The Scriptorium approach to content strategy

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SCRIPTORIUM

Executive summary

Scriptorium's approach to content strategy is based on management consulting principles. First, we identify business goals that are connected to content problems. We then do a needs analysis and gap analysis, and develop requirements. That work provides the foundation for a recommendation. From that recommendation, we build out the solution.

The key to success is the balance between content and strategy. It's easy to reduce the cost of the content lifecycle if you don't care about the quality of the content. If you focus only on the quality of the end result and not on the content creation process, you can end up with beautifully crafted content that's only usable in a single format, that's impossible to translate, or that takes entirely too long to create.

When you invest in content strategy, you are committing to a major digital transformation effort. The challenges are significant, but so is the opportunity.

Current state analysis

Nearly every organization produces content, but with varying degrees of content quality and process maturity. Our content strategy work begins with an assessment of the current state. Typically, we will do the following:

- Audit existing content.
- Document the content lifecycle.
- Inventory content-related software and tools.
- Interview content stakeholders.

Content audit

The purpose of a content audit is to understand the content landscape. We want to explore the following issues:

- *What types of information are available and in what formats?* In addition to a core product content group, an organization might have a training group that produces e-learning content and also printed training materials for instructor-led training. To understand what is being created and by whom, we look at a cross-sample of content types.
- *Is the information accurate and up-to-date?* We look for obvious technical errors or cases where the information in one document contradicts another. We ask the content creators about lag times and customer complaints. How do content development cycles affect product delivery? How are errors identified and corrected? What does the review and approval process look like?
- *Is the information appropriate for the target audience?* Does the target audience include a lot of people who are non-native speakers or people with limited reading proficiency? Those groups need simple, clear content with plenty of explanatory images. Videos and other visual content are especially helpful for this group. If the audience is subject matter experts, industry shorthand may be appropriate. We also ask some questions about

delivery formats. Is the organization delivering in the formats that the audience prefers? Is the information in the right language for the target audience?

- *Does the information connect the reader with additional resources?* Does a troubleshooting procedure list required parts, and are those parts easy to locate? Does a conceptual overview provide additional reading? Does a training overview point readers to the product content where they can find additional in-depth information?
- *Is there appropriate personalization?* Complex products may allow or even require customers to choose different feature sets. Based on a customer profile, you could deliver personalized content that includes only relevant features or that tailors the level of detail to the reader's experience level.
- *How many total pages of content does the organization have and in which languages?* A major multinational corporation may sell hundreds of products and manage more than 50,000 pages of content. Contrast that with a small software startup that needs 500 pages or less to describe a single product.

Content lifecycle

The content lifecycle is the process by which information is created, managed, reviewed, published, translated, and eventually deleted. Some organizations have documented processes for the content lifecycle; most organizations do not. But in every organization, there are unwritten assumptions and established ways of getting the job done.

To assess the content lifecycle, we look at the following factors:

- *Longevity.* When a piece of content is created, how long is it available? Does it expire or go out of date? If so, what triggers expiration?
- *Governance.* Who decides when content is ready for publication? Who decides when content should be deleted? How do you decide to create new content?
- *Process.* What processes does a piece of content go through from concept to publication to archiving? Do different types of content go through different processes? If so, what are the criteria that determine content categories?
- *Risk.* What makes content high risk or low risk? Can using this content affect anyone's health and safety? Are there legal or regulatory risks?

Software inventory

The software inventory focuses on the tools and technologies that your organization is using throughout the content lifecycle. Often, that means Word for authoring, and PDF for review and distribution. But even a straightforward Word-based content development environment probably includes supporting tools for graphics. We also look for connected software and systems. During the software inventory, we find a huge variety of systems, often including the following:

- Word processor and desktop publishing tools
- Help authoring tools

- Web development tools
- Content management systems
- Wikis
- Knowledge management systems
- Graphic software packages (for screen shots, CAD, and illustrations)
- Video, animation, and software simulation software
- Audio capture software
- E-learning software
- Learning management systems
- Learning content management systems
- Software code (with embedded comments and string files for software interface text)
- Database software (for parts lists and product specifications)
- Spreadsheets
- Source control systems
- Site generation systems
- Translation management systems
- Translation memory systems

Interviewing stakeholders

Every organization has content stakeholders. The most obvious stakeholders are the content creators and the content consumers, but there are many others who have some responsibility for content. We interview stakeholders to ferret out the undocumented assumptions about content. A typical list includes the following roles and functions:

- Content authors (in technical communication, marketing communication, training, technical support, and more)
- Content reviewers and approvers
- Product managers
- IT
- Technical support (often the biggest internal content consumer and also a likely content creator)
- Risk management
- Legal
- Safety

- Localization
- Field service and service technicians

Gap analysis

From the current state analysis, we can do a gap analysis. The gap analysis spells out the problems with the current state.

Typical gaps include content that:

- Doesn't match corporate branding, voice, and tone.
- Is not easily searchable.
- Takes many months to localize.
- Is out of date or technically inaccurate.
- Is not appropriate for the target audience.
- Is duplicated in many places.

The gap analysis describes the difference between the desired state and the current state. It is of course tempting to flesh out the gap analysis with solutions or requirements ("content is not easily searchable *because it is locked in huge PDF files*"), but we try to focus the gap analysis on the difference between the desired future state ("customers can easily find the information that they need") and the current state ("customers can't find the information that they need"). The gap analysis gives us an idea of the scope of the problems we need to solve. Multiple gaps might have the same root cause.

Needs analysis

During the needs analysis, we look at the identified gaps and describe how to change things to reach the desired state. For example:

- *Improve search:* need to deliver content in search-friendly HTML topics instead of a single PDF file
- *Speed up localization:* need to change the localization process to deliver localized content in 2–4 weeks rather than six months or more
- *Improve technical accuracy:* rework the content review and approval process

The outcome of the needs analysis is a set of high-level requirements, such as "ensure content is usable on multiple devices," "create a style guide so that writers create content with a unified voice," or "build an enterprise taxonomy."

Recommendation

When we recommend a content strategy solution to a customer, our goal is to find the best way to turn the requirements into reality. The challenge here is that, in addition to content requirements, we often have additional business requirements, such as limited funding, external regulatory requirements, or a focus on risk reduction. The size of the company, the type of content, and the company culture all play important parts in shaping the recommendation.

Our content strategy asssessments typically include the following components:

- Content model and information architecture.
- Reuse, localization, and conversion strategies.
- Software recommendations for authoring, reviewing, and delivering content.
- Business case, which provides a discussion of how the new strategy will improve business outcomes. The most common driver is cost reduction or cost avoidance, but we also look for opportunities to increase revenue and for more qualitative goals, like improved user experience or better alignment with brand positioning. We have to be able to justify the proposed investment—and the risk of making changes—by showing a significant return on investment to the business.
- Implementation overview, which provides a high-level project plan for the tasks that need to be completed to execute the recommended strategy along with an estimated cost.

Next steps

Are you ready to invest in content strategy for your business? Contact us to explore how we can help you align your content with your business strategy.

About the author

Sarah O'Keefe, 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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