

**Hilary Marsh:** Hi, everyone. I'm so glad you're here today with me virtually, and I'm sorry that we can't be together in person but I'm just as enthusiastic about this topic as ever. I hope that you'll find this information interesting and also actionable. I wanted to start off with a thought. Content strategy is really figuring out all the aspects of how an organization's content will work, and content operations is really executing all of those decisions every day, putting it all into action. That's what this talk is about, so here's our agenda.

We have three things. First, we're going to start with using the foundation, the strong foundation that you've built already. Two, how to foster a whole army of champions and allies inside your organization, from your peers all the way up to the executives. Three, how to keep those content practices top of mind with all the people who are creating content in your organization.

I want to start with the foundation, with the work you've already done, and I really want to honor that. It's likely that when you started, the content in your organization was in a state of chaos. The organization may not have known what content they had, or if somebody left, if somebody removed a link from a landing page, if an initiative ended, the content might be still sitting out there. There might not be rules. There might not have been rules or guidelines for how content ought to work, what it should sound like, what its goals are, what belongs on the homepage.

They might've had multiple content management systems or lots of abandoned social media channels or microsites or test versions of content, but fortunately, they had you. You've built that strong foundation. You've done the work. You created job descriptions. You thought about collaboration. You thought about content audits and editorial style guides and created workflow and all of that work that we do as content strategists. There's a lot of moving parts here.

Then you wrote it all down. You created a Wiki so that the policies and all of that and guidelines can evolve over time, and you presented the work and then those new guidelines to the subject matter experts, as well as to marketing communications and IT. Now, you did the work and now the content is beautiful. It's organized, it proceeds in an orderly fashion from conception all the way through to expiration and archiving and everyone participates in the full process exactly like they should. Now you can finally take a step back and enjoy the fruits of your labor, right?

You might think, certainly, as I did for a long time, that writing it down is enough, that documents are enough to turn content chaos into a well-oiled machine. Here's my process. These are the steps that I walked through in a full-scale content strategy project or did, you know, until recently. Understand the organization and the business goals, so do a whole discovery process. Understand what the audience needs, audit the content, analyze the content. This might be a process similar to yours, develop guidelines, identify roles, and the governance models. Taxonomy, content transformation, or migration framework for content planning and marketing.

We've got here, we've got the tools, we've got the process. I wrote it all down. What I found, though, is when I would go back to a client after the work was done, after I gave them all of these documents in a playbook or whatever, a handbook, whatever we want to call it, I often found that other priorities had taken over. I found that the client still hadn't put all of those pieces in place, and despite their enthusiasm and all the work we did, the work was essentially gathering dust. Honestly, that broke my heart. Not only was my work wasted, the client had invested plenty of time and money thinking things through and they weren't using that thinking.

The thing that I came to realize is this: So content strategy documents are a future state. They're aspirational. They articulate what the rules are going to be. Just because you've written them down, doesn't mean that they are in place yet. Documents are aspirational and not only that, people are busy, they have short memories, and also the status quo has a tremendous magnetic pole. The takeaway there is putting content strategy into action, is not just about the documents alone, sad to say.

Last year I took that content strategy roadmap and I added two steps that really clients need to do. They need to determine what their staffing needs are and really, they need to plan to bring it all to life. I've summarized that as training and communications, but those things are so big and that's really what we're going to focus on in this talk. That's how you build.

The next step is that really, you don't have to go this alone. In fact, you shouldn't, but sometimes you have to build the army before you can lead it. I wanted to take a step back for a moment and think about why organizations find themselves in the kind of pickle that content strategy can help solve. Why content strategy and what is content? This isn't really an empty philosophical question. I think that you need to understand and help your colleagues understand the answer to these questions before you can really solve the problem. All organizations really are in the content business, but not all of them realize that.

By content, I don't mean webpages or blog posts, videos, social media channels, or apps, because those are really where we put the content, not what the content actually is. The content is our offerings, it's our products and programs and services and research and events and advocacy. It's the work that our organization does. The folks who create all these offerings, they are product developers, support specialists, instructional designers, event planners, lobbyists, et cetera, researchers, sales professionals, marketers, all of that. The output of what they do is words and pictures and audio and video, aka, content.

But in a way, *content* is a terrible word because while all of us use the word content to describe what we all create, for the most part, our colleagues don't, and because they don't see that they're producing content when you talk about content strategy, they really don't think that it applies to what they do. Excuse me. I struggled for a long time with how to get that point across. Here's what I came up with: Content is the way that our work is manifested in the world. For me, it's important to say that because otherwise

people think, "Oh, that's something that the communications people do or marketing does, and it doesn't apply to me."

If we make it clear, the content is what you're doing, then a strategy for the content is a strategy for your work. That's the opportunity here to really have much more meaningful conversations about the way that their work is getting out there in the world and therefore, a strategy for that, but if you don't have this conversation or at the beginning of those conversations, it sounds like this. People think, "Wait a minute, these are my products you're talking about and my work that you're talking about." It can be kind of tricky, to say the least.

If content represents people's work, of course, they feel a lot of ownership about how their work ends up in the world. In my experience, conversations about content strategy that involve telling people that they need to do their work differently sometimes gets a response like this. After many content strategy projects, both as an in-house staff member, as well as a consultant, I've come to realize that before this is a technical challenge, before it's a digital challenge, before it's really even a challenge about the content itself, it's a business challenge and it's really a people challenge.

Here's why this happens. It's not the individual people's fault, but it's the way organizations were set up historically. Historically, organizations, each department or each product line or each division, however your organization or your client organization is set up, each one was responsible for its own content, making decisions about the format, making decisions about the channel, and then getting that content to the audience that they wished.

Really before the internet existed, this was all that any of us could do. Granted, the internet, the web is about 25 years old, really, some organizations still look like this and they still, their mental model is still like this. This is how they're budgeted. It's how their jobs are conceived. It's how their individual work is conceived and it's how they think about what their responsibility to the audience and for the audience is. Yet this is limiting because then each audience can only know what they have been told and there's so much that they may well not know.

Instead, I have developed a different picture about how I think our organizations should work. The new thinking really is that our organization has a suite of offerings, a suite of programs and products and services, and all of that, that then result in a set of content, in a set of consistent formats and channels that then we together share with our audiences. This is a big change, but the opportunity here is huge because then audiences can both get what they came for. They can learn about that product that they learned about or that program that they're interested in, but they'll also see the other things that the organization offers right alongside that because it's all done in a more holistic manner.

To do well, we have to recognize that effective content requires a partnership. It requires a partnership between subject matter expertise on the left, which are all your colleagues, and expertise in presenting and sharing content effectively for an audience,

which is your part. This is how we get out of the toddler mode and it's how we really tell our colleagues that we are here with you. We are not here against you. This is your subject matter expertise that we're not taking away, but instead, we're offering a partnership so that your work is going to shine more.

Making content strategy stick is ultimately about the people. Nobody likes being told that what they're doing is wrong, and more important, no one appreciates just taking orders from a colleague. How you do the content strategy work matters a lot. It's important that to make sure that you have a strong foundation for your content strategy, not only guidelines because they seem good, but guidelines that are grounded in research, that you've mapped out roles and process, that you've identified what people and what—sorry, what tools you're going to use, but all of that that you've written down is still essentially a draft. It's a work in progress until you start putting it into play.

After you have all that in process, I want to show you— My next idea is like this thought of success before buy-in, which seems counterintuitive, but let's work our way backwards starting at the right. After you've had buy-in the policies and guidelines and all the work you've created will be the way things work, but to make that happen, you need to get the executive buy-in, and you can't get the executive buy-in until you've done a pilot project or two, and you can't do a pilot project or two without finding the internal champions. That's your process.

First, you're going to look for the internal champions. You're going to do some pilot projects to make sure that you know what's going to work and not, then you get executive buy-in, and then you're going to have those policies that are really followed really by everybody who works there. Now, I want to talk about allies for a minute. An ideal way to ensure success is to enlist the people who already get it and start with them. I bet you know who those are, those people are already. Those are the people who've been eagerly waiting to do things differently.

They're the ones who don't have patience with too much bureaucracy or too many rules or too many gates that are getting in their way of getting their material out there. They're the ones who are most passionate about the organization and its work, and the ones that came up after your content strategy sessions that you may have had to ask questions. Those are the people that you want to enlist to help you try out some of your new content practices. Some of those people are the ones who started out as naysayers. They're awesome candidates also because, ultimately, if you're setting yourself up as their partner, they're going to turn from a naysayer into an ally and a champion too.

In 2017 and 18, I lead, co-lead, a major study of content strategy, adoption, and maturity in associations. It also applies to other content-rich organizations. I did that with two colleagues, Carrie Hane and Dina Lewis. We found that many organizations start their content strategy work with a small group of people who see the positive difference that content strategy can make. Those internal champions are a tried and true approach. These people would probably love to help and they'd be eager to use and even add to what you've created.

When this happened to me in the past and I would approach someone or I would finish my content strategy work, rather, sometimes my first reaction was to be protective of my work, but ultimately, I discovered by working with these few allies, to begin with, or champions, to begin with, I discovered two things. First, the trying it out, that idea of a pilot project as an experimentation process made the work better because we learned actually what worked.

Also that the act and the process of trying it out with someone went a really long way toward building that bridge and building a better relationship and engendering trust, which is really a precious commodity inside an organization. That's this time for learning. The value and opportunity that you have by doing under-the-radar pilot projects is that you're going to establish preliminary goals. You're going to do the work and put the content out there in a new way, a better way, whether that's, try podcast, try longer form, try shorter form, try videos, whatever it is, and then you're going to measure.

How did it do in partnership with that subject expert, and to look and see, well, this worked, but this didn't. Let's try it if we promote it differently. Let's try it if we put it in the newsletter or put it on the homepage or whatever we're going to do with our content, let's learn together. Then after you've done a pilot or two project in partnership with a subject matter expert champion, using those guidelines you put in place after you've made the mistakes, after you've gotten better, after you've done your initial learning, now you're ready to have the conversation to get the executive buy-in.

Depending on how your organization is structured, that might not be you. It might be your boss or it might be somebody else, but still, you're going to write the script. Basically these four things are the script. We have a problem. We know our content. Our products aren't as successful as we want. We know too many people are calling because our health content isn't what it should be.

We have a problem and it's a content-related problem that's having a business impact and I know how to fix it, and that's where you talk about the content strategy work you did, the things you put in place, and I know that this new approach is going to work because I've tried it and I've learned. I'd like your approval to move forward with this kind of thing on a larger scale.

At the end of that meeting, whether it's you or whether it's your boss or whoever it is, you're going to likely have the blessing of that executive because there's no way that they're going to say no. Then you have their stamp of approval on that content strategy work and now you have permission actually to get it adopted. Then it's not really an option for people to say, "Well, I don't like that rule, so I'm not going to go along with it," and it's not really because you said so, because you've tried it, it worked, and you have the blessing of the senior executive.

In a hierarchical organization, in a legacy organization, which are the ones that I've worked in and the ones that I work with as a consultant, you need that sort of buy-in

from the top in order to motivate people and get them to see that they really have to change what they do.

Back to the subject matter experts, one way that I have found, a little thing that makes a big difference, is to change the language we use about the content. We were all in the habit when I— I used to work for the National Association of Realtors and I oversaw the member websites. A million members, 23 departments, it was a very big organization, a big website. All the departments that created the content called it their content and they thought about it as their content. I found that we started to make a difference and make in-roads when we started calling it *our* content so that this isn't yours to decide, it's all of ours, and we are creating it and sharing it for our members.

It's that point in the process, once you've gotten that buy-in, once you're starting to talk and think about the content differently, then you're going to invite the subject matter experts into the process of what it looks like to create their content differently and to do that work. It's important to have this phrase *with you* and not *to you*. I often will repeat this over and over again; this is not work that we're doing with you because by rolling it out, rolling out the content strategy policies and guidelines on a bigger scale, it is still going to evolve and it's still content that they are about, programs and offerings that they are responsible for.

It's really important that they feel included, that they feel like a partner and not just a recipient. You want to be a good listener. You want to listen to their concerns, understand their goals and really understand what they're accountable for so that you see that they're not just acting in a way that's different than you might like because they feel like it, but because that's what's being demanded of them.

When you do things like go through the content audit and say, "Here's what we found about your content," reinforce what they're doing well now, doing well now and why it's good, and extend their good work with education. "You're doing this and it's really working, and you're doing this and I find that it's not really getting the visibility or usage that you might think, so how are we going to do it differently? Here's something that we tried in a pilot that worked, and here's what I would recommend for you."

Another tactic here is to help them see and empathize with the audience. I've given huge talks about this. There's a technique called empathy-based personas, where it's actually the staff people who spend time brainstorming and spend time crafting and thinking through, what are the motivations and aspirations and challenges that the audience has, so that they're starting to see their work from the outside in, and anything you can do to help shift that, whether it's through a brainstorming session or through any kind of exercise, but help them really see and more importantly, empathize with the audience so that they understand that they exist for the audience instead of the other way around.

My other recommendation, sorry, is that collaboration or content taken to a whole other level and the idea of content reuse and planning together is really a win-win. It helps them get like information, information about the same topic, or for the same audience or

for the same purpose out there faster, which always comes back and translates into greater success for the offering that they have.

Then the next process is how to keep content— The next step and the third area of my talk is how to keep content practices alive, or how to help good practices go viral. We have new ways of working in our world. A great analogy for content operations is driving. Let's think about all of the things involved with driving. This is literally the book of the rules of the road in terms of driving in Illinois, everything. Here's like one sample chapter and the content, and it's 112 pages long. The chapters cover everything that you would think about in terms of what you need to know for driving and even things that aren't necessarily top of mind, but it's a very comprehensive book.

Yes, I am thinking about an analogy between all of our content strategy documents, which constitute the rules of the road, and this, but we do not just write down all the rules and then hand somebody— Oops, I went the wrong way. Hand somebody the keys to the car and say, "Well, go read the book. Good luck." We in fact have a lot of other pieces that go into educating training, enforcing, reinforcing, and enforcing those rules of the road. Essentially this is the governance part of driving.

When cars were first invented, none of this existed, and why? Because it wasn't needed. Horses just didn't crowd the roads in the same way, drivers could see each other and they weren't going 65 miles an hour. The very first electric traffic light was installed in Cleveland, Ohio, in 1914. Since then— [coughs] Sorry, after that— Sorry, excuse me, people developed an entire language of signage and replicated it across the US, and to some degree, around the world. They created the standard set of signs, and these signs represent a visual language that's easy to see in a car that's going quickly.

We see them in the world. We have walk/don't walk signs, and this one looks slightly different than the typical ones that I see in the US because this one's from Canada. In the UK, they have, they have special ones that are different because they're anticipating the mistakes that often are made by people visiting the UK, who aren't used to drivers who drive on the left side of the road. They'll step right out into traffic. South Africa, same thing. These are literally signposts and guidance that we need on the spot.

As I'm talking about this, think about how we could translate the content strategy work from an abstract written document into something as concrete and real as this. Similarly, not only that, not only the guideposts, but we have education. We picked an age where kids could qualify to be good and safe drivers, mostly 16. Then we make sure that they practice, that they take a test, that they pass a test. They have to show that they know. What are the analogies that you could draw with all of that too? Is there a test somebody could pass? Is there education that you have to have? That's, at the end of the day, what we need to put in place in order to bring our content rules of the road to life in the same way that we put the real rules of the road to life.

Here's the governance topics that I do in a content strategy project. What are our life cycles of content? How long do different types of content live? Are they stored in an archive someplace? Do they just go away? What's our team structure and staffing?

What's the oversight and escalation process? Who's reviewing what? Who has authority to say no? All of these things, that's content governance. The governance pieces are exactly what's going to translate into the operations. The governance work is going to be what becomes operational.

Really they're intended to answer this question. If somebody doesn't do that, what happens? In real-life driving, you might get a ticket or worse, you might get in an accident, right. In terms of content, the analogy there is if old content is out there, people are going to have incorrect information. They're going to show up at the wrong location for a conference session. They're going to sign up for an event that passed, they're going to assume that statistics they read on your website are still true, et cetera.

They might get information wrong that harms them or harms your organization and if people try to go around you and, for example, skip a review process, skip a workflow and just try to get out there, you need to have thought through what's going to happen then.

I like to say sometimes that content strategy is an HR issue. People usually think, like, "Oh really? What do you mean?" I'll tell you: One reason is that content has to be part of people's job description. It has to be an official, explicit part of what they do. If the organization is going to expect them to create the first draft of the content and then hand it over to you to do your thing, write that down. If it's that you need to work on it together, write that down. It has to be part of what people are expected to do, just like they're expected to do everything else.

If they're expected to do a profit and loss statement about their product, then that's part of their job description and their content work needs to be also because nobody's going to do what they're not measured on, what they're not rewarded for and they're not going to certainly do it in their spare time because nobody's got that kind of spare time anymore.

Communications and training, remember those were the two extra steps that I added to the content strategy roadmap. Those are regular reminders and updates. Meetings, maybe, or internal newsletters, or stuff like that. You want vehicles to share successes, and I'll talk more about that in a second. You may want to establish communities of practice so people can train each other and support each other, whether those are online or in-person depending on your company. Of course, nowadays they're more online because we're all virtual.

You want to include content training in part of the onboarding process and new employee orientation and also make it part of their professional development program. Again, real HR kind of stuff that we don't often think about as content strategy folks. You also want to lean on your technology. Make it easy to do the right thing and hard to go around it by doing it wrong. You want to have a content request forum where you're not going to even entertain content requests unless you know, when do we need it? Why? What does success look like for you?



You want to build into the content management system, what headline length limits? Also have tips, writing tips, right in the CMS itself. You want to have automatic expiration dates for specific types of content, which means you have to have thought that through on the tech side. Build in a review process that you can't skip, and again the job descriptions. There's motivation science and there are three pieces, three things that motivate people to change their behavior. I'm going to talk about them right now.

The first one is social incentives. Social incentives are a visible way to show you how you're doing compared to other people. We see this often in electric bills or energy bills. Here's a screenshot of one that shows you that you are using more energy than your more energy-efficient peers. In Illinois, and this was rolled out in 2009, and the first group of customers to get those reports reduced their electricity use by 2%. These things really work and did the article about them that I have linked here.

It's very interesting because first, it said people were not happy about it, but ultimately, it really, really motivated them because they wanted to see their results improve. We can think about and really apply that to content work as well. People want to do better than their colleagues. They want to do better than they did before. How do we make that visible? Is there some sort of dashboard that you could create for them?

The second one is connected. It's real-time feedback. Again, we see this in real life, in terms of those speed signs on the street that show you how fast you're going and usually right under that 42 would be 35 mile an hour speed limit or whatever that is. This would be an analytics dashboard that shows people in real-time what they're doing or A/B testing, for example, where you could test different kinds of headlines, different kinds of promotion tactics, different formats, but real-time. How is this doing?

Then the third one is to reward success. There's a lot of creative ways to recognize people for doing good work. One is treats for sure, easy. There are some that don't cost anything. The classic example is the employee of the month who gets the prime parking spot. That costs the company zero and it makes the person feel really proud and be able to brag essentially for that month.

Similar ways to do that are public recognition on the intranet, have people stand up at a staff meeting, put together tokens of congratulations along the lines of M&Ms, or it might be something more content-focused, like greater permission to publish with fewer reins. Maybe they do get to skip a step. Maybe they get to go faster, sort of an express version. You might want to reward their success in an email to management and copy them so that their boss and their boss's boss know what a good job they're doing.

You want to bring the artifacts of your work to life. For your organization, you might want to create a pie chart showing the results of your content audit so that people can see, for example, that before you started the work, 60% of the content—and I'm just making this up as an example—60% of the content had fewer than five unique page views in the past year, and that's not at all untypical from some content work that I do.

Or you might create a poster about a content strategy statement, just as your company has its mission statement on a plaque in the lobby. Really, in terms of which artifacts are you going to bring to life, because there's not unlimited time. You want to choose the ones that brought the most insights. The empathy-based personas, for example, are often some of the most transformational or resulted in the most transformational insights in any part of the project.

Here are some examples of how those artifacts, how we brought those to life. Here's an example of a persona and a journey for one client, and they're good. These are really good and they represent lots of hard work and lots of really good thinking, and we took them to the next level. When I worked at the National Association of Realtors, we took our personas and made life-size cutouts of them. For each one, I wrote a tiny script and I asked somebody on the staff, not someone on my team but another staff person, four other staff people to each read to introduce them.

Hi, I'm Susan. The one on the left. I'm a realtor, I've been in the business for this long time, and here's what's going on for me. Here's what I need, here's what are my priorities, et cetera, and we did that for all of them. Then I took those cutouts and I left them standing outside my office so that when somebody came to me to ask for new content or new functionality or a new section of the website, I would go over and say, how does this fit in with Susan's motivations that she told us about, and does this further her? If not, it was a pretty hard sell for sure.

Clients have really asked for how to make these kinds of things more visible and this is a great way to do it. Another option, the same client who you saw a minute ago with the persona documents, they actually distilled them into these posters that they put on a little stand and that's what they used when they introduced the personas at a staff meeting. They even took it a step further and they created a short video for each one. Now that work is really visible and it's really out there and the people who created those videos and created the scripts and saw the videos, they experienced it in a deeper way than just words on a page.

You also want to make it fun. Maybe you want to make laminated card-size versions of these personas. Maybe you want to have scavenger hunts. We're inviting people to find content rot, or maybe you want to do jargon bingo, which is always fun. Or maybe you want to offer— and maybe you want to offer prizes, sort of swag prizes. Pens with a content mantra on it, or stickers for rewards that— Sorry, stickers that show, "I'm a content hero," and really sometimes those are sneaky reinforcements if the particular rewards and prizes echo the content guidelines themselves.

Another really fun idea is to invite people to create memes. Here's an example of a whole bunch of homemade memes that people created for our current mayor. These have nothing to do with content at all, but Chicago's Mayor Lori Lightfoot is sort of a no-nonsense person who's been emphasizing the message of stay home, stay safe, all of this. People have started making these really cheeky and fun memes for her and showing her in all kinds of situations that you can see. "We're off to see the wizard?"

"Nope. The heck you are," see go to bio, like, don't be out. Here's one at the bottom that said don't go out for Easter, the last supper.

Very homemade, they're not polished, and that's the point, almost. I can certainly envision a friendly competition of memes where you take the winning one. Maybe you have people vote on it and you put it on a mug or you put it on a T-shirt or do something like that. That could just be really super fun. The ultimate goal here is that the new ways that content works really start bleeding to the rest of the organization.

It's not your way, but it becomes our way. When people do it right, and their work succeeds, and they follow your guidelines and their work succeeds, then they can feel really proud of what they're doing, and you're helping them show off their pride. People love that. This is the sign of content strategy maturity, and you can be the catalyst for making that happen. Then it becomes part of the organization's DNA, it becomes part of how things work at the organization.

That's all I have to share with you today. Here's the resources that I mentioned, links to the content strategy roadmap that I created, the governance topics, the TEDx where it was how to motivate yourself to change your behavior, content strategy, content maturity assessment tools so that you can see where your organization is, and that study that I mentioned about the maturity as well.

Please feel free to stay in touch, keep in touch with me, and join the content strategy community. We're 900 strong at this point and it's really relevant and on-topic, I promise. I also want to invite you to continue the conversation with me about this particular topic, about content governance and operations, on Monday, May 18th, at 2:00 PM Eastern time. If that event has already passed when you're watching or listening to this talk, no worries, it's been recorded.

I'm also hosting conversations about content staffing on Tuesday and issues that associations and nonprofits face on Wednesday. As always feel free to reach out to me via email or Twitter to discuss any aspect of this topic. Thank you so much for your time today and enjoy the rest of the conference. Bye.

**[00:47:11] [END OF AUDIO]**