<dita>strategies

CONTENT STRATEGY + INFORMATION ARCHITECTURE = CUSTOMER SUCCESS

By Amber Swope & Chris Hibbard

Content strategy and information architecture are two different disciplines that work together to create customer success. Information architect Amber Swope and Content Strategist Chris Hibbard share some methodologies and processes, best practices, and insights on how content strategy and information architecture work together to help make client projects succeed.

Content strategy

There are many ways to define content strategy. In the context of this article, content strategy defines how content will meet business needs and satisfy end-users, guide your investments in content systems and publishing capabilities, and inform migration/transformation plans and performance metrics.

There is a trend across enterprises, large and small, to view content as a valuable asset. Businesses are moving away from framing content strategy as a cost center. Rather, businesses are taking a broader perspective to consider how content increases business productivity and how it can support the mission and brand of the business. In this respect, content is seen as intellectual property and worthy of business investment. The content strategist is central to this ongoing evolution and is an important influence on business decision makers in the enterprise.

Information architecture

Information architecture, or IA, is sometimes used synonymously with content strategy, but they are different. Samantha Bailey defines IA as "the art and science of organizing information so that it is findable, manageable and useful." While the science of IA is utilizing standards, taxonomy, and best practices, the art of IA is collaborating with the content strategist and client to understand what success looks like and designing the appropriate solution. It takes judgment, experience, and creativity to determine the best way to structure, manage, and assemble content.

A successful IA provides a transactional framework that leverages modular, structured content and metadata to deliver effective content experiences. Because we don't know how or where users may experience that content in the future, the IA design must future-enable the content.

CONTENT STRATEGIST

CLIENT

INFORMATION ARCHITECT

Phase 1: Define Success

Because developing a successful content strategy requires clear goals and deep collaboration, defining success is the first step.

The content strategist starts by assessing the scope and priorities for the project. We conduct stakeholder interviews, review business challenges, and lead work sessions to clearly articulate the problem we are trying to solve.

Based on the assessment, we identify how the content could solve a business problem or move a user to action. By grounding the project in the client's real-world challenges and opportunities, we can enable the content to inspire and enable quantifiable action.

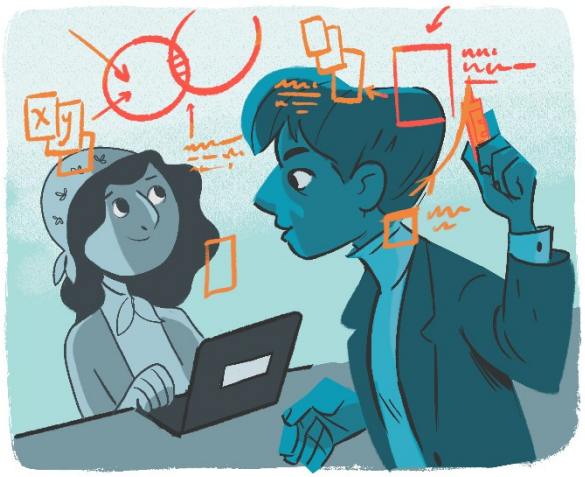
Once the business challenges have been identified, the content strategy action plan lays out the different kinds of content, rationale, dimensions around content context (how and where it's being used) and sustainment. A good content strategist will look at the content problem domain from an operational perspective: how will peoples' daily lives change? How much will it cost to produce that kind of content? Is it sustainable? These factors go into a framework that allows the strategist to engage different stakeholders and develop a shared vocabulary around what we are trying to achieve. Defining success assures that we are establishing the correct shared vison, vocabulary, and business framework.

Phase 2: Assess current status

Defining where the client needs to go begins by assessing where they currently are. This starts with performing an assessment of systems, content, and processes based on success criteria grounds the project in a solid business case.

The content strategist starts with a preliminary content audit to assess how much content there is and look at patterns in the content landscape. Equipped with that data, we conduct a quality and design review to determine if the current structure is meeting the business need and, if not, to determine how should it change

Next, we evaluate how the content performs; which includes understanding workflows, how the content is being used, and what needs to change to achieve business outcomes. Because content has a life of its' own, we need to plan for its' lifecycle.



To help executive sponsors confidently make the decision to fund a major content project, we develop a clear financial rationale that includes the cost savings and a business case for the investment.

Lastly, we collaborate with the client on the content strategy roadmap – nothing is achieved without a plan! The plan clearly articulates what, how, and when things will be done and sets expectations for all the stakeholders.

Phase 3: Envision Future State

Now that we have defined success and the client's current state, the content strategist and information architect collaborate with the client to envision the future state of their content information architecture, technology, and processes.

Content Strategist

As the process evolves, hypotheses will continue to formulate. We use these hypotheses to develop models and shared objectives to get stakeholder alignment. With a completed content analysis, user context map, and sustainment plan in place, we frame it out using an interaction model.

The interaction model tells us where people are going to consume the content and the context within which they will consume it. For example, the way in which users will interact with an email will be different from that of a knowledge portal or helpdesk solution. It's at this juncture that we develop real user scenarios and model out how we want users to interact with the content. The interaction model considers how the context and delivery channels will support the end-user who will consume the content, at their point of need.

Information Architect

At this point, the information architect joins the process. Based on the content strategist's work, we can start analyzing the deliverables that we need to create.

The architect analyzes each of the high priority deliverables to identify their purpose, structure, and how they serve the end user.

Based on this analysis, we can define the requirements for each deliverable type, including the necessary metadata. For example, the structure of a guide is different from a whitepaper, which is also different from a news bulletin – and the metadata about each of these deliverables differs based on how we expect users to access it. The architect must understand what metadata each content unit requires. Whether the users access the content via an embedded system, a research portal, a mobile app – whatever the delivery platform is, we need to know what success looks like to build the right architecture.

> **"Context drives content effectiveness."**

Phase 4: Analyze Future State Content Requirements

This is essentially a gap analysis of where we are and where we want to go.

Content Strategist

The context delivery model allows us to incorporate user research – conducting primary user research around content and interaction design, including wire frames and clickable user interfaces (UIs). This user research influences analysis around future-state requirements to determine how people will actually use content now, and in the future. The context model looks at multiple dimensions beyond content – it defines for the business, where and what types of users will consume the content as well as the targeting key attributes to provide the right content to the right people at the right time. The context model informs both the technology requirement and the metadata model, which provide the context for the content design.

"Not all content is created equal — invest in your high-priority content first."

Information Architect

Using the content strategy research, we can evaluate the deliverables in a new way and then structure each one to support the users' needs. First, the information architect creates diagrams that identify the content types, content hierarchy, and metadata for each deliverable. We then analyze the content set to evaluate how often content of the same type appears in different, related deliverables to identify redundancy, and observe how structurally consistent deliverables of the same type are across the content set to determine consistency. By reviewing the comparison results in the context of the content strategy research, we can develop the best deliverable structure for the future. Amber uses diagrams to validate the proposed structures with the content strategist and client.

When we are clear about the purpose of content, we can be clear about which deliverable should be its home. By using this matrix based upon the prioritization we receive from the content strategist, the information architect can understand what content is most important for user success and focus on this high priority content.

The final activity in this phase is to write a summary for the client to validate observations. This feedback confirms what we got right and clarifies what we got wrong. By collaborating with the content strategist, we gain valuable insight into stakeholders and internal clients' needs.

Phase 5: Develop Initial Design

Up to this point, content strategy has been leading the work. From this point on, information architecture leads and does the bulk of the work.

Information Architect

At this stage, we will create content diagrams to understand what is in each unit of the content collection based upon its purpose. For example, for a glossary definition we need to know the following information: term, definition, first instance form, symbol, and alternative forms.

For each content type, we need to know what the structure should be so that we can start testing it. This includes identifying exactly what individual pieces are for each type. In the case of a glossary topic, it means defining how we create each of the above items.

We also use these diagrams to show and communicate to stakeholders how modular, structured content works and get feedback that we can translate into technical requirements.

Diagrams also help us understand the relationship between content units. For example, a glossary definition is more useful when it's linked to an instance of that term in the run of content. We want to build relationships so that we can leverage them in different ways in different contexts. In the glossary example, we want to associate the definition with the instance of the term so that a user can easily access the definition when using the content.

Finally, we want to determine the required metadata and then start prototyping it with the content. We collaborate with the content strategist to perform Proof of Concepts (POCs) to show the art of the possible for content structure and delivery.

Content Strategist

At this juncture, it's important that the strategist works with the architect to understand content delivery and interaction design requirements and to contribute a lens for how the user experience (UX) design around the content should occur. For example, we look at how to render out search collections and interactions around the actual publications themselves. The strategist collaborates closely with UX designers to optimize the user experience in a way that content will be consumed and enable real-world action.

As a consensus building measure, strategists reach out to stakeholders and share out the progress, making sure that there is organizational alignment around the direction and vision that we are moving towards. As we decisions are made around design and we propose improvements to content systems and structures, we try to be mindful that the changes will impact the team's daily work – there are team members that are unknowingly signing up for work they may not have yet agreed to – so we do a lot of work facilitating a line-of-sight into the direction of the new systems and new content structures. Stakeholders must understand what is coming at them and their needed participation.

"Diagrams help stakeholders see their content in a new way."

Phase 6: Validate Design + Plan Work

At this point, we are receiving feedback from the client on all aspects of the initiative: user testing success, content relationships, metadata usage, etc. This is really a collaboration – a conversation we are having together and with the client because they are the ones defining success. We are building the ecosystem, but they ultimately must be able to maintain that ecosystem. To get this right, the process cannot happen in secret – it requires transparency and collaboration to work.

Information Architect

Based on the results of the POCs and additional analysis, we can validate the proposed design for the content and deliverable diagrams, as well as metadata design. Because the metadata is crucial for empowering the content, it's imperative that we identify the proper metadata classes and values for each content type and deliverable type. When possible, we leverage the existing metadata values, such as those in the corporate taxonomy, to support consistency between systems.

In addition, now that we know what content types we have and the deliverables to which they belong, we can develop a content reuse or sharing plan. Ideally, content sharing allows for authors to create a single instance of content that can be presented in all the appropriate delivery contexts – this means that some content may be reused during authoring and other content may be reused during deliverable publishing or content presentation in a given context.

Content Strategist

As all this point, the content strategist begins to facilitate the handoff to the implementation team. We want to make sure that the insights we gain along the way are transferred in more detail to the team members who are implementing the work. The strategist facilitates the transformation work plans and scheduling. As the system gets built, there are different parts, from a technical point of view, that will be deployed initially, and so we must make sure that the content transformation work plans are feeding content to those systems as they come online. It's important to recognize that not all content flows equally though the ecosystem. As we review the road map for the technology implementation, we also look at what content needs to get transformed and how the sequencing events for the content transformation will support the implementation. Content has to flow together like gears of a clock.

Phase 7: Implement + Iterate

The final step of the process is to implement and iterate. At this point, we are formalizing the first round of content to lay down the baseline. We have to finalize what we have and understand what is needed downstream.

Information Architect

At this point, we formalize the content model – that is the detail and structure for the deliverables and content – and create final sample files for the downstream processes to use. These processes include content conversion and migration, authoring templates, content validation, automation, and deliverable publishing. Because content is IA in practice, authors need templates and validation rules to support their success. The IA may be beautifully-designed, but if content creators can't efficiently write content in it, then it has failed. Their job is tough enough; our job is to enable them to be successful.

We also take the time to document not just what we decided, but how we got there. We use a set of templates to document the requirements, the questions we asked, the options we considered, and why. If we don't document the process, then we can't address stakeholder questions about how we designed their solution.

The documentation includes the metadata values. Because delivery systems are constantly evolving, the metadata will not remain static and we have to understand why and where metadata is applied – at creation, through publishing, at the delivery – so that we can get the experience we want.

Content Strategist

From a content strategy perspective, implementation and iteration revolves around the transformation and migration activities themselves. As Peter Drucker said, "Plans are only good intentions unless they immediately degenerate into hard work." – that's the value of strategy – it actually enables work. For this reason, my team collaborates with others to do the transformation work. This allows us oversight on the quality of content and the realization of the strategy that we proposed at the beginning. It creates a feedback loop to make adjustments as we go.

> **"A successful project realizes the client's goals and can actually be completed."**

Summary

As content strategy and information architecture work in concert through the phases, it becomes clear how they are mutually beneficial and together deliver customer success.

How content strategy benefits from IA input

From a content strategy perspective, IA provides reusable, structured content components. Structuring content components not only enables the flow of content through the ecosystem, but also supports component experience design and enables better ways for consumers to consume and use that information. IA also creates new opportunities to solve business needs in new and better ways. For example, a lot of our recommendations were made possible by new technologies and new content structure.

IA BENEFITS CONTENT STRATEGY BY:

- Providing reusable content components
- Creating opportunities to solve business challenges in new and better ways
- Enabling contextual content delivery, at scale

IA also enables contextualized content delivery at scale. For example, a million pieces of content need to be structured and standardized in order to be delivered. In the case of our mutual client, there are five different delivery end points (that we know of) where consumers would be able to access that content now that it is structured. We know we are doing it right because we have enabled the executive sponsor to go out, show, and get buy-in from other stakeholders. As a result, this is a system that a lot of people want to adopt, and being able to work together has made a huge difference in that success.

How IA benefits from content strategy input

Content strategy adds value to IA by defining context of the content creators as well as the end consumers. As content flows through the system, it ultimately enables real world action, so the context of the user really informs the metadata and structure. Without this context, all we have is content with some metadata. We want to understand *what* metadata needs to be applied to which content units.

CONTENT STRATEGY BENEFITS IA BY:

- Defining content producer and consumer context
- Anchoring IA decisions in the real world
- Providing guiding principles for structured content

Having input from content strategy to narrow the focus really helps us think about how people can actually create this content effectively. This anchors IA decision-making in the real world and provides guiding principles for structured content.

Phase-specific Deliverable Checklist

Use this checklist to guide content strategy and information architecture coordination in your project.

Phase 1: Define Success

Content Strategy

- ☐ Scope & Priorities Assessment
- ☐ Business Opportunity Presentation
- ☐ Content Strategy Action Plan

Phase 2: Assess Current Status

Content Strategy

- ☐ Preliminary Audit
- ☐ Quality & Design Review
- ☐ Content Performance Evaluation
- ☐ Cost Savings Assessment
- ☐ Content Strategy Roadmap

Phase 3: Envision Future State

Content Strategy

- ☐ Content Matrix
- ☐ User Context Map
- ☐ Sustainment Plan
- ☐ Interaction Model

Information Architecture

- ☐ Prioritized Content Deliverable File List
- ☐ Deliverable Type Requirements Documentation

Phase 4: Analyze Future State Requirements

Content Strategy

- ☐ Content Gap Analysis
- ☐ Context Delivery Model
- ☐ User Research Plan
- ☐ User Interviews Schedule
- ☐ Sustainment Analysis

Information Architecture

- ☐ Deliverable IA Structure Diagrams
- ☐ Content: Deliverable Matrix (same deliverable type)
- ☐ Content: Deliverable Matrix (different deliverable types)
- ☐ Deliverable Analysis Summary

Phase 5: Develop Initial Design

Content Strategy

- ☐ Content Delivery & Interaction Requirements
- ☐ Facilitated Stakeholder Alignment Meetings
- ☐ User Testing Results Analysis

Information Architecture

- ☐ Content Type Requirements
- ☐ Content Type Structure Diagrams
- ☐ Content Type Relationship Diagrams
- ☐ Metadata/Taxonomy Proposal
- ☐ Prototype Content Files
- ☐ Proposed Content Model
- ☐ Sample Deliverables

Phase 6: Validate Design + Plan Work

Content Strategy

- ☐ Implementation Team Handoffs
- ☐ Transformation Work Plan
- ☐ Staffing Proposal

Information Architecture

- ☐ Updated Design (based on feedback)
- ☐ Refined Metadata Proposal
- ☐ Content Sharing/Reuse Plan

Phase 7: Implement + Iterate

Content Strategy

- ☐ Content Transformation & Migration Activities
- ☐ Content Quality Reviews
- ☐ Project Tracking Reports

Information Architecture

- ☐ Formalized Content Model
- ☐ Formalized IA Documentation
- ☐ Formalized Metadata Implementation
- ☐ Final File Samples
- ☐ Authoring Templates
- ☐ Validation Rules
- ☐ Migration Rules Spreadsheet

Amber Swope is an internationally-recognized expert on the Darwin Information Typing Architecture (DITA) and information architect. With over 20 years of experience in the information development field and 15 years of DITA expertise, Amber specializes in helping organizations create opportunity through information architecture. She not only helps teams build scalable IA solutions to future-enable their content, but also mentors team members to advance the architecture as it evolves to meet new business needs.

DITA Strategies, Inc. provides information architecture support of the DITA implementation process for learning and training, technical content, customer support, and marketing content across a range of industries.

Chris Hibbard heads the Tahzoo Studios innovation lab, helping clients realize their vision for new product development. He works closely with business leaders to challenge and cajole, solving content and business problems through a Design Thinking lens. Chris has served as an innovation catalyst for companies such as ATT/Direct TV, Starbucks, Deloitte and Transamerica. His deep technology expertise serves his approach to content strategy and he's actively called on to speak on topics related to content and product innovation.

Tahzoo is a full-service Customer Experience consultancy with expertise in Knowledge Portals, Digital Commerce, Global Healthcare and digital Financial products. Clients include Jaguar/Land Rover, Starbucks, Brown Forman, HillRom, Zimmer Biomet, Wells Fargo and Transamerica.