

KEVIN P NICHOLS' CONTENT STRATEGY - CURRENT STATE
ANALYSIS AND STAKEHOLDER INTERVIEW PROTOCOL
(REVISED: 3 JAN 2015)

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Introduction and Instructions

Introduction

Over six years ago, I created the initial version of this protocol. Since that time, industry thought leaders and practitioners have hailed this work as one of the best and most comprehensive protocols of its kind. I have updated it several times over the years. This latest 2015 version represents the latest trends, issues, and concepts concerning content at this point in time.

To understand how and where such a protocol fits within a content project, see my comprehensive how-to guide for enterprise content strategy forwarded by Ann Rockley: [Managing Enterprise Content: A Project Guide](#).

Also, to understand how to leverage this protocol as part of a larger user experience effort, see [UX for Dummies](#) co-authored by Donald Chesnut and me.

Each of those books goes far beyond just providing 101 information; each provides intricate details on how to concept, design, and execute effective digital and interactive work.

I wish you success in all of your digital efforts. Feel free to download and use this protocol for free, but if it proves useful please leave a comment on my site about how it helped you achieve success. Thank you.

Instructions

Use this protocol to conduct stakeholder interviews to uncover current-state business processes, content scope, requirements and issues.

- Meet with each business unit within the organization to ascertain what kinds of content each user group or business unit handles. Press for the following: what the publication and production processes are, and any issues, gaps, or redundancies with their processes or content quality concerns.
- Interview authors, content contributors, and other members of each line of business who work with content daily. You should not use this entire protocol for one session. Rather, use each section to interview appropriate parties. For example, use the analytics section only to interview people who work with analytics or SEO.
- Span the organizational matrix, interviewing junior, mid-level and senior leaders. Meet with one person at a time, if possible. Also, have another team member such as a Project Manager capture all notes during the interview.
- In general, schedule two hours for each interview. Be sure to send the protocol before the meeting and list out any deliverables and/or examples you would like the interviewee to bring. Set up Web-share for meetings if you are remote so that the interviewee can show you file or CMS structures.

Protocol

Business and Project Strategy and Goals

- What are the key organizational or business drivers and goals we should consider?
- What are the key organizational business objectives we should consider? Are there measurements for these objectives? Who owns each objective?
- Why are you doing this work? (What is the strategic intent behind it?)
- What will constitute success in your mind?
- What are the long-term versus short-term issues and concerns you would like to address?
- From a business standpoint, what is the ideal solution or experience?
- Who is the audience or targeted consumers?
- Which constraints should we consider?
 - Are there budget considerations? Who controls or oversees the budgets for this work?
 - Is timing an issue and if so, what are the key target dates?
 - Are you open to technological changes, such as a new content management system, analytics tools or document management applications?
- What are the challenges across different stakeholders or lines of business we need to be aware of and are there conflicting interests at work? Are there political or cultural differences for which we should consider or be aware of while conducting this effort?
- Who are the key executive stakeholders and sponsors for this effort?
- Who are all of the stakeholders with whom we should consider for the effort? (E.g., which stakeholders should we interview?)



Content Inventory and Scope

- Do you have a list of all the different types of content that you work with? Is there a sitemap (for websites) or any information architecture work that we can leverage to determine the content types and scope?
- Have you performed any inventories or audits that we could leverage to determine the scope of the content we must consider?
- Do you use content inventories and auditing as an ongoing process (say semi-annual audits) to evaluate the ongoing efficacy of your content and its performance?
- Can you help us create a comprehensive list of content types that your organization works with (if the list is not pre-existing)?
- In terms of quantity and volume, how much content is there?
- What is the frequency and amount of content published (this can be to any and all properties being considered)?
- Will there be any content that will be decommissioned in the near future?
- Are there any legal or regulatory requirements that dictate the need for particular types of content?
- Do you have any editorial calendars or go-to-market calendars? How frequently do you update your calendars?
- Do you have any plans to create entirely new content (or leverage) pre-existing content beyond what is listed in your editorial calendar?
- How many new products are introduced annually and what is the content production effort for this?
- If we begin this project, what are the content-critical dates we need to consider? Do you have go-to-market campaigns, new product launches, etc. that will occur after we begin this project, but before we go-live? If so, will those elements need to be migrated into the new design?
- How many lines within your business or organization should we consider? For example, do you produce a lot of corporate content such as annual reports, executive blogs, corporate responsibility content, that should be considered in addition to other consumer-facing content?

Production and Publication Processes

- What are the major types of content in your organization? What are the unique content lifecycles associated with each?

Note: A preliminary high-level inventory is useful in framing this question as content lifecycles are often tied to content types (e.g., a warranty statement probably has a different workflow from content that populates a web banner that advertises a product).

- Define your content publication lifecycle. Is the content lifecycle documented by production process workflows? If you do not have one documented, what are the high-level steps? Are the sub-processes within the primary flow documented? Who are the owners, content creators, reviewers, and approvers with each process and what are the inputs and outputs of each?
- Use the following high-level workflow as an example to ensure you capture areas around each of the major components to the content lifecycle:

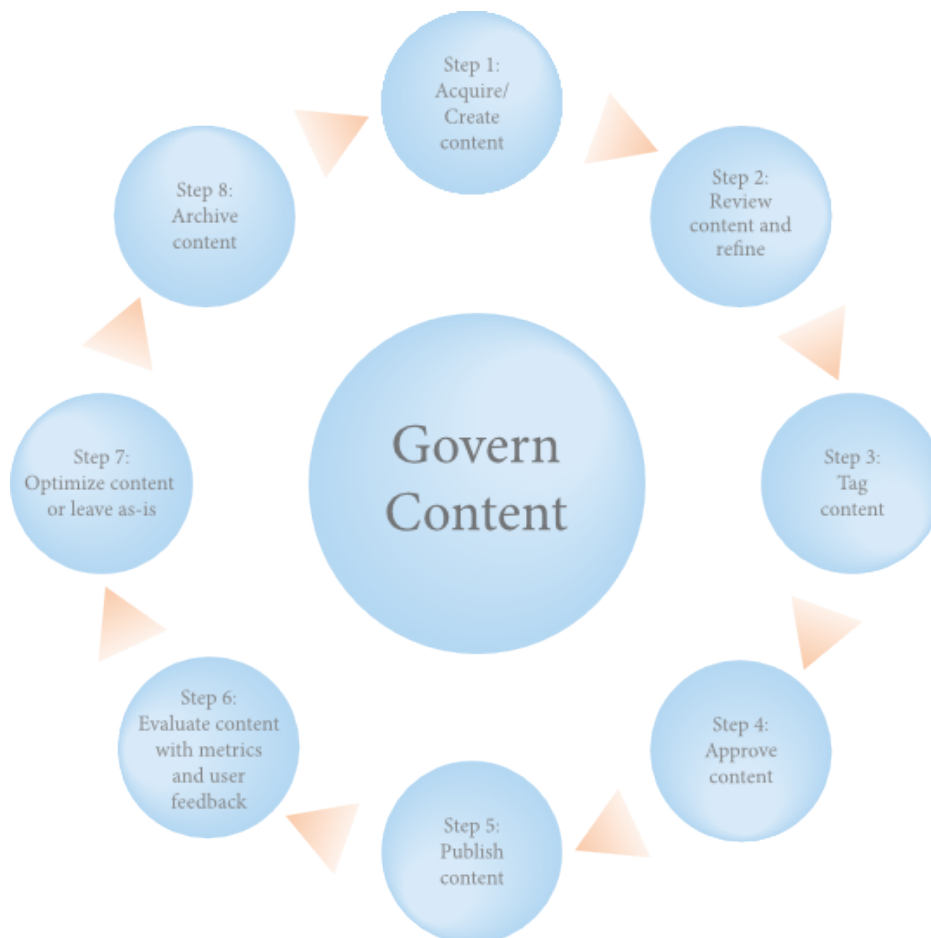


Image created by Karen L Machart; and repurposed from Kevin P Nichols' Enterprise Content Strategy: A Project Guide (XML Press, 2015).

- What aspects of content acquisition, production, or delivery perform successfully in your group? What aspects have issues? What are your greatest pain points?
- How do these kinds of content or processes add value to the organization? What does not add value?
- What are the larger issues that you face in terms of content acquisition, creation, management, production, delivery, and optimization?
- Who are the external stakeholders? Which internal stakeholders must we consider? Are there any vendors or third parties we should also consider? This is what we know of thus far (list them). What are we missing?
- What are the cultural and institutional influences we should consider? What are the organizational politics? Do certain business units own or control how information is treated? What are the primary drivers behind information control?
- Could you help us construct the production process model for each additional content type, such as marketing messaging content, product-related content, or customer support content? What are the specific issues that you face in terms of content acquisition, creation, management, production, delivery, and optimization?

Note: I keep internationalization/localization as a part of content production, but it will most definitely warrant a series of stakeholder interviews with each region or market. Since localization is a part of a larger content lifecycle, it is important to contextualize it within the larger model.

- Do you have a global presence? How many languages and countries should we consider for this work? Is any of your content localized? If so, what are your processes?
 - Do you start with one language and one content source and then translate from that source?
 - How do you ensure that the content is messaged adequately to each region?
 - Is the localization model decentralized?
 - What are the issues and choking points you encounter with localization?
 - If we provide you with a content inventory, can you help us determine which content is globally shared versus which content is differentiated per local market?
 - Do other regions know where and what they can differentiate? In other words, which content they must support from a global perspective and what they can or cannot do to the globally-shared content; what they can create on their own; and which standards they must uphold when creating new or localizing existing content?
 - Do you have a model that supports the following (and are the business rules for each scenario clearly understood and adopted):
 - Content that is distributed to regions where it can be localized;
 - Content that localities can create and share either globally or with other localities; and,
 - Content that is specific to a locale and note shared?



- Are there issues with how localities or regions treat content? Do they ever go off-brand or create their own content in any way?
- Is there unique content produced for local markets?
- Do locales have budgets to support the amount of content required?
- Do locales work with translation services and vendors and if so, are there any pain points within these processes?
- Do you experience issues in selling products or offering your services within certain markets?
- Is translation handled by third-party vendors, and if so, are they well versed in your brand, style, voice and tone guidelines? Do they include translation for metadata and taxonomy values? Do they understand writing for SEO in mind?
- Do you have metrics in place to measure the efficacy of your localization strategy and approach, including sales data?
- Are there quality checklists in place for review cycles of content?
- If content migration is required, is there a content migration strategy in place?
- Is there content outside of the domain that requires migration? This content would include microsites or campaigns. Do flash components or embedded applications require migration? Can these be migrated as-is or do these require updated design/branding?
- Are there several channels that we need to consider? If so, what are they (e.g., mobile, web, print, call center, etc.)? Among these channels, which content is derived from a single source, versus which content is unique or differentiated per channel (e.g., product specifications on the mobile site are limited to four key specifications whereas the website provides all.)
- Is there syndicated content? Do these have unique lifecycles? Are there service agreements in place or licencing agreements in place for this content?
- Do you rely on third parties to produce content? How is the performance around this content measured? Are the processes for this content effective, including measurement and determining future-state content focus areas?
- Is there curated content? What are your processes around curation?
- For user generated content, what are your processes for each type of user generated content? How does moderation factor in and how well do these processes work or not work? Is response to user generated content built into the process and is it timely and effective?
- What is your archival process? Which laws or regulations are you bound to for archiving information? Which information must you preserve and for how long?



Technology

- Is there a CMS, DAM, or other type of content-related system in place today? If so, what is it? Are there additional systems to consider, such as a CRM system or product catalogue database (often referred to as a PIM, Product Information Management system)?
- If there is a website, portal, or CMS, how is information organized within it today? Do data models or schemas exist that we can access?
- Do you leverage XML and metadata effectively for system integration and for externally-facing code? Do you use XML to structure and identify content?
- What do you use for personalization?
- What types of analytics solutions do you have in place?
- Which other systems impact the content lifecycle?
- What are the different channels that we should consider (these include systems or platforms, such as web, mobile, customer databases, CRM, or analytics engines)?
- What are all the systems that impact content (e.g., product catalogs or asset/document management tools)? What are the strengths of these systems? What are the known issues with these systems? Are there gaps or integration issues?
- How do you manage your products today? Do you have a product hierarchy in place or multiple ones (E.g.: a 'back end' hierarchy and a consumer facing one)? Is this managed by a database or several databases? If so, identify and give a description of each. Could we have access to these schemas and/or hierarchies? How are products organized within this, and which elements do you capture?



Marketing and Content Marketing Strategy

- Is there a larger digital strategy which we need to be aware of in order to understand the digital landscape, its properties and content and brand requirements for the digital vision?
- Do you have a brand architecture in place? May we see how it is documented and any branding guide(s) you may have?
- Will there be any changes to your brand that we need to be aware of that could impact our current project?
- Who are your competitors?
- In your opinion, what are the best-in-class websites/mobile (or whatever the content solution is) we should consider when determining how your site measures up?
- How many markets, regions, or locales do we need to consider, insofar as content rollout is concerned?
- Do you have a list of all current campaigns?
- Do you have a list of all future campaigns?
- What is your go-to-market (products to market) calendar?
- What are all the social media platforms you use in your marketing strategy?
- How many end-user channels should we consider for content distribution?
- What are your target audiences?
- Do you have personas based on behavioural characteristics of your end-users?
- What types of search engine marketing do you have in place?
- How important is social media in your digital experience? How do you leverage it?
- What are all of the digital properties to consider? What are the non-digital properties to consider? Do you have optimized experiences across all channels?
- What role does content marketing play in your organization and what does content marketing own or not own? Is there a separate calendar for content marketing efforts and is this content evaluated, esteemed, or viewed differently organizationally than other content?



Omnichannel and Multichannel Publishing

Omnichannel is not the same as multichannel (which simply means considering more than one channel). You may have to educate your audience what omnichannel is and its importance in our industry. For reference see: [Content Strategy for Omnichannel](#) by Rebecca Schneider and Kevin P Nichols. See also my two books referenced in the introduction.

- Do you have multiple channels to which you publish content? If so, what are they? Do you optimize content per each channel (E.g., unique content for mobile smartphone and desktop website)?
- Do you have an omnichannel strategy in place? If so, can you share it with us?
- What are the challenges you currently face with multichannel publishing?
- Do you have a mobile strategy that considers smartphone, tablet and feature phones? Do any of your consumers live in countries where feature phones are primarily used?
- Do you use customer journeys and user tasks across multiple channels to identify which content to deliver to each channel to support a unified experience? For example, to purchase a product, a consumer might go from a TV ad, to a Tablet (look up the company) then to a desktop website (to do further research) then to a mobile device (for map functionality in locating or store or a QR scan within the store) and expect in-store content from a sales representative to support the experience. The consumer may share his or her overall experience on social networks after product purchase or expect a personalized experience when dealing with customer support.
- What is the maturity of your user journeys?
- Do you have integrated product inventories across channels? For example, can a customer see products that are in your brick and mortar store online?
- Do you have a singular view of the customer?
- Do you have metrics and analytics in place to measure content performance in all channels?
- Do you measure these across channels? Can you track a customer's actions across channels?
- Do you optimize content based upon analytics and metrics within each channel?
- For mobile devices, do you leverage responsive or adaptive design? Do you understand the differences?
- What unique content do you have in each channel versus what do you share across channels?

Analytics

For this area, you will require an understanding of metrics, Key Performance Indicators and analytics. For definitions and best practices for metrics see: [Positioning Content For Success: A Metrics Driven Strategy](#) by Rebecca Schneider and Kevin P Nichols.

- What are the key business goals and objectives we should consider? Do you have specific key performance indicators that we need to understand?
- How do you capture user feedback with regard to your content? Can you make easy and quick updates based on the feedback or is this an issue? Do you utilize applications to cull data in customer support call centers?
- Do you have any metrics in place to measure your metadata, taxonomy, or search tools? What types of end-user feedback have you received regarding the ease of use in finding information within your platforms?
- How well is the content performing overall? Can you assess content performance for all types of content?
- Do you use Google Analytics or any other type of analytics tool to measure access of your information and search queries used to find it?
- Do you test your content with A/B or multivariate testing? If so, how do you do this?
- Can we access any data you have on your users, the usage of your digital content?
- What types of web analytics do you cull?
- What levels of transparency exist for the information you cull on your end-users?
- Do you leverage the most important metrics for your digital experiences such as:
 - Length of visit within a specific channel or cross-channels
 - User path(s) or clickstream?
 - Conversion metrics (E.g., purchase a product, download a white paper, sign-up for a profile, register a product or apply for a job)
 - Bounce and exit rates
 - Depth of visit
 - Cost to convert
 - Visits to convert
 - Value of interaction
 - User interaction history
 - Social metrics such as share of voice and social listening?
- Do you currently have any search engine optimization in place for your website? If so, what?
 - How do you do it?
 - Are analytics a component of it?
 - Which tools do you use?
 - Are authors trained on it?
 - Is it working?



- What is the maturity of your SEO model?
- For web and mobile: Have you created a strategy to determine which pages you want to prioritize for SEO (e.g., home page, product landing page, corporate landing page, etc.)? Does every page have an SEO optimized HTML page title, metadata keywords and metadata descriptions? Are copywriters trained on the SEO process including keywords they should be leveraging to write?
- Do you have access to competitive intelligence that your competitors use for labeling, SEO, or indexing information?
- Do you utilize the Google Adwords Keyword Tool and Google Webmaster tools to identify keywords?
- Do you optimize your keywords based on mobile versus web?
- Do you use keywords for image alt text and do all of your images contain or have alt text? This is also an accessibility issue. Is creating alt text for images part of your content creation process?
- Do you leverage or use 'smart' URLs?
- For syndicated or third-party produced content, do you measure its performance? Which metrics do you use? Are these metrics within your control or are they measured by the third party producers?
- Do you leverage social listening as a key input to understanding what your consumers are saying about you, which content they share and what they like or do not like about your business, products or services?

Content Structure, Including Metadata and Taxonomy

- Do you currently use taxonomies within your organization? Are there taxonomies, thesauri, metadata structures, or other controlled vocabularies in place? Do you use specialized software tools to manage your taxonomy or other controlled vocabularies? Do you have a listing of terms used to classify and identify your information from an end-user perspective?
- Do you have existing metadata standards in place? Are there tools to manage these, and if so, what?
- How do you currently categorize, label, and identify information in your organization? How many of these models exist? Can we have access to each?
- Do you use XML or other code to structure your documents? If so, may we view your XML schema? Is your XML structure well-maintained and to which standards does it adhere?
- Are there requirements to index and maintain content that is not in use? If so, how is it stored and indexed?
- If you have a taxonomy in place, what does it accomplish (e.g., increases conversion on a website, standardizes terms, organizes information, drives personalization, decreases time spent trying to find information, integrates systems)?
- Who has definitive ownership for the taxonomies used in your organization? Are there several owners due to several taxonomies existing? Is there an enterprise taxonomy that rolls up under one central authority?
- Is there a system for tagging content? If so, how does content get tagged in your organization? If not, do you feel you need this? Are the users of this system trained in the metadata standards and SEO methods?
- Do you use taxonomies back-end and front-end taxonomies? A back-end taxonomy example is a product catalogue within a product information database. A front-end taxonomy is the product taxonomy that may be used as navigation and tagging on a website.

Note: Do stress the difference between taxonomy and navigation scheme.

- Do you have faceted (refinement) navigation or parametric navigation on your digital experience? If so, what do you use for technology to enable and manage this? Do you update your facets based on user research and use (elevating facets that are used and sun-setting facets that are not)?

Content Experience

(By 'content experience' I mean the future-state content experience you are creating for your end-users. This experience includes editorial, messaging, branding and product content requirements, such as what would go onto a product detail page.)

- Does your organization enforce a content style guide or branding guide? Could I obtain all information and documentation related to content standards that your business unit uses?
- Do you have voice and tone guidelines specific to channel, such as a web content style guide?
- Do you have a content brief in place?
- What is your high-priority content?
- What are the objectives that your content needs to achieve?

Note: you will want to do this for each content type, and include high-profile pages (1st two levels in a sitemap) including a home page, landing pages, product detail pages, and various section of a digital site.

- What content is missing from your digital experience?
- Which content opportunities are missing, such as personalization, cross-sell, social media integration, etc.?
- How important is a rich content experience, such as multimedia, and/or immersive and interactive content?
- What are the strengths of your competition when it comes to their content experiences?
- Do you create portable and/or shareable content? (This includes content that is 'widget zed,' and/or content that can be posted to social media or easily shared via email.) In its simplest form, this content could be represented by a PDF document.) If so, what?
- Does your organization make investments in new content creation?
- Do you produce thought-leadership? If so, how do you do this, and how do you share it?
- What can you tell me about the entire customer lifecycle when determining new content creation and/or enhancing the current experience?

Note: The entire customer journey includes not just the sales or purchasing funnel, but content that a customer would use after he or she has purchased a product, such as support content, warranty or service updates, product updates, and content to enhance the user's relationship with the brand.

- Is there intelligence built currently into any of your content?
 - Do you personalize content? How mature is your model? Do you look at personalization as an ongoing strategy? Do you have a roadmap to support this this strategy?
 - Do you up-sell, cross-sell, or use CRM to target content to specific users?
 - Do you use recommendation engines on your website (e.g., so many users bought this product so you might be interested in it, etc.)?
 - Do you have different states at which a user can access content? What are the current "flavors" of content? Are there decision trees that are documented insofar as user access to content is concerned?
 - Do you test the performance of these intelligent solutions to ensure continual refinement?

- For the new solution/design, which content is required to keep? (Note: This question may require validation of the content inventory, and may be more suitable to ask during the validation process of the inventory.)

Governance

- Is there a governance model in place for content?
 - For digital governance overall?
 - For content governance?
 - For taxonomy and metadata?
- Are there issues with governance—either lack of or dysfunction within the model?
- Which elements of the governance are federated versus which are centralized?
- How often does your governance committee meet?
- Do you have issues of content quality and maintaining consistent and uniform standards? Do groups ‘go rogue’ in creating their own set of rules? (For international or global initiatives, you may want to interview different, regional business owners of content).
- How do these factors play into governance and determining future content focus and priorities:
 - Daily, weekly, monthly, or quarterly assessments of analytics and content performance (these include information gleaned from analytics, user feedback, SEO and social listening)
 - User and consumer feedback
 - Analysis of trends and insights, such as industry-specific insights or considerations of emerging technology
 - Ongoing competitive analysis
 - Internal business data, such as sales performance and/or new business requests
 - New ideas from content teams
- What types of governance are enforced by standards, such as editorial or content style guides, business rules implemented with a CMS or other tool, brand guidelines, etc.?
- How does the governance structure function and who is responsible for its development and enforcement?
- What roles exist within your governance structure?
- Do you have a governance model that you can share? Is there a governance charter? Who is involved with it?
- If the governance does not exist by committee, does it exist in the format of standards or regulations or via a de facto model (as in a group oversees the role of governance but does not refer to itself as a governance group)?
- Is governance a frightening concept or word within your organization, and if so, why?

Entitlements

- Are there entitlements (i.e., is access limited to certain types of content)? How many entitlements exist? Are there sign-off controls? What are the touch-points?
- Can we get login-in information for any sites requiring authentication?
- Who will need access to any new content systems and what will they do within them? Which types of user roles and entitlements do you envision? Do you have a current list of each with your current content systems?