# Content Strategy Roadmap

### Discovery

**Tasks:**

* Gather and review existing content and goals documentation – guidelines, policies, metrics, recommendations, member surveys, etc.
* On-site and virtual meetings, surveys, and other data-gathering activities as needed with stakeholders to review existing business processes, challenges, and goals

**Deliverable:** Document describing content goals

### Content audit and assessment

**Tasks:**

* Get the complete content inventory
* Assess content for quality, usability, task/goal suitability, structure
* Compare existing content against goals to identify gaps
* Document observations, findings, and recommendations
* Discuss observations, findings, and recommendations with content owners and review feedback and revisions

**Deliverables:** Content matrix, content findings and recommendations report, content owner discussions, feedback and revisions

### Comparative content analysis

**Tasks:**

* Identify appropriate comparison and competitive sites and organizations to audit
* Develop appropriate metrics to use
* Conduct the analysis

**Deliverables:** Comparative audit findings report

### Empathy-based audience personas and customer journey framework

**Tasks:**

Conduct two brainstorming workshops with staff to

* identify the highest-priority audience segments to serve online
* flesh out their personas with key contextual information about their challenges, fears, and hopes
* articulate the strategic opportunities for the organization to serve them

Validate personas and customer journeys through focus groups

* Recruit people to match the personas demographically
* Confirm whether the strategic opportunities identified in the journey workshop are consistent with participant behaviors, opinions, and drivers

**Deliverable:** Detailed descriptions of up to four personas

### Develop guidelines for content creation and publishing

**Tasks:**

* Identify appropriate editorial style guidelines
* Facilitate a message architecture workshop
* Identify the voice and tone that is appropriate for the brand and adapted effectively for each content source and channel
* Adapt publishing best practices to client’s content and channels

**Deliverable:** Content guidelines

### Identify roles, lifecycles, workflow, and governance models

**Tasks:**

* Define roles and governance structure
* Define content access-level strategy
* Define content success metrics and ongoing decision process

**Deliverables:** Document outlining all of the above

### Taxonomy

**Tasks:**

* Identify a prioritized set of metadata controlled vocabularies
* Develop and validate a content taxonomy as warranted by the assessment
* Identify tools to use for tagging content
* Identify roles for tagging content for migration and on an ongoing basis

**Deliverables:** Content taxonomy

### Plan for content transformation and migration

**Tasks:**

* Assess content for quality, usability, and task focus
* Assess content for migration
* Create content models/types

**Deliverables:** Content models, content transformation and migration schedule

### Plan for content marketing/promotions

**Tasks:**

* Create an editorial calendar based on topics, content volume, and promotion channels
* Create a communication plan for metrics

**Deliverables:** Editorial calendar, metrics communication plan

### Handoff, plan next steps

**Tasks:**

* Educate/remind client about each of the previous steps and deliverables
* Create a plan for ongoing education and follow-up

**Deliverables:**

Content strategy “playbook” document including all previous deliverables

Communication plan for content strategy education

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