements

- Localization workflow for each type of content that required translation

Tools and technologies

The tools and technologies section of the recommendation describes the software and systems needed to make the recommended content strategy a reality. Tools and technologies may include the following:

- Content management systems

- Authoring tools

- Grammar checkers and other editing support

- Review and approval workflows

- Publishing tools

- Conversion tools

- Content delivery systems

- Localization systems, such as a translation management system and a translation memory system

- Content integration tools, such as APIs or other ways to connect disparate systems

Business case

In addition to all of the content-related components, the content strategy recommendation usually includes a business case that provides the justification for the investment: "Building a business case requires you to quantify how an investment (in tools, technology, training, or anything else) will improve business results. It is not sufficient to claim that your content strategy will contribute to business goals; you must estimate the improvement and show that the results are worth the investment."[16]

Budget and roadmap

The recommendation provides a budget and roadmap for moving from the current state of the content to the recommended state. At a minimum, the budget includes the following:

- Software licenses

- Hardware needs or cloud computing requirements

- Installation and configuration

- Software customization

- Document conversion

- Training

Some organizations attempt to quantify lost productivity and other soft costs, along with additional resources needed to make the transition to the new content strategy.

The roadmap breaks down the tasks needed to complete the project, shows task dependencies, and provides the level of effort required for each task, along with the role or skill sets of the person who needs to perform each task.

Content strategy solution implementation

Like management consulting, the approach to implementation varies among content strategists. Some consultants offer both strategic assessments and implementation support; others focus only on delivering strategic advice. Management consulting is most often delivered by external consultants; content strategists are more likely to be part of an organization's staff. External content strategists are usually less involved in ongoing tactical work and have an easier time gaining the credibility and authority needed to push for significant change. Internal content strategists, however, have the advantage of understanding the inner workings of an organization, so they can push for incremental improvements over time. They can use their social capital inside the organizations to forge alliances and influence decisions.

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[16] O'Keefe, S., & Pringle, A. (2012a). Case studies. In *Content Strategy 101*. Retrieved from http://contentstrategy101.com/contents/developing/case-studies/

Internal content strategists often lead ongoing efforts to improve content. External consultants are more often brought in to work on a specific time-sensitive initiative. The rest of this section focuses on implementation of discrete content strategy projects.

Turning the recommendation into reality

Content strategy projects present a challenging combination of information technology (IT) and content issues. A successful project implementation must balance these two competing sets of priorities. For IT participants, the temptation is to focus on software—content management systems or API connectors. Content stakeholders instead want to discuss the end product—the appearance of a page on the organization's website. It is the content strategist's job to bring these two perspectives into alignment during the project.

The first step is to revisit the recommendation and the roadmap and begin to map those recommendations onto reality. Does the proposed schedule intersect with other major organizational deadlines? For example, it is a mistake to attempt a major change in content processes while simultaneously delivering for a product release. Where possible, the content strategy initiative needs to avoid overlap with existing content deadlines and responsibilities.

The budget is also subject to scrutiny. Is the organization willing and able to commit the funding needed to make the content strategy project happen?

Change management

Change management should be a top priority for the content strategy team. Content stakeholders tend to feel strongly about their existing tools, technologies, and workflows, and they rarely welcome changes. A careful change management program ensures that stakeholders know why the change is being made and have a chance to adapt to the new approach.

Resources

The project roadmap describes the resources needed to complete the project. The content strategist needs to ensure that the project has adequate resources, or plan for compromises on deliverables or due dates. Staff resources are better informed about the internal workings of the organization; external resources are able to focus on the project because they do not have to also complete their day-to-day responsibilities. Many projects use a combination of internal and external resources for the best results.

Table 1: Table 1. Summary of content strategy components and deliverables

	Management consulting or content strategy task	**Content strategy deliverables**
Needs analysis	Identify business problem to be solved	Connect business problem to content, Content inventory, Content audit, Current state of content, Drivers for change
Gap analysis	Difference between desired state and current state	Gaps in roles and responsibilities, Content quality gaps, Content architecture gaps, Content management gaps, Content governance gaps, Content delivery gaps
Solution recommendation	Propose a solution to the problem	Content strategy, Content lifecycle, Content governance, Content velocity, Content integration, Content architecture, Content delivery, Localization strategy, Tools and technologies, Business case, Budget and roadmap
Solution implementation	Build/implement the solution to the problem	Solution built and completed as specified in the solution recommendation

Conclusion

The principles of management consulting—a formal definition of the business problem to be solved and a methodology for developing a solution—provide a foundation for content strategy. Content strategists build on this foundation with content-specific techniques, such as content inventories, content audits, content architecture, and taxonomy development.

The practice of content strategy must balance between the strategic goals of the organization and focusing on content. Too much of a focus on content results in a content technician—someone who can build taxonomy or create new publishing workflows but who does not understand how those actions affect the rest of the business. Too much of a focus on strategic goals may result in a demand for a solution that is needlessly complex or cost-prohibitive.

Content strategy touches on numerous specialties and subspecialties. There is room for specialists that focus on localization, system implementation, information architecture, marketing content, product content, and more. At its core, however, content strategy is a specialized form of management consulting that seeks to solve business problems using a rigorous approach to the content lifecycle in the business.

About the authors

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Chief Executive Officer, founded Scriptorium Publishing to work at the intersection of content, technology, and publishing.

Today, she leads an organization known for expertise in solving business-critical content problems with a special focus on product and technical content. Sarah identifies and assesses new trends and their effects on the industry. Her analysis is widely followed on Scriptorium's blog and in other publications. As an experienced public speaker, she is in demand at conferences worldwide. In 2016, MindTouch named her as an "unparalleled" content strategy influencer. Sarah holds a BA from Duke University and is bilingual in English and German.

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Alan Pringle

Chief Operating Officer, solves content problems.

He partners with Scriptorium's clients to:

- Calculate return on investment to validate new approaches to content.

- Identify improvements to accelerate content's contributions to corporate goals.
- Evaluate tool vendors and select best-fit technologies.
- Address change resistance through constant project collaboration and targeted training.

Alan is the coauthor of several books, including *Content Strategy 101, The State of Structured Authoring*, and *Technical Writing 101*. He manages operations at Scriptorium and leads the LearningDITA.com team.

Alan earned a BA in English from Wake Forest University.

Bill Swallow

Director of Operations, specializes in global content strategy.

Bill partners with enterprise content owners to design and build content systems that solve complex information management and localization problems. Often, projects require centralizing and streamlining content development across multiple teams, departments, and regions. Bill expertly balances high-level business priorities with the specific needs of content contributors. Between 2010 and 2017, MindTouch identified Bill as a leading influencer in technical communication, content strategy, and content experience. Bill holds a BS in Communication from Rensselaer Polytechnic Institute.

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