

# Content Strategy at Work

REAL-WORLD STORIES TO STRENGTHEN  
EVERY INTERACTIVE PROJECT

Margot Bloomstein

WITH A FOREWORD BY KRISTINA HALVORSON

# **IN PRAISE OF CONTENT STRATEGY AT WORK**

*This book will change how you think about building a brand. Margot's in-depth grasp of content strategy outlines a fresh and essential approach for businesses that want to connect with customers in an age when providing value is no longer optional.*

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EVP Global Innovation & Integration, Edelman

*Bloomstein vibrantly brings content strategy to life through engaging real-life stories and step-by-step tactical methods. Underscores the value—and ease—of implementing content strategy. An approachable and actionable guide to put content strategy into practice in a way that will improve every communications project.*

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Content Strategist, Facebook

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*In Content Strategy at Work, Margot Bloomstein has the courage to delve into the messy problems that hinder content strategy projects—lack of interdisciplinary collaboration, outdated working practices, weak governance, conservative organizational culture—while offering practical and pragmatic advice on how to solve them. Approachable, light-hearted, and fun to read, but deadly serious all the same: A remarkable book.*

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Principal, Together London

*In Content Strategy at Work, Bloomstein collects the voices of content experts from across the spectrum to tell the stories of real-world projects. Content strategists working on interdisciplinary projects will find a world of experience to draw on, and dozens of models for fruitful collaboration.*

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Content Strategist, Brain Traffic and author of *The Elements of Content Strategy*

*Content strategy is like butter. Bloomstein has described the process of content strategy in how it makes everything around the marketing “bread” that much better, from SEO to content management to social media. We are all indeed publishers, filmmakers, and broadcasters, but we must first have a clear and realistic content strategy. This book will tell you how to make that happen with amazing examples along the way.*

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Chief Innovation Officer, Mullen

*There are many books on the market talking about strategy and branding. Bloomstein succeeds where most fail Content Strategy at Work cohesively covers issues pertaining to strategic thinking and brand communication. The execution, artifact, and delivery system are given equal value to the ideas and thinking.*

**Sean Adams**  
Partner, AdamsMorioka and AIGA Fellow and President Ex Officio

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AMSTERDAM • BOSTON • HEIDELBERG • LONDON  
NEW YORK • OXFORD • PARIS • SAN DIEGO  
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Morgan Kaufmann is an imprint of Elsevier



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*Morgan Kaufmann* is an imprint of Elsevier  
225 Wyman Street, Waltham, MA 02451, USA

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The cover text is set in Geometric Slabserif by Rudolf Wolf, and DIN, designed by Albert-Jan Pool. The interior text is composed of Frutiger and Rotis font families.

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#### Library of Congress Cataloging-in-Publication Data

Bloomstein, Margot.

Content strategy at work : real-world stories to strengthen every interactive project / Margot Bloomstein.  
p. cm.

Includes bibliographical references and index.

ISBN 978-0-12-391922-9 (alk. paper)

1. Internet marketing. 2. Branding (Marketing). 3. Information technology--Management. 4. Web site development. 5. Web sites--Design. I. Title.

HF5415.1265.B575 2012

658.8'72--dc23

2011051520

#### British Library Cataloguing-in-Publication Data

A catalogue record for this book is available from the British Library.

ISBN: 978-0-12-391922-9

Printed in China

12 13 14 15 14 10 9 8 7 6 5 4 3 2 1

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# DESIGNING COHESIVE EXPERIENCES: INTRODUCING CONTENT STRATEGY TO DESIGN

## DERIVING DESIGN FROM CONTENT AT MOO

"They could be updated, moved around . . . you could pull out a specific card and stick it on your monitor. The brand guidelines were very much meant to be used—and they were meant for the whole company."<sup>1</sup> That's how Denise Wilton, the former creative director of MOO and moo.com, described the editorial and visual brand guidelines she developed for MOO, the charismatic custom printing company based in the UK.

Is there a place for high-quality paper stock and inexpensive, extremely small print runs in the \$100 billion global print industry? As the custom printing industry has commoditized low-cost, low-volume solutions—100 business cards for less than \$50? No problem!—MOO stands out for its cheeky, can-do value proposition. How? While its products offer value with fairly quick turnaround, they're often not the cheapest or fastest solution for the target audience, many of whom are freelancers who demand quick turnaround. Instead, MOO maintains its brand through peerless consistency and builds an enthusiastic following by ensuring the brand comes through in every touchpoint and interaction:

- Category nomenclature
- Gallery of audience submissions
- Calls to action
- Error messages, 404-page design, and metacontent
- Confirmation emails
- Product packaging design, inserts, and promo codes
- Tweets from @overheardatMOO

Spanning verbal and visual style and tone, those are just a sample of MOO's touchpoints.

Call it loyalty, call it love, but many of MOO's customers greet even the most mundane interactions, like confirmation emails, with glee, forwarding

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<sup>1</sup>Wilton, D. (12 April 2011). Personal interview.

them to friends and tweeting out quotes. Naturally, this free advertising only further bolsters the brand and company. Printing millions of cards every month and shipping to customers in more than 180 countries, MOO soon noticed more than half its customers lived across the pond. MOO responded by opening a US production facility in 2009 to meet the volume of orders coming from the US. The headquarters remain in London, and the voice remains distinctly British.

Brand loyalists are “in” on maintaining the magic of MOO. What’s the secret? They engage with a brand that never breaks character—ever. This all comes down to how the content and visual design (along with interaction affordances and features) all work together to maintain a cohesive voice and consistently manifest the same communication goals, or message architecture.

A message architecture is a hierarchy of communication goals; as a hierarchy, they’re attributes that appear in order of priority, typically in an outline. I usually focus on establishing three to five main communication goals, or big buckets of terms, and define them in as much detail as is necessary for the team that will use the document. In this chapter, we’ll discuss how visual designers and content strategists (and, later, copywriters) can apply a message architecture to develop a cohesive, consistent user experience.

In many teams, interaction designers and information architects also use the message architecture for cues to how they should organize and label sections or choose appropriate design patterns. SEO specialists also use it to ensure keyword recommendations reflect the brand personality, as you’ll see in Chapter 5.

The screenshot shows the MOO website homepage in a Mozilla Firefox browser window. The URL is "Hello, We're MOO | moo.com USA". The page features a navigation bar with the MOO logo and the tagline "WE LOVE TO PRINT". The navigation menu includes "Products", "Accessories", "Ideas", "Your Account", and "Ask MOO". A sidebar on the left contains a menu with sections: "The MOO difference", "About the company" (with sub-items: Hello, we're MOO, Executive team, Media coverage, Partners, Affiliate program, Press resources), and "Working for MOO" (with sub-items: Hello, we're MOO, Our values and You, What It's like to work here, Current positions). The main content area is titled "About MOO / Hello, We're MOO" and features a large image of a hand holding several printed cards. To the right of the image is a text block: "We love the web, but you can't put it in your pocket. The internet. You can't touch it, write on it or stick it to the fridge. You can't pop it in the post with a gift or hand it to a client. The web is great but it's still just ones and zeros." Below the image and text are two columns of text: "MOO makes life a little less virtual." and "The MOO team" (listing Richard Moross).



## Psst... StickerBooks are stateside ☆

<http://www.moo.com/blog>

about 10 hours ago via web  
Retweeted by 4 people

↩ Reply ↻ Retweet



**overheardatmoo**  
Overheardatmoo

*Moo.com, @overheardatMOO, and MOO's packaging all manifest the same communication goals: message architecture at work!*

Notice how the brand is simultaneously both empowering and responsive. MOO upholds these attributes consistently through a variety of tactics:

- Copy speaks in the first person and conversational sentence structures
- Imagery doesn't just show product, but people interacting with the product
- Emails and the website flaunt examples of customer work
- Copy in packaging and packing slips shares in the enthusiasm of getting new business cards

The creative direction in large part stems from the content itself, which has matured and grown into a more formal content strategy. Denise explained that the early impetus for MOO's creative direction came from a staple of its communication, the order confirmation email.

A confirmation email has few tasks to fulfill: tell the recipient that the company received their order, inform them as to what will happen next, and remind them not to reply to that account as it is likely an automated email. MOO takes this mundane, utilitarian communiqué a few steps further by seizing the opportunity intrinsic to unbranded content. This is the body of their order confirmation email (personal communication, 1 March 2010):

From: Little MOO | Print Robot <noreply@moo.com>

Hello

I'm Little MOO—the bit of software that will be managing your order with moo.com. It will shortly be sent to Big MOO, our print machine who will print it for you in the next few days. I'll let you know when it's done and on its way to you.

You can track and manage your order from the accounts section at <https://www.secure.moo.com/account>.

Remember, I'm just a bit of software. So, if you have any questions regarding your order please first read our Frequently Asked Questions at <http://www.moo.com/help/> and if you're still not sure, contact customer service (who are real people) at <https://www.secure.moo.com/service/>.

Thanks,

Little MOO, Print Robot

"The email from Little MOO is one of the first touchpoints after you place an order," Denise explained. "Richard Moross [founder and CEO] wrote that. He got fed up with automated emails that were really impersonal and wanted to bring a bit of personality to it. When I started, that was the one thing in place. Everything else came with that in mind." Denise joined when MOO was a startup and she wore multiple hats, extending the brand through design, copywriting, and community management. "For quite a long time, we didn't have a formal process, but as we grew and had other designers coming in, we knew it would be good—for *all* staff members. You want people to code in a certain way, send out emails in a certain way, and since we printed business cards, we documented the brand in that way."

Denise went on to compile a set of business cards that detailed the brand with cues for verbal communication, visual design, and interaction design. "The cards covered history, values, tone of voice, personality, grammar, color breakdowns, how

to use the logo, everything," she noted. "On top of that, there were more detailed guides for how to write for MOO and how to interact with the MOO community."

"Each card in the set worked either as a standalone piece of information, or formed part of the larger piece, the idea being that anyone who needed it could pull out a relevant card and stick it to their monitor to guide them. But each card was written as a standalone piece, so it didn't matter if you got them mixed up. If you were a designer, you could pull out the relevant cards, or if you were a writer and just needed some writing guidelines, you could pull out those cards. They could be updated and moved around, and they were meant for the whole company. They were very much meant to be used." We've all encountered the alternative, as had Denise. "Otherwise, what happens with brand guidelines is they get written . . . and just shoved in a drawer."

Consider how MOO's example mirrors the growth, energy, and opportunity in many areas of the web industry. Are you helping to relaunch a company that has gained some traction and visibility, and now needs to realign its brand, print collateral, and web presence with how it sees itself—and how it would like to be seen? Or perhaps you're in-house, managing marketing for a growing company, helping to launch the next product or reach the next round of funding, all the while grimacing over "cobbler's children" remarks? MOO demonstrates how a brand can hone its consistency over time, even after a period of more organic growth, through two key factors that inform both content and design:

- A single message architecture, stemming from the Little MOO confirmation email, drives all tactical components of communication: visual, verbal, and interactive
- One set of brand guidelines applies to the entire company

In this chapter, we'll deconstruct MOO's approach to design and content strategy through the application of a message architecture. It can add to what you may already explore in a creative brief, or fuel communication with your client that other deliverables and activities manage to sidestep. Either way, if you're a designer, creative director, or someone who manages designers, welcome. This chapter's for you.

## **WHY BRING CONTENT STRATEGY INTO THE TEAM?**

In many organizations, new projects are motivated by design—at least on the surface. Agencies know this well: prospective clients cast out RFPs in search of a new look-and-feel or a "user-friendly interface." Internal creative services and marketing departments may get wind of new initiatives:

- We're launching the new product and the team wants something that looks slick and clean, not too cluttered. We want white space, but we need to still include all the current marketing copy.
- Corporate sustainability and social responsibility has been under attack, so we need to put a more caring, committed face on it. And design a template for a blog!
- We're going to start shooting video of employees talking about the culture here, so we need to design a backdrop and intro graphics.
- Everyone thinks we're old and can't react as quickly as the competition. We need to look hip, for both shareholders and recruiting! Use more lime green.
- Everyone thinks we're too risky and a bad investment. We need to look more conservative, for both shareholders and recruiting! Use more dark blue.

These expectations put a lot of demand on you, the designer—especially as they're vague, subjective, contradictory, or hard to quantify. Just as project managers and analytics gurus know if you can't measure it, you can't manage it, you're in a similar quandary: if you can't concretely quantify and define “more conservative,” you can't deliver it or know when you've accurately communicated it to mirror the concept imagined by your client—or clients. If you don't know what they really want, how will you know when you've achieved it? “Dark blue” isn't a communication goal.

### ***IF YOU DON'T KNOW WHAT YOU NEED TO COMMUNICATE, HOW WILL YOU KNOW IF YOU SUCCEED?***

This is where content strategy can help. Though content includes more than just words, many content strategists focus heavily on verbal communication, at least as a starting point. Use this to your advantage if you're a more visual person. Why? For one, your client likely communicates in words; meet them on their turf. Send out a content strategist as the advance guard, the scout, the one-man recon team, and watch the magic happen. You'll save time, creative energy, and budget, to do what you *really* do best. As Erin Kissane writes, “Language is our primary interface with each other and with the external world.”<sup>2</sup> Let's play to our strengths and employ that interface.

Of course, creative briefs can be a step in that direction. They typically attempt to document the purpose and business goals of an initiative, along with technical specifications. Unfortunately, many agencies omit the area in which they could likely have the greatest impact: an initiative's communication goals.

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<sup>2</sup>*The Elements of Content Strategy (A Book Apart 2011).*

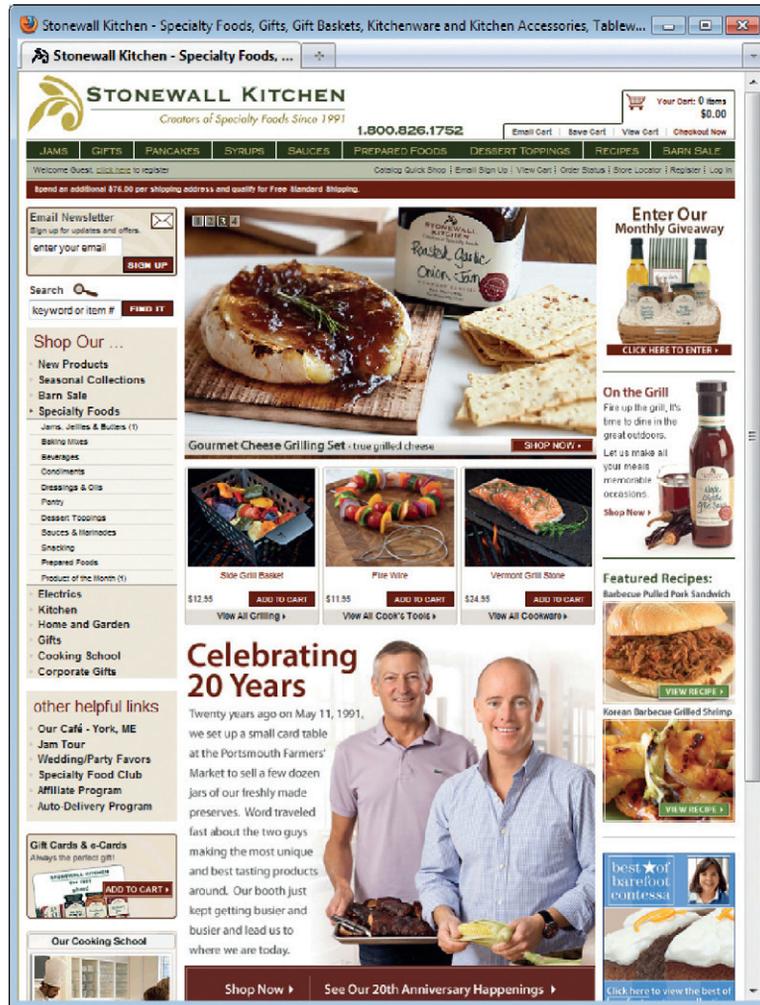
Some larger strategy consultancies address this by asking brand specialists to hone the messaging in more brand-driven experiences, though they often fall down when it comes to articulating brand principles through the information architecture of massive, content-rich websites. On the flip side, many smaller agencies don't have these specialists or design processes to even support thinking like this. In both scenarios, content strategists fit into that void by translating high-level business and brand guidelines into actionable messaging priorities, all while identifying hot-button communication needs and figuring out how to maintain the experience over time.

Your content strategist can start by engaging the client around their communication goals and priorities—and you can't have one without the other if you want to establish a clear value proposition for the brand. Why does prioritization matter? It's rare for initiatives to have a single purpose or stakeholder; that's why "this too!" is the battle cry of so many departments jostling to have their content dominate the homepage, breaking templates with countless content modules.

On the next page, consider the homepage of Stonewall Kitchen, a purveyor of specialty foods produced in Maine and available online, by catalog, and in retail stores. Stonewall is known for its jams and condiments that seem to capture the breeze and bustle of a farmers' market in little jars with seemingly handwritten labels. Buy a jar of Wild Maine Blueberry Jam, and you'll spread rich flavor on tomorrow morning's toast—and buy into a more relaxed, coastal lifestyle set against a backdrop of sun-bleached curtains and whitewashed porches. It's aspirational, but inviting—except if you attempt to do that through the company's website.

StonewallKitchen.com doesn't offer a clear value proposition because there's no evident hierarchy of communication goals, at least not in how the website presents content to its audience. Is it most important to convey the brand's product range? Probably not, because the product navigation appears in a smaller point size and lower contrast than the headline about the monthly giveaway. Is it important to convey the brand's breadth beyond just food? The page title metacontent lists "kitchen accessories, tableware, home and garden décor and accessories," and those characters are valuable real estate—but the design doesn't speak to those goals; none of the rotating images contain "home and garden décor and accessories," and the cooking school only appears far down the page. Is the brand's heritage important? Perhaps. The biggest text on the page reads "Celebrating 20 Years" but unfortunately it's buried more than halfway down the page.

No content strategist? That's okay. Just because I'm saying a content strategist does this doesn't mean that brilliant teammate with the great shoes is the *only* person who can do it. If you can't find someone to fill that role, you can adopt some relevant techniques to add this perspective yourself.



*StonewallKitchen.com is crowded with competing features, images, and content, the result of unclear communication goals.*

Does Stonewall Kitchen want to be perceived as enduring, experienced, and diverse? Or is it more important for their audience to see them as focused and premium, an inspiring one-stop shop for creating a picket-fence lifestyle with content about entertaining with fresh farmers' market vegetables and jarred jams?

Before talk of new content, one thing would really help StonewallKitchen.com: a clear hierarchy of communication goals. Enter the message architecture, which MOO manifests so well.

## HOW DOES MESSAGE ARCHITECTURE DRIVE THE CONTENT AND DESIGN?

Let's look back at MOO to understand how communication goals can inform the content strategy—and therefore, all the tactical decisions of content types, style tone, visual design, typography, color, etc. This is more difficult with Stonewall Kitchen, whose online user experience lacks a consistent personality and evident communication goals. But by looking across all of MOO's channels and touchpoints—the many ways its target audience encounters the brand—we can reverse engineer a message architecture from their work.

As we previously discussed, a message architecture is an outline or hierarchy of communication goals that reflects a common vocabulary. Working backward from the end product, we can envision that it might look like this for MOO:

Cheeky  
 Witty and fun  
 Young without being childish  
 Customer oriented and responsive  
 Approachable, friendly, welcoming  
 Championing and empowering  
 Helpful  
 Accessible

Note that a message architecture differs from brand values, which speak more to the company's credo than to how it should communicate with its target audience. Ideally, transparency is a virtue, but values and communication goals don't always align—or may not always be relevant to each other. These are some of the qualities that MOO mentions in its brand values:

- Design
- Innovation
- Community
- Excellence

These are the qualities it prizes as an organization. They may inspire employees and even topics on the website, but they don't indicate priority.

On a similar note, message architecture can reflect a mission or vision statement, but it goes beyond either element to offer a strategy that

is both *actionable* and *specific to communication*. This is MOO's vision statement: "Great design for everyone."

Again, it's inspiring, but not an actionable directive.

See how the message architecture captures qualities MOO wants to convey, not the points it wants to make in copy or word-for-word phrasing? On the website for a law firm, this is the difference between saying "we're serious and mature" and *communicating* it by using more formal language, a serif typeface, slightly longer sentences, and images of associates in gray suits with traditional tailoring. If the law firm's message architecture includes the communication goal of telegraphing maturity—perhaps captured in a bullet as "mature, wise, unflappable"—those communication goals would drive the firm to adopt features that reflect a measured approach to new technology. A module that pulls in an unfiltered RSS feed doesn't seem savvy and wise; it seems reactive and may make the brand look like it's clawing for relevance with a whiff of modernity.

In addition to prioritization, concrete and shared terminology gives a message architecture its value. That means getting past edicts like "make us look traditional!" when one stakeholder's "traditional" is another's "experienced," or "conservative," or "American." When your client asks for traditional, don't come back at them with a muted color palette; put on your content strategy hat—or send in the content strategist—to keep digging. Why do they want to seem traditional? Is there a bigger challenge? Does the competition paint them as young and untested? The communication goals are in there somewhere.

### ***ESTABLISH A MESSAGE ARCHITECTURE THROUGH CARDSORTING***

I typically approach the message architecture in the context of a project kickoff session, whether I'm meeting with an internal team or external client stakeholders. First, I'll probe their vision for the initiative: why this, and why now? What do they envision a successful future to look like, and how is it different from their present experience? Then we'll move into a facilitated exercise. I've honed this cardsorting exercise over the past decade to help my clients establish and prioritize their communication goals. They're the people who do the real work, much like gym members work with a trainer or patients engage a therapist.

Not that consulting and content strategy are anything like psychological counseling. Oh, no.

This exercise encourages tactile engagement with brand attributes: stakeholders are literally picking up adjectives on index cards to reorganize what they feel is most important to communicate. It also helps us identify conflicting priorities; after all, the new blog, website, campaign, or logo can't communicate both modernity and tradition—or can it? These are the other key benefits:

- Engages stakeholders in a tangible, hands-on way
- Encourages debate and conversation (“what do we all mean by ‘innovative’ anyhow—and is that the same as being ‘cutting edge?’”)
- Identifies points of disagreement, team politics, and any history of pain points
- Prevents seagulling<sup>3</sup>
- Forces prioritization and tough choices
- Encourages ownership and investment, long after the consultant team has gone away
- Offers stakeholders a sense of accomplishment early in the project
- Minimizes work and action on inaccurate assumptions

Overall, the goal of this activity is achieving consensus and clarity around communication goals, the foundational elements that inform visual design, content strategy, editorial strategy, nomenclature, and architecture.

### ***Tools, materials, and roles***

You can conduct this activity over the phone, but you and the team will achieve greater success if you meet face to face and work with actual cards. You'll need a deck of about 150 index cards, labeled with adjectives most applicable to the client's industry—and maybe a few ringers. You'll also need a large table where the stakeholders can all stand around one end, and chairs so that the rest of your team can remain seated.

These are the adjectives I typically use; I've developed this set through experience with clients in a range of diverse industries, including fashion and finance, recycled packaging and waste management, and medical device manufacturers and the PR companies that always seem to go to bat for them. Though every business is unique, their communication needs are often quite common. (Don't tell your client that.) I typically presort this group to filter out the small handful that might be distracting to the client or potentially inflammatory in that context.

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<sup>3</sup>When a new stakeholder or a previously-MIA CEO suddenly comes in and . . . expresses their perspective, changing the project direction when you're almost through the budget and timeline. You know, the old swoop 'n' poop.

- proactive
- trusted
- cool
- narrow
- slick
- value-oriented
- actionable
- tailored
- down-to-earth
- practical
- custom
- innovative
- hip
- conservative
- urban
- customer-oriented
- market-driven
- professional
- technological
- aggressive
- visionary
- white collar
- tactical
- responsive
- consistent
- traditional
- savvy
- eclectic
- broad
- high-quality
- friendly
- fun
- the thought leader
- current
- approachable
- welcoming
- blue collar
- strategic
- premium
- classic
- cutting edge
- reactive
- national
- detail oriented
- timeless
- elegant
- accessible
- responsible
- sexy
- high-level
- bleeding edge
- tried-and-true
- rural
- in touch
- wise
- empowering
- assertive
- informal
- progressive
- modern
- expensive
- authentic
- flexible
- international
- formal
- fair
- trendy
- simple
- casual
- historic
- serious
- regional
- reliable
- efficient
- diverse
- elite
- relationship-oriented
- driven
- leading edge
- experienced
- smart
- focused
- structured
- timely
- community-building
- pioneering
- lavish
- global

Add to this three label cards:

- Who we are
- Who we'd like to be
- Who we're not

Allot 45–60 minutes during the kickoff, depending on the number of participants and their decision-making abilities. In general, the activity works best with no more than six client stakeholders and one facilitator, who may double as note taker. Who's the facilitator? As a content strategist, I usually wear this hat, but anyone can do this. If you wear many hats as a

communication-focused designer or creative director, embrace the hat head! Titles are less important than action.

It's important that you involve all the stakeholders in the room—don't let anyone hang back like a shadowy presence, ready to swoop in and derail activities. Instead, involve everyone by engaging the wallflowers and working with the project manager ahead of time to ensure the kickoff schedule brings the main decision makers into the room at this point. If there are other people who will be involved in project execution but who don't have a stake in the project's goals, explore ways to excuse them for this session, because they may be a distraction or derail progress. When people hang back, they may not fully support decisions of the group and may raise concerns after the fact. Conversely, when members of the group mentally check out or excuse themselves to "chime in later" after others have started sorting the cards, they may subconsciously elevate themselves into a position of approval or disapproval.

Remember how we said you need a table with room for the stakeholders to stand, but with chairs so that the other members of your team can remain sitting? That's by design. Beyond the stakeholder participants and facilitator, I prefer to limit interaction from other team members in the room. Intervention can distract or influence the clients' open discussion and debate. Instead, other team members should stay focused, avoid side conversations, but be careful not to hover. Body language matters: while encouraging the stakeholders to stand, as a facilitator, I try to remain sitting during this exercise. By standing up, we can seem overbearing—not ideal when we're trying to encourage discussion in an open manner.

### **Step one: categorize**

If you're the facilitator, kick off the exercise by introducing this approach for gleaning a lot of brand information very quickly. Though your client may have already provided some information on brand values, this is an opportunity to hear it in their own words—also a key point if you're serving an internal "client" at an organization at which you both work. This is their chance to separate communication goals from brand values, so have at it. Mention that you'll document as you go and summarize in the message architecture. Divide the stack of prefiltered cards between the participants or toss them across the table, and explain that they need to divvy them into three categories:

- Who we are: "How do you think your brand is currently perceived?"
- Who we'd like to be: "How would you *like* the brand to be perceived? What are the aspirational qualities you want to own in the hearts and minds of customers,

prospects, and competitors?" Remind them that this initiative—whatever it is—is aspirational, so this is their chance to grow.

- Who we're not: "Which terms don't you want to associate with your brand? Which terms just aren't relevant, or maybe better apply to a competitor?"

Mention that some cards may be ringers and inapplicable to their brand. However, most of the cards will fit into one of the three categories. Make space for the three categories by laying out cards to label them across one end of the table, then let your participants start distributing the remaining cards.



*Cardsorting begins with stakeholders categorizing adjectives to describe their brand: who we are, who we're not, and who we'd like to be.*

After you explain the directions, step back and tell them to go on gut instinct, get to work—then hush. Your presence may assert false time pressure, and they need to discuss among themselves. This portion of the exercise should take no more than 15 minutes, but the pauses, hesitation, and snap decisions are all worth noting. Jot them down. Do participants seem to giggle or grimace over certain terms? Take note. There's probably a backstory worth discussing—like a project that had similar goals or politically charged lingo. Avoid those minefields by identifying them now.

If participants have questions about any of these categories or the terms, try to push them to come up with their own answers or interpretations—"what do you think it means?" Some terms are intentionally ambiguous to invite discourse. Others, like "cutting edge," "leading edge," and "bleeding edge" may be close in meaning but expose nuance shared by your

stakeholders. Let them clue you in on the difference; this is where denotation and connotation come into play.

After 90% of the cards are in categories, if it's getting tough, go ahead and dig into those remaining cards. If they're not ringers, ask the participants how individual cards fit into the developing schema. You may want to point to similar terms that they easily categorized, and capture discussion about why seemingly similar terms didn't work.

Wrap up this step by asking a few questions, both for their answers and how participants answer them. Favor open-ended questions to encourage discussion; here are some examples, some of which use seemingly obvious pairs:

- "I see you have 'traditional' in this column, but not 'conservative.' How come?"
- "Could you tell me more about why you put 'cutting edge' in this category?"

- "What were you thinking when you put 'cutting edge' here, but 'bleeding edge' there?"
- "It seemed like you hesitated when you put 'minimal' in this category. Why?"
- "You put 'strategic' and 'tactical' in the same category. Are they opposites, or are they not really on the same continuum? What was your reasoning there?"

Take note of how participants respond; you'll want to know if their culture perceives a word like "innovative" as trite or overused so that you can avoid it in copywriting down the road. Also capture the unity and consensus.

Some terms will seem like obvious pairs or clear opposites. You may want to ask follow-up questions about these cards, like "Why did you put both 'traditional' and 'modern' in the 'we'd like to be' column? What's that about?"

- bleeding edge vs. cutting edge
- blue collar vs. white collar
- casual vs. formal vs. professional
- cool vs. hip
- friendly vs. aggressive
- global vs. national vs. regional
- hands-on vs. tactical
- assertive vs. aggressive
- tactical vs. strategic
- innovative vs. pioneering
- modern vs. traditional
- premium vs. value-oriented
- savvy vs. smart vs. wise
- strategic vs. tactical

### Step two: filter

After digging into their categories for a few minutes, move on to step two for the next 10–15 minutes. Ask the stakeholders what qualities they want to hold on to—figuratively and, for now, literally—as they move forward. What does the company or brand currently do well, and what would they like to be when they grow up? Are there qualities in the future that will trump or subsume present qualities—like if they'd like to be seen as "international" instead of just "national"? Ask them to keep this in mind and move the appropriate cards from the "we are" column to the "we'd like to be" column. You can gather up the cards in the "who we're not" column; we don't need to focus there anymore.

*In step two, stakeholders filter and reorganize the cards to focus on how they'd like the brand to be perceived through the work you're doing.*



As with the first step, only jump into the process if it seems to be suffering or slowing down. You're there to ensure the exercise moves along, but realize it will also pull itself along at its own pace. Don't belabor this step; after just a few minutes the participants will thin out their "current state" column and will likely have a pretty dense "future state" column.

### **Step three: prioritize and close**

Now focus just on the "we'd like to be" column, and sweep the other cards from the table so that participants can play with proximity and space to explain relationships. Ask the participants to check out what's left on the table. If they're comfortable with what's there, remind them that to do an effective job of communicating, we have to make tough choices about how we focus our attention—after all, that's how their target audience will eventually focus *their* attention. Time to make the tough strategic choices; later, you'll be able to ground tactical choices, like what really deserves homepage real estate, on these decisions.

Not everything can be top priority, so ask them to rank the attributes or groups of attributes. Some natural groups might start to form—maybe a set of cards just refers to how they have to get in the door or their business culture, or how they'd like to be perceived by investors. As these groups start to reveal themselves, have them push those cards together. You may need to take a more active role at this stage to help them see those groups.

After three to six groups emerge and the stakeholders are discussing those clumps, have them loop you in to the conversation. Time to prioritize the goals and then tell you the story of those aspirations. What comes first, and what's the connection with the next group? Take this all down, in either an outline or mind map, and then congratulate the team. They did what you needed them to do: they achieved consensus on and clarity around a concrete hierarchy of communication goals with a vocabulary that they and you understand. What comes next? Explain that you'll go back and synthesize this list into a prioritized message architecture that will be a foundation for all the visual and verbal communication in the project.

### **QUICK AND DIRTY: ESTABLISH A MESSAGE ARCHITECTURE WITH A VENN DIAGRAM**

Another approach to prioritizing communication goals employs a Venn diagram and whiteboard. This method is less hands-on and may not deliver the detail and specificity of cardsorting, but it's valuable for stakeholder

As you well know, all the divisions in the company can't have a spot front and center on the homepage, and not all new products deserve the hero shot on section landing pages. Force your client to prioritize now, when their communication goals are just cards on a table, without ties to departments or industry trends. You'll save time, budget, and effort later on when they have to confront tough decisions. A message architecture can help them—and you—say no, with the confidence that they'll stay true to their own priorities.

teams that may not have the patience or brand subject matter expertise to engage in cardsorting.

### **Tools, materials, and roles**

At a whiteboard showing two large circles in a Venn diagram, arm your stakeholders with several dry-erase markers. As with the brand attributes cardsorting exercise, you'll want one facilitator to do most of the stakeholder engagement, but let your stakeholders do most of the work and discussion so that they're invested in their brand and communication goals. As another variation on this exercise, you can ask the participants to write on moveable sticky notes instead of directly on the whiteboard so that they can more easily rearrange the brand attributes.

### **Step one: define the brand offering**

Label the two circles in the diagram:

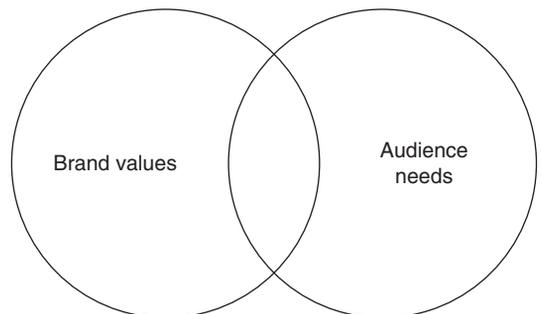
- Brand values
- Audience needs

Ask your stakeholders to describe everything their brand offers or would like to offer on an *emotional* level. In other words, if it's a company that sells windows or locks or data backup systems, don't focus on the products; instead, stakeholders might mention things like "security," "confidence," and "trust." Ask the participants to start listing those qualities that the organization offers or would like to offer in the "Brand values" circle.

If you've got the brand attributes cards handy, they can be a useful starting point to help guide the activity if stakeholders are more reserved. Depending on the organization and industry, expect participants to list a variety of qualities and attributes:

- experience
- expertise
- always being on time
- fun
- tradition
- heritage
- innovation
- service

*The overlap of brand values and audience needs informs the project's communication goals.*



- creative ideas
- empowerment
- variety
- consistency

After they've filled the circle or after about 10 minutes, dig in with a few questions. As with the cardsorting exercise, you may find some obvious conflicts to discuss:

- "You say you offer both 'consistency' and 'variety.' How is that possible? Did different people add those terms?"
- "How do you offer both 'tradition' and 'innovation,' or are you trying to move away from one and replace it with the other?"
- "You listed both 'coolness' and 'trendiness.' Are they the same, or what did you mean by those terms?"

### *Step two: define the audience needs*

Now ask your stakeholders to stop focusing on their company and offering, and instead focus on their target audience. You may be able to inform this with some baseline user research if it's available. Using the "Audience needs" circle, ask them to start listing all the qualities that their target audience wants—not just from them, but in general.

Consider the target audience for MOO. One segment comprises freelance artists, designers, and other "creative" types. What might they want?

- Consistent branding
- Visibility to new patrons and customers
- More time to focus on work instead of accounting, invoicing, and bookkeeping
- More time to focus on doing work rather than pitching it
- Immediate customer service, even late at night and on weekends
- High-quality, low-cost collateral
- Automated, full-service solutions that don't require human intervention
- Ideas for how to stand out
- Inspiration for innovative personal branding

After your stakeholders have built up a list, encourage them to take a step back. Obviously, some of the things their audience may want (like more time for work) aren't things they can provide through their products, services, or brand; erase those, or remove the relevant sticky notes. Ask them to take a look at what remains.

### **Step three: focus and prioritize**

Do the audience needs that remain on the board correlate to any of the brand attributes they listed in the first circle? In this example, qualities like “consistency,” “empowerment,” “creativity,” and “service” fit the bill. Move those qualities to the overlapping region of the circles. Finally, ask them to prioritize the qualities that fall into the overlap. What's most important to communicate—what will get them in the door with their audience? And what other attributes will bolster that promise?

As with the cardsorting exercise, encourage your stakeholders to group related terms and then tell you the story of those relationships and the story of those brand aspirations. Ask them what comes first, what will get them in the door, what's the highest priority—and then what comes next? Capture this in an outline or mind map and congratulate the team on their work. Moving forward, explain that you'll translate this into the message architecture that drives subsequent tactical decisions in the initiative.

### **DELIVERY**

Though you may need to clean up specific language or add color commentary, the message architecture that you deliver will likely look very similar to these final notes, especially if you captured them in an outline. As the first deliverable after the kickoff, I usually find it's useful to remind the client how we created it, and that I based the document on *what they told me* about their brand and communication goals. There shouldn't be any surprises here. Then I ask them two big questions: did we hear you right? And is anything missing or in the wrong order of priority?

As you present the message architecture, remind your client of its role: this will inform all the subsequent tactical decisions in content and design. And while the specific words in it don't imply specific copy—any more than its black text on white paper will necessarily drive the design—it is important to make sure we get it right so as to help ensure everyone's on the same page moving forward.

### **OKAY, BUT WHO'S GOING TO PAY FOR THIS?**

When you take your stakeholders through a process to create a message architecture, you can open the lines of communication, encourage new discussion on their brand, and bring greater clarity into your creative

process. As your stakeholders wrestle and commit to prioritizing their communication goals, they may be saving you iteration on far-flung concepts that they'd only end up throwing out. Upfront investment in message architecture can really help and streamline the design process. But won't it elongate the timeline and require additional budget?

Surprise! It's cheaper to iterate in Word than in Photoshop.

No. Hear that echoing from the halls of agencies large and small? No, no, no . . . that's because whether the design budget is a few thousand dollars or \$50,000—or more, you lucky person, you!—if you can funnel off as little as a few hours to content strategy, you can save exponentially more in the design process. In a nutshell, spend money to save money. Here's how: rather than creating moodboards or Photoshop comps for initial rounds of conceptualizing, you can use a message architecture to drive the discussion more quickly and precisely. That's time you can also invest in honing the details as you get to a single design direction more quickly.

### **PULLING IT ALL TOGETHER WITH CONSISTENCY— AND COPY**

Consider the impact of starting with a message architecture. A month after the kickoff, as you start building comps on top of wireframes, your stakeholders shouldn't be debating personal preferences in a color scheme or your choice of typeface. Instead, elevate their feedback and focus the discussion around your solid reasons. You'll be able to substantiate your decisions on a more objective basis. Take a look at the next page. Consider, for example, how you could translate the message architecture for a financial services brand.

As you explain to your client, you chose Sabon for the headlines in the comps because it best communicates the conservative qualities your client said were most important to communicate. It's a classic typeface, but not as commonplace as its relative, Garamond. It combines well with Frutiger, which you're considering for the subheads, as it's approachable and friendly without being folksy. They're reading real copy in that typeface, because your content strategist drafted sample copy that also manifests qualities from the message architecture: it uses clear, direct sentences that all start with a verb in active voice and exude confidence by addressing the audience in the second person. The wireframes behind each comp reflect similar thinking. The organization fits with users' expectations, a faceted navigation system invites the target audience to learn as they browse, and nomenclature is simple, common, and inviting. The message architecture bolsters

## Message architecture

As your website redesign moves forward, we'll build on a foundation of key communication themes that appear here in order of priority. These themes are aspirational: they embody where the brand needs to go, not how it is currently perceived. The terms used in this message architecture don't imply actual copy to be used in the site, though they capture the key messages we'll try to communicate through content and design.

- Conservative, mature, and unflappable
  - Experienced and wise; has seen trends and economic cycles wax and wane
- Anticipatory and proactive in customer service and care; never reactionary
- Formal but not stiff
  - Comfortable with process

### Partial implications to visual design

- Sabon for headlines, subheads, and pull quotes (treat text as image)
- Enough white space so as to give the eye space to rest, but not so much the layout appears minimalist or sparse
- Imagery of middle-age and older people working in understated but polished business casual attire (sweaters over collared shirts), both working separately and engaging with clients

### Partial implications to content strategy

- Traditional style with accepted modern spelling (e.g., "email" not "e-mail" and spell out acronyms)
- Formal punctuation (e.g., end punctuation in bulleted lists)
- Slightly longer sentence structures
- "Please" and "thank you" in instructional copy and calls to action
- Content types like client testimonials
- Longer-form executive bios

your comps and each one hangs together, cohesive and airtight in its interaction design, information architecture, copy, and look-and-feel.

If you've long hung your hat on *lorem ipsum*, now's the time for a team hug or *Kumbaya* singalong: you're not alone in the wilderness. Content strategy can make your life easier. Drum circle, everyone! Hurry!

While this is just a selection of the many tactical ways design and content strategy could manifest that abbreviated message architecture, you can quickly see how it could translate to cues in both look and feel as well as style and tone. There's an enormous benefit to the team: it's much easier to defend a unified, holistic *concept* than for any part of the team to separately defend discrete choices in color, imagery, diction, or content type.

*E pluribus unum*. Or, as Melissa Rach, Brain Traffic's vice president of content strategy, notes, "We are not competition; we are a complement." And when design and content exist in complement to each other, a cohesive, inseparable gestalt makes for a more compelling user experience.

## CASE IN POINT: A USER EXPERIENCE WITH TRADITIONAL CONTENT TYPES

The content strategy and visual design of Harvard University's Alumni Club is a wonderful example of that complementary relationship.



*The Harvard Club of Boston, the only Platinum alumni club of Massachusetts. Even the chandeliers support the message architecture!*

While some parts of the design, such as the use of crimson, take a cue from Harvard's style guidelines, other elements clearly speak to shared communication goals. Imagery depicts the grand architecture and opulent hospitality, rather than members networking. Small caps and a sprinkling of italicized typography are elegant without being heavy-handed. Themes of exclusivity and luxury come through in content types throughout the site, such as an FAQ on reciprocal clubs, detailed dining menus, and a photo gallery of catered events. The copy telegraphs these qualities as well:

"Whether it's a once-in-a-lifetime family occasion, the punctuation mark on a career milestone, the chance to listen to a brilliant scientist or scholar, or a game of squash, there's no place quite like the Harvard Club of Boston. Independent, nonprofit, and dedicated to our mission since 1908, we're the only Platinum alumni club in Massachusetts. When you're done browsing our site, come in and see why."

Notice the longer sentences and details that describe a life of wholesome leisure, from a “career milestone,” not just a promotion, to “a game of squash,” not basketball or boxing, which the Harvard Club also offers.

### **TAKING IT FURTHER: DESIGNING FOR USER-GENERATED CONTENT**

It's easy to see how a single message architecture drives the design and content strategy of the Harvard Club's website. It incorporates traditional, common content types that don't challenge the design templates with irregularity or surprises.

But surprises, variety, and empty spaces where the audience expects copy—these are the challenges you embrace when you design experiences that incorporate user-generated content. Users might leave fields blank, fill them with obscenities, or fill them with obscenities they've carefully spaced out to avoid automated comment moderation. (Who devotes that kind of time and creativity to CNN.com article comments anyhow?) Some users draft detailed biographies for their profile pages, threatening character limits and patience, while others give us the silent treatment. It gets more interesting when we get to their avatars: your community might comprise suburban moms, new babies, and boats. And as it turns out, those boats are pretty active in the comments!

Upfront content strategy and the message architecture can help address both the issues with how users engage social features and how visual design and wireframes accommodate—and limit—the unknowns. Variety might be the spice of life, but it won't make your life as a designer any easier, no matter how flexible you envision your templates.

Consider all the variables that define specific content—even if we just limit it to a specific content type, such as a user profile:

- Size (headshot file size, dimensions, resolution; biography character count)
- Format (JPEG, EPS, PDF, DOC, etc.)
- Subject matter (user's headshot from the shoulders up, with a pet, with friends, life story, favorite quote, etc.)

Content strategy can anticipate—and accommodate and invite—the right types of user-generated content. Ancillary copy elements, such as instructional copy and field labels, help to set the tone of responses. Example or default copy and prefilled fields also help to set user expectations, while interaction design affordances can limit the structure of responses. While open text fields may welcome a variety of responses, structures such as top five pick lists and restricted taxonomies limit variety while still inviting participation.

What do we mean when we discuss the “right type” of content? “Right” varies by site or application, but it fits this profile: it conforms to social conventions and design expectations, breaking neither the usage guidelines or templates of the specific context.

Tufts University waded into this challenge in 2010. Building off the real-world tradition in which students pass candles up a hill to “Light the Hill” every year, an interoffice team worked with ISITE Design to create an online version for alumni. The Light the Hill website invited young alumni of the past decade to light a virtual candle and add their memory to a digital hill. Participants could reconnect with others while sharing content with the offices of advancement and alumni relations.



*LighttheHill.com invited young alumni to share their Tufts memories—clean memories of an appropriate length and structure—through an anticipatory content strategy for user-generated content.*

The stakeholder team initially hesitated about letting the recent grads post anything they wanted without moderation—but they also didn't want to hold their comments for review and delay the immediate gratification that could come with contributing. Content strategy helped allay some of those concerns.

Instructional copy helped to set the tone. "Reconnect and recall the events that defined your time here" began the central value proposition. "Share your memory and add your candle" was the primary call to action. This led to a field labeled "What's your favorite memory from Tufts?"

Alongside the field was copy that both provided a warning and helped establish rapport with the target audience. "Light the hill with your favorite memory from Tufts!" it began. "And if you recall a particularly chilly run, please, keep it clean." Like many prestigious institutions, Tufts University had an unsanctioned tradition of dubious distinction: the Naked Quad Run. An annual event, the Naked Quad Run didn't cloak its name in euphemism, nor did participants cloak themselves in anything, as they sprinted through a snow-covered campus on a designated night every December.<sup>4</sup> While the run may offer compelling memories, the stakeholder team didn't want the website to become filled with possibly offensive content. With a wink and a nod, they let users know what was acceptable and what wasn't.

Role model content also helped to set the tone. Before formally rolling out the site, the office invited participation from several trusted members of the target audience. At the official launch, their content was already populating the hill and demonstrating "appropriate" topics, level of detail, and character counts. That was key to successful implementation of the design: if comments were too brief, the experience might appear weak, but if submissions were too long, they would seem unreadable.

"By using the 'mavens' and seeding their example content, we set a bar for the tone and kind of content we were looking for," explained Courtney Mongell, associate director of communications and donor retention.<sup>5</sup> "We didn't know what to expect, but didn't want to restrict their creativity."

That thinking affected both the team's approach to governance and how they managed it day to day. Because they retained the right to review comments after posting, they rotated who was "on" to monitor comments each day.

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<sup>4</sup>Though school administration previously had sanctioned this event, University President Lawrence Bacow issued a statement in March 2011 indicating it would no longer be permitted. See <http://www.tuftsdaily.com/op-ed/nqr-reconsidered-1.2512697> and [http://www.washingtonpost.com/blogs/campus-overload/post/tufts-president-ends-naked-quad-run/2011/03/14/ABGnjcV\\_blog.html](http://www.washingtonpost.com/blogs/campus-overload/post/tufts-president-ends-naked-quad-run/2011/03/14/ABGnjcV_blog.html).

<sup>5</sup>Mongell, C., Nuscher, D., and Snitow, S. (4 March 2011). Personal interview.

"The user agreement set a really high bar for what would even cause us to get involved," commented Dave Nuscher, the director of advancement and editorial and creative services. "We got an email every time someone submitted a post, and there was only one post that even moved the needle a little bit." The content strategy was working.

"We saw some references to drinking and getting naked, but it was never inappropriate," added Samantha Snitow, the assistant director of young alumni programming. "But it's college. People get naked and drink."

(Parents: note, that applies to *all* colleges.)

(Mom and Dad: note, that totally did not apply to *my* college.)

So what did the Light the Hill content strategy entail? It mapped out a way to accomplish several key goals:

- Engage young alumni
- Build visibility within their communities
- Encourage content contributions
- Facilitate viral sharing

The tactics that addressed these goals emerged from a streamlined message architecture:

- Inspire nostalgia
- Offer relevancy and clear application
- Appreciate, support, and value alumni contributions
- Provide opportunities and unique access to diverse leaders
- Be fun

Interaction affordances also helped to constrain content while eliciting engagement. With a broad range of interests, majors, and extracurricular activities, Tufts students tend to join a variety of "affinity groups," their term for student groups. The stakeholder team wanted to collect this data in a semantically useful way that wouldn't break the design. ISITE's solution? Before adding their memory, alumni could list their "*three* main affinity groups" in text fields that used type-ahead autocompletion to narrow options as they began typing. Variations in spelling or issues like multiple names for the same organization didn't get in the way of data collection, and the design team could plan ahead for the longest possible character count.

"We've used the content a ton," Dave noted, describing the impact of the campaign. "Just after the site launched, we started working with a consultant

on annual giving. After three months, the consultant recommended that we needed to look at the nostalgia of our young alumni. Serendipitously, we had a bank of a few hundred quotes we could use from that group.”

Ultimately, the content strategy included several major components:

- Develop a plan to engage the target audience with content they create
- Identify and implement techniques to get appropriate and consistent content
- Determine an approach to governance
- Monitor the content over time

Consider the value of collaboration between content strategy and design in this initiative. Not only could the design team craft an experience that anticipated specific content types in precise character counts, but they could also demonstrate that variety to the stakeholder team in realistic mockups every step of the way. Real content made buy-in that much easier: predictable inputs are the stuff of real copy, not *lorem ipsum*. The stakeholders could also set internal expectations for user-generated content and exert some control over it, while building a workflow and response plan to accommodate the “what if” scenarios.

As the stakeholders at Tufts knew, recent college grads have a unique capacity to offer colorful insight from the real world, especially if it features memories of a certain late-night run. In many ways, the Light the Hill initiative demonstrates the value of content strategy in the real world, in which proactive “what ifs” are always better than a screeching, collective “what now?!” And that’s central to how content strategy adds value to design. It minimizes uncertainty and improves the experience for everyone: you, your clients, and ultimately, your end user.