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Virtual workshop
Plain Language Summit 2020
October 28, 2020
Topics for this session

- Differentiating strategy and tactics
- Defining content strategy
- Considering scope and topics for a content strategy
- Creating your content strategy: Discover, Plan, Align, Use, Govern
- Using the strategy – tips on tactics
- Time for your questions and comments
People tend to talk about the tactics

Inventory the content

Audit the content

Hire and train writers, editors

Set and follow an editorial calendar

Write, edit, design, publish

But tactics are different from strategy.
Strategy drives the tactics

Before you use the tactics, you must know what you are trying to achieve. The strategy is the **blueprint** for using the tactics.

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Defining content strategy – 1

Content strategy guides your plans for the creation, delivery, and governance of content.

Kristina Halvorson and Melissa Rach
*Content Strategy for the Web*
2nd edition, New Riders, 2012, p. 28
Content strategy is about managing and optimizing content to meet business goals by being findable, usable, and actionable.

Margaret (Pegi) Black
How is Content Strategic? and How is Content Strategic?
Content Strategy DC, 3/28/19
Defining content strategy – 3

Content strategy

Thinking strategically about your content
Aligning content with the organization's goals while meeting users' needs

Ginny Redish
In many workshops through the last decade

Also see Ahava Leibtag
*The Digital Crown*
What content should a content strategy cover?

Any collection of content –
  broad or narrow
digital, print, (preferably both)
An example of scope: Minnesota Revenue

**Problem:** Too many phone calls about letters to taxpayers

**Scope:** Letters to taxpayers (later expanded to web, customer service, etc.)

**Discovery:** Letters to taxpayers were not in plain language

**Success:** Fewer phone calls

ClearMark award (finalist, 2016)
Governor Dayton issued an Executive Order for all agencies to use plain language


Terri Steenblock, then at MN DOR
Melissa Donndelinger, then at MN DOR
Ginny Redish
Subject: Notice of intent to offset

Our records show that you owe a state debt to the Minnesota Department of Revenue. If this is a joint debt each debtor may receive a separate notice.

Debtor name: ADAM LAST  
Debt type: 2009 Individual Income Tax - Audit  
Amount due: $1,541.63

We intend to file a claim with the U.S. Treasury Offset Program for this amount. This federal program allows the Department of Revenue to claim your federal tax refunds and federal non-tax payments and apply them to your debt. Some non-tax payments, such as social security are ineligible for offset. The U.S. Treasury will only send us your payments that are eligible for offset by federal law. In addition, they will deduct a fee for each transaction before they send the payment to us. The U.S. Treasury sets the amount of this fee and may change it annually. We may have already filed a claim with this program for other state debts you owe.

Having an active payment agreement will not prevent us from filing a claim. If your federal tax refund and/or federal non-tax payment applies to your debt, your payment agreement may end earlier than scheduled. Your payment agreement will automatically end when either you no longer have a balance due with the Department of Revenue or all scheduled payments have been requested. If you currently have a payment agreement in place with the Department of Revenue, continue to follow the terms of the agreement.

To avoid this claim from being filed, you must pay the amount due in full immediately.

Options for making payment:

- Electronically debit your bank account - pay online at www.revenue.state.mn.us or call 1-800-570-3329. There is no charge to you for using this service.
- Major credit card - log into the Value Payment Systems website at
The Minnesota Department of Revenue may take your federal payments

Debtor: TEST TEST  
Debt Type: METRO STATE U General Accounts Receivable  
Amount Due: $801.42

Why can you take my federal payments?  
When you owe a state debt, the law allows us to take certain federal payments to pay your debt.

Note: Each person responsible for paying this debt may receive a copy of this letter.

Will you still take my federal payments if I already have a payment agreement?  
Yes. The terms of your payment agreement include collecting federal payments and refunds to pay your state debt. Your payment agreement will continue as scheduled.

What federal payments can you take?  
We can only take payments allowed under federal law. Some examples are below.

<table>
<thead>
<tr>
<th>We can take</th>
<th>We cannot take</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Vendor or contractor payments</td>
<td>• Federal tax refunds</td>
</tr>
<tr>
<td>• Expense reimbursements</td>
<td>• Social Security income</td>
</tr>
<tr>
<td>• Travel advances</td>
<td>• Veterans benefits</td>
</tr>
<tr>
<td>• Certain types of grants</td>
<td>• Railroad retirement benefits</td>
</tr>
</tbody>
</table>

What happens next?  
If you still owe this state debt in 60 days, we will notify the federal government. They will send us your federal payments until this debt is paid in full.

Note: If you have evidence this debt is not past due or not legally collectible, you may request a

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What topics should a content strategy cover?

From Kristina Halvorson's company, https://www.braintraffic.com
How do we get to a content strategy?

Discover

Plan

Align

Use

Govern
Discover the situation before you plan

Discover

Before you have a strategy, you must know what you are trying to achieve.

Plan

Aligning content with the organization's goals while meeting users' needs

Align

What's the purpose of your organization? (vision, mission, goals)

Use

Whom are you trying to reach with your content? (personas)

Govern

What problem are you trying to solve?
Organization's goals + users' needs

Our Mission
Working together to fund Minnesota's future.

Our Vision
Everyone reports, pays, and receives the right amount: no more, no less.

Organization's mission and goals
↓
Strategy
↓
Tactics

You succeed only when the people who need your content succeed.

Find → Understand → Use

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Another example: www.ready.gov

<table>
<thead>
<tr>
<th>Mission and goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready is a National public service campaign designed to educate and empower the American people to prepare for, respond to and mitigate emergencies, including natural and man-made disasters.</td>
</tr>
</tbody>
</table>

The goal of the campaign is to promote preparedness through public involvement.
https://www.ready.gov

Cybersecurity
Learn how to prevent, detect and respond to cyber incidents.
Get Cybersecurity Tips

Pandemic
Know the facts about a pandemic. Public Health is everyone's responsibility.
Learn How to Stay Safe

Hurricanes
Prepare for hurricanes now. Know where to go if asked to evacuate quickly and how you and your family will get there.
Get More Hurricane Tips

Prepare for Earthquakes
The Great Shakeout is at 10:15 a.m. on Thursday, October 15. Learn what you can do to get prepared for earthquakes ahead of the drill.
Get Earthquake Tips

Wildfires
If there is a wildfire in the area, be ready to evacuate on short notice.
Get Wildfire Tips

Flooding
If you approach a flooded road or walkway, follow this rule: turn around, don’t drown!
Prepare for Flooding Now
How do we connect the organization and users?

The content of ____________________
[our website, letters, whatever we are developing a strategy for]
will be successful if
[these people] ________________________________________
[do this] ___________________________________________.

Be as specific as you can when naming "these people."
. . . taxpayers, people who concerned about an emergency situation, cancer patients and their families, agency staff, . . .
How do we keep our users in our minds?

Personas!

Free "persona" pictures: [https://thispersondoesnotexist.com](https://thispersondoesnotexist.com)
Save the faces that work for your personas.
Plan for all the elements of a content strategy

Discover
Plan
Align
Use
Govern

Processes

• How will you solve the problem you discovered?
• How will you get content efficiently and effectively through its life cycle?
• Who will review? When? How?

People

• Writers: Who? How many? Training needs? etc.
• Editors: Who? How many? Training needs? etc.
• Designers? Producers? Others?

Policies

• Content types and messages
• Style guide – emphasizing plain language guidelines
• Voice and tone guide – may vary by audience and medium

Pay – Budget!

Priorities – What to tackle first
Collaborate to get to your content strategy

- Form a cross-functional team (related to the problem and the scope)

- Together, go through Discovery, Planning, Aligning (The team may need facilitation and training to do this.)

- Convince people the problem is real
  - Get relevant data:
    - web analytics, error rates on forms, phone calls, . . .
  - Do a usability test of the current content: website, letters, forms, fact sheets
Training helped WA DSHS remove silos – 1
Washington State Department of Social and Health Services

Before content strategy

News
Different offices' websites
Training helped WA DSHS remove silos – 2

After training with reps from every division

Bill Cogswell of WA DSHS
with Suzanne Boyd & Emma Rose from Anthro-Tech, and Ginny Redish

© 2020, Janice (Ginny) Redish  Content Strategy  Slide 23
Training helped WA DSHS remove silos – 3

Today

Vision

- People are healthy,
- People are safe,
- People are supported,

Mission

As a Department we are tied together by a single mission: to transform lives.
Align your strategy with others

Discover
Plan
Align
Use
Govern

Make sure your plan fits with
- what you learned in Discovery
- other strategies in the organization
Coordinate strategies to serve your users

Make sure you
- share the same vision and mission
- have compatible goals
- understand the same personas – their goals, needs, journeys, scenarios

Work with other strategists to
- help people know about the content
- get people to the content
- find out how usable the current content is
- plan to find out how usable new content is
Use your strategy to improve your content

- Inventory the content
- Audit the content
- Hire and train writers, editors
- Set and follow an editorial calendar
- Write, edit, design, publish
Govern the content moving forward

Discover
Plan
Align
Use
Govern

Who is in charge?

Who decides when issues arise?

How will you keep the content current?

- Every topic or page or document must have an owner and a schedule for when it is looked at again

How will you keep the strategy current?

See also:


Managing Chaos
Welchman, 2015
An example of strategy driving tactics: gov.UK

Problems: Too many websites with too many pages. People need several sites to complete one task.

Scope: All UK government websites

Discovery: Websites with content not relevant to government

Strategy decision: "Government should only do what only government can do." We publish content only if users need it.
(email from Sarah Richards to Ginny Redish, 11/4/19)

Success: 116,000 pages deleted

https://www.slideshare.net/SarahRichards2/confab-us (Slide 27)
Using the strategy – tips on tactics

- Inventory the content
- Audit the content
- Hire and train writers, editors
- Set and follow an editorial calendar
- Write, edit, design, publish
1. Inventory the current content
You have to know what's there to know what to do with it.
One useful way to keep track of and show the inventory is a spreadsheet with columns like these:

**Columns to use for inventory**
- URL
- page title
- short description
- URLs that link to this page
- URLs of links from this page
- date created (if known)
- date last updated (if known)
- current owner (person or part of the organization)

or similar columns for letters, notices, or whatever you are inventorying
Audit the content

Columns to use for auditing

- fate (delete, move, combine, separate, edit)
- importance (high, middle, low – to set priorities for dealing with its fate)
- comments related to fate and importance
- person responsible for making changes
- (possibly more columns related to "who" for owner, writer, editor)
- due date for changes
- status (not started, in process, in review, published – or whatever stages you have set for the writing / editing / reviewing / publishing process)
Tip 1 for auditing – usability testing

Include usability testing in your content strategy.

If you did not do usability testing of the current content in the Discovery phase, do it when you audit the content.

Caroline Jarrett and Ginny Redish,
How to test the usability of documents (3 techniques)
UXmatters, May 4, 2020
Tip 2 for auditing – purpose, persona, conversation

Use this 4-step process:

1. **Answer:** What's the purpose of this content?

2. **Answer:** Who is the persona for this content?

3. Walk the persona through the conversation that the persona wants to have on the topic of this content

4. Use the purpose, persona, and conversation to analyze the content and decide what to do with it
Step 1: What's the purpose?

What do you want people to do after reading or using this content?

My communication will be successful if

[these people] ______________________________

[do this] ________________________________.

Only keep content that serves important purposes for the organization and the user.
Step 2: Who is the content for?

Have a relevant persona?
Great. Take that one to the next step.

Don't have a relevant persona?
Create an "assumptive" one with the format on the next slide.
Creating an assumptive persona

[Name] ____________________________
Job or position, representing what group
________________________________________________
[Name] is coming to this content now because [persona's purpose, problem, or questions] ________________________________________________
_______________________________

When [Name] comes to this content, they are [adjectives or phrases, such as busy, frustrated, tired, . . .] ________________________________________________

In relation to this topic, [Name] knows [how much about the topic, specific words] and doesn't know [specific words] __________________

We must also remember that [Name] is [anything else that is relevant like using a mobile, reading in a second language, . . .] __________________

_________________________________________________________________
Step 3: Walk your persona through the conversation

Be the persona.
Talk through your experience and reactions – as the persona.
- What is your day like today?
- How did you get (or get to) this content?
- Do you read it right away? (If not, what do you do with it?)
- Do you read all of it?
- What part of it do you go to first?
- How do you react to it?
- Does it answer your questions?
- Are any sentences or words unclear to you?
- What are you going to do now?
Step 4. Use the purpose, persona, and conversation to analyze the content

- How well does the current version meet the organization's goals and the user's needs? (How well does it serve your content strategy?)

- Should you keep it, remove it, change it?

- How should you change it? What would make it better?
  - Different content?
  - Better title?
  - Different organization?
  - More headings? Different headings?
  - Better writing? Shorter pieces? Less jargon?
  - Different layout?
Thank you

Your turn:

Question?

Comment?

Favorite example – good or poor?

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