



# Content STRATEGY



START HERE

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## START HERE

Use this worksheet to help you prepare for exceptional content strategy outcomes.

# LIST YOUR GOALS FOR CONTENT STRATEGY OUTCOMES

**1** What is the business trying to achieve? For example, are you looking to increase targeted traffic, improve clarity and reduce confusion, or inspire a specific activity?

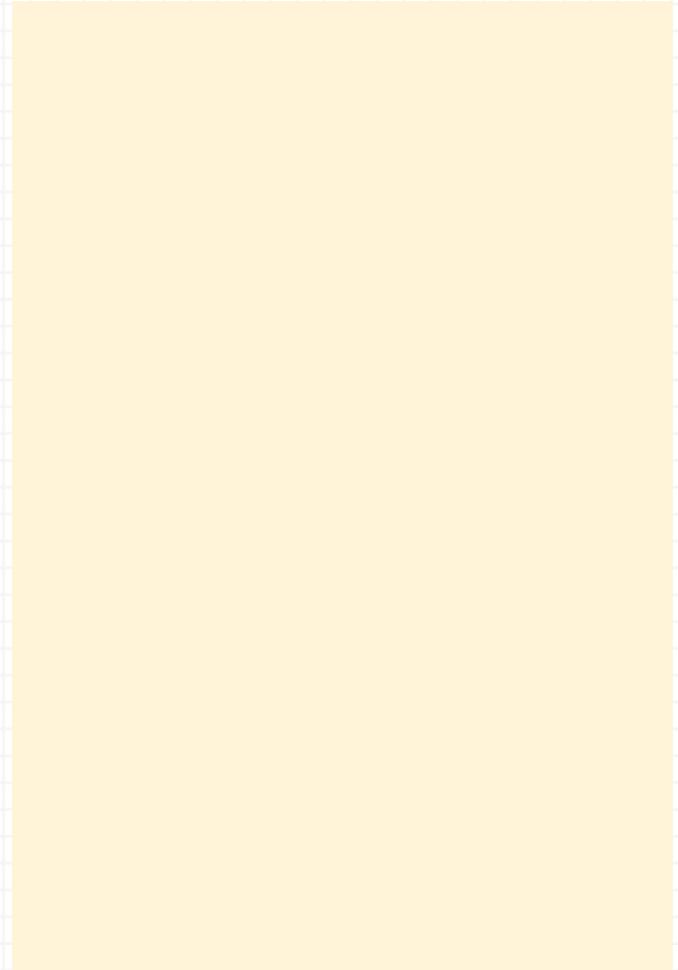
**Primary Goals** for the Business

**Secondary Goals** for the Business

**What is the audience trying to achieve? Do they want to find things more quickly? Know how to accomplish something? Make something easier to understand?**

Primary Goals for the Audience

Secondary Goals for the Audience



**Draw a line** between each of the goals for the business that align with the goal for the audience. Make a note of any that don't match up.



# OUTLINE YOUR LIMITATIONS (AND OPPORTUNITIES!)

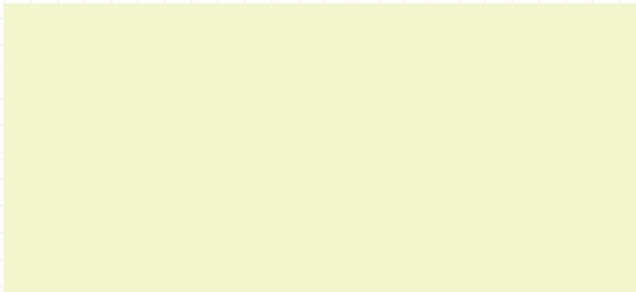
## 2

Every project is defined by people, time, and resources, including budget and technology. Make a list of your limitations and opportunities.

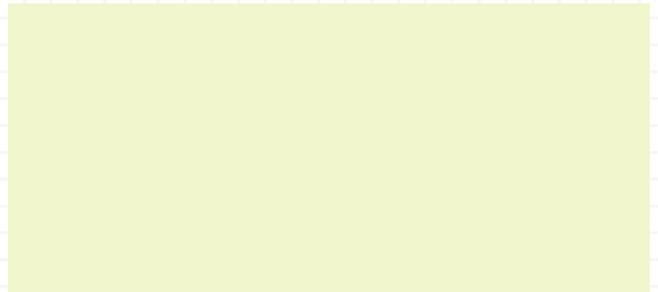
Deadlines (upcoming events, PR, product launches that drive due dates):



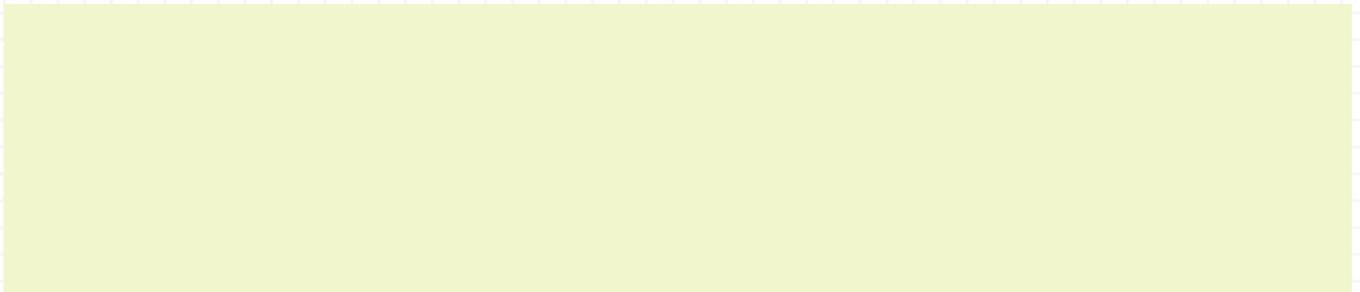
Budget for  
content strategy creation:



Budget for  
ongoing content management:



Software needs (content management systems, project management tools, etc):



People needs (who will help develop the content strategy, execute, and manage the content over time?):

**NAMES**

**CONTENT STRATEGY**

[Empty box for names]

**PROJECT MANAGEMENT**

[Empty box for names]

**WRITING, EDITING**

[Empty box for names]

**REVIEWING, APPROVING**

[Empty box for names]

**DESIGNING, DEVELOPING,  
INFORMATION ARCHITECTURE**

[Empty box for names]

**USABILITY TESTING**

[Empty box for names]

**ONGOING CONTENT  
IMPROVEMENTS AND MANAGEMENT**

[Empty box for names]

**OTHER LIMITS AND OPPORTUNITIES TO CONSIDER:**

**HINT**

Your final content strategy should outline a plan that will drive outcomes using the resources that you have or can acquire.

# DESCRIBE YOUR AUDIENCE

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**Describe your audience in detail. Your target audience is not simply a list of demographics. They are real people who need you the most. For more details on determining your audience, see Pybop's Audience Analysis Worksheet.**

**PRIMARY** Audience

**SECONDARY** Audience

**TERTIARY** Audience

**OTHER** Audiences to Consider



# ACTIVITY

**Create personas for your audience and walk them through your current or planned experience with real tasks to accomplish.**

# ASK FOR A FRESH PERSPECTIVE



Ask someone who is not very familiar with your brand, user experience, and/or content to review and give you a different point of view.

Ideas from outside the industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Ideas from inside the industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Ideas from a content strategist: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Did you find common themes among the different perspectives? Is there a need you didn't know needed solving? Add it to your **Business and Audience Goals** list.

## HINT

People who are very familiar with your brand have legacy knowledge and are great at maintaining consistency. Sometimes, a fresh perspective is also needed to solve (and spot) obstacles.

# PREPARE THE TEAM TO TAKE RISKS, TEST, AND ADAPT

## 5

**Content strategy is about trying new things, testing, learning, and trying new things again. Talk to your team about these ideas:**

- Let's push new ideas in a controlled testing environment or for a short period of time. Are we prepared for this? How can we accomplish it?
- Just because the brand has never done it before doesn't mean it won't work out. What's exciting about this? What concerns you?
- What has worked well in the past may not work well in the future. Why do you think this might be true? What should we do about it?
- How often are we willing and able to test new content? How quickly are we able to adapt to successful ideas?
- Are we ready to measure the results? How will we do that? What do we consider a successful test?



# PYBOP GUIDANCE

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## 1 LIST YOUR GOALS FOR CONTENT STRATEGY OUTCOMES

I find it helpful to first ask different people involved in the business to list these goals on their own, without discussion. Include designers, writers, editors, project managers, customer service representatives as well as your executive team. Then, invite them all to a Goal-Setting Workshop.

Include an outside content strategist or visual communicator to facilitate the ideas. This will help shy, knowledgeable people speak up as well as help legacy employees open up to fresh perspectives.

Within the workshop, ask everyone to participate by writing their business goals on one side of a whiteboard and their audience goals on the other. As a group, see how many goals overlap. Then draw a line from the business goals to the specific audience goals that they support.

What's left over is room for a Gap Analysis discussion!

## 2 OUTLINE YOUR LIMITATIONS (AND OPPORTUNITIES!)

When first striking out on a content strategy initiative, I often recommend forgetting about your limitations. Getting stuck in the “But how will we achieve xyz” is the perfect way to stifle great problem-solving and business-building ideas. Go for the ideal, then narrow it down to what you can do afterward.

But if you're running the show, you need to know your limits ahead of time. If your deadline to launch is in three months, you need to fast-track your strategy and execution. You can't take three months to plan. And if you don't have the people resources to pull off much at all, one of your first tasks will be to go out and find the right people to jump in and be part of the team from the beginning.

Limitations also can be a great momentum builder. When the team knows exactly what they are working with, they can leverage these assets and schedules to make the best thing possible within those limitations. When you're working with “sky's the limit” ideology, often things just don't get done.



# PYBOP GUIDANCE (CONTINUED)

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## 3. DESCRIBE YOUR AUDIENCE

Your audience is the reason you exist. So it's a good thing if everyone knows who you're talking to and what they want from you.

A big mistake many companies make is to stick to anonymous demographics. If you listed: gender, age, time of life (getting married, searching for a school, preparing for surgery) as the only description, you have some work to do.

A couple ways to get your team thinking outside of traditional demographics is to host an Get to Know Our Audience Workshop.

Ask different people from your company -- from executives to executive assistants to sales people -- to describe a client or customer they've talked to recently.

Or ask your team to describe the audience as a character in their favorite movie or play. If you're working with writers, I'd suggest going as far as asking them to write dialogue between your brand-as-persona and the audience persona.

## 4. ASK FOR A FRESH PERSPECTIVE

We often know our brand and content so well, it's tough to see where it could improve or grow.

Call customers. Host a happy hour. Hire an outside content strategist for a Content Analysis.

Small efforts to gain new perspectives on a regular basis could provide that next incremental or monumental million-dollar idea.

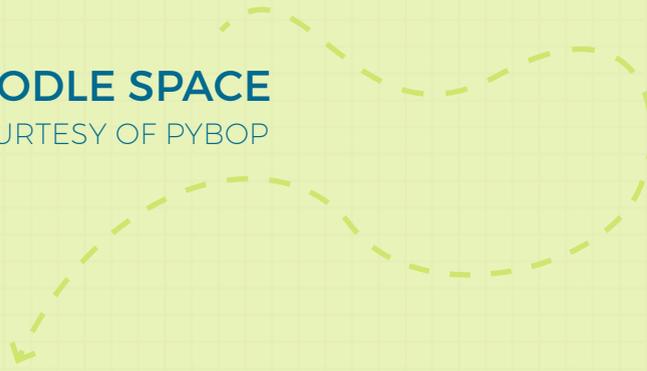
## 5. PREPARE THE TEAM TO TAKE RISKS, TEST, AND ADAPT

Your people are what's going to make this thing happen successfully. Get people together in small groups or one-on-one for coffee or lunch. Tell them what's up and how they will be involved.

Once they get excited -- and not fearful of or even insulted by -- the upcoming changes, that's when the real magic happens.

## ADDITIONAL DOODLE SPACE

COURTESY OF PYBOP



## HOW CAN WE HELP?

Founded by Shelly Bowen in 2008, Pybop is a boutique content strategy consultancy focused on helping exceptional companies share their brand stories most effectively. Shelly has been producing and directing digital content for more than 15 years. We'd be happy to help you at any stage of the content strategy process.

Contact [SBowen@Pybop.com](mailto:SBowen@Pybop.com).

