CONTENT STRATEGY ROADMAP FOR CLIENT Z

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INTRODUCTION

Client Z is an Information System (IS) with a centralized, cloud-based platform that is highly configurable and scalable for its users. It offers an organized and searchable Help Center to aid its users in using and navigating the software platform. In addition to the Help Center, Release Notes are issued every two weeks and every quarter to inform users of new features and functionality that have been created by developers within the software. It is essential that the technical writing team update the Help Center with this latest content promptly and that the information within the Help Center is accessible to Client Z IS users.

My team conducted an inventory audit and assessment to find if the Help Center contained information from pages 55-93 of the January 2024 Release Notes (Everitt, Palmiere and Fisher). The client intends to use this information to make necessary updates to the content of the Help Center. Based on client interviews and the Style Guide and Information Design documents provided, we defined the criteria to apply in our audit of the Help Center: Help Center Content, Information Design, and Adherence to Style Guide. We prepared a spreadsheet with our data to help the technical writing team quickly find content missing from the Help Center, we proposed placement for missing content, and we found Help Center pages that need an update for Style Guide adherence.

This report contains a Content Strategy Roadmap created based on information gathered in the content inventory and assessment. First, it includes a Strengths, Weaknesses, Opportunities, and Threats Analysis (SWOT Analysis) to consider internal and external factors that inform content management. Then, it assesses the maturity level of the Client Z Help Center and proposes Strategies and Tactical Implementation to raise that maturity level. This Content Strategy Roadmap will guide Client Z to achieve its content management goals for the Help Center now and in the future.

SWOT ANALYSIS

The content in the Help Center is abundant and helpful, resulting in high user satisfaction. To effectively manage this content and continue to strengthen the brand of Client Z now and in the future, it is helpful to look at both internal (**Strengths and Weaknesses**) and external factors (**Opportunities and Threats**) and take both into consideration. Attention to these factors will help to differentiate Client Z from its competitors and provide complete awareness to make business decisions.

Strengths

There is a vast quantity of information in the Help Center that is designed for users to help themselves while using the software. Because the software is entirely **cloud-based**, content is easily **searchable**, and it is easy for users to find and access the information they need when they need it. Overall, users report that the Help Center is **easy to navigate**, and Client Z is one of the most successful IS platforms as measured by **client satisfaction** (Top Work Places).

Weaknesses

According to user surveys cited in the Client Z Information Design document, the Help Center content needs to be more detailed to improve **usability**. During audit and assessment, my team determined that **findability** within the Help Center content needs improvement to maintain user satisfaction. There were seven Release Notes topics that did not have a logical location for placement within the Help Center, indicating that **content structure and organization** should be revisited. Users also prefer to have better introduction content about the product and its features to reference after implementation. Reviews have shown that users also want more firsthand **training content** in the form of guides and videos (Client Z Platform Reviews).

Opportunities

In this time of **streamlining** business operations to save on costs, Client Z should find ways to create and manage content more efficiently. Within the Help Center there is substantial useful content, however users report that it can be difficult to find, which results in increased support center calls even though the information is available. Being prompt in including the latest content from Release Notes and in removing outdated content will result in better findability for users and cost savings from fewer support center calls.

Another opportunity for streamlining content management is to explore the use of the **emerging technology** of artificial intelligence (AI) chatbots for the Help Center. According to David A. Teich, AI chatbots have become a "'must have' for ecommerce sites" (Teich). He cites two important ways that chatbots contribute to the content of a help center: providing round-the-clock availability of help content and providing more information to the organization about their users and products. These are both opportunities for Client Z to decrease costs and to collect even more analytics to inform content management decisions.

One more important opportunity in the content management strategy for Client Z is to stay ahead of **trends in information management** to easily incorporate new related content and features into the Help Center. For example, George Lawton cites trends such as extreme weather risks that are growing in importance, and

therefore it would be advantageous for Client Z technical writing team to plan to accommodate new Help Center content relating to this emerging trend (Lawton). Along the same lines, preparing for **globalization** of the company is a sound content management strategy to use. The company has 233 current users, and 30 of these are outside the United States (Client Z) Creating a strategy for managing new content that will include new languages, new laws, new regulations, etc. within the Help Center would also be an advantage for the company in the future as its client base grows internationally.

Threats

External factors that threaten proper management of content for Client Z must be accounted for to maintain a sound content management strategy. **Emerging trends** in enterprise risk management will keep Client Z from remaining competitive if they are not considered by strategists in the operation of the Help Center. Lawton names twelve top trends from this year that are influencing business decisions in information management and should therefore be considered by Client Z in its content strategy (Lawton). Along the same lines, **changing regulations** in information management should also be predicted to easily incorporate the associated content into the Help Center to eliminate the threat of disruption to the IS.

New technologies offer opportunities when adopted early, but they can become liabilities if they are adopted late or poorly integrated. For example, AI chatbots change the game with their cost savings, ease of use, and availability, but if they are not trained with correct information, they will not help the user. Erroneous or incomplete Help Center information will negatively affect user satisfaction and result in decreased revenue.

Lastly, it is always prudent for an organization to avail itself of knowledge of **competitor strategies**. The Client Z 2023 IS Report by O'Neill and Tweedy contains vast information and analysis of Client Z competitors and their strategies (O'Neill and Tweedy). Competitor X is identified as the IS with the largest market share and the most comprehensive platform. Competitor Y is a new company of interest to be included in the 2023 IS Report. Highlights of user support offered by these two competitors follow (O'Neill and Tweedy):

Client Z	Competitor X	Competitor Y
• Purpose-built IS platform • Introduced over 225 enhancements since 2022 • Email • Helpdesk • Knowledge base • Online help • Screen "tips" • User manuals • Video tutorials • Bi-annual user conference	• Largest IS provider • Integrated platform • In 2022 included 314 net new features added consisting of over 1,000 individual workflow enhancements • Dedicated account representative • Helpdesk • Online help • Video tutorials • Annual user conference	• Based on customer feedback in 2023, building more self-service into system • Named, dedicated customer success manager (CSM) • Helpdesk • Knowledge base • Live chat • Online help • Screen "tips" • User manuals • Video tutorials • Annual user conference

Two areas where a gap exists between Client Z and the highlighted competitors are having a dedicated client representative and having a live chat feature.

STRATEGIC DIRECTIONS AND TACTICAL IMPLEMENTATION

IPMM (Information Process Maturity Model)

Part of a content strategy roadmap includes defining the maturity level of the organization or business unit to assess the current state of content strategy and plan to advance that maturity level. For the purposes of this report, I focus on the Client Z Help Center as the unit of interest. Following the guidelines of the Information Process Maturity Model (IPMM) established by JoAnn Hackos, I determined that the Help Center is **Level 3** (**Organized and Repeatable)** based on the descriptions in her paper (Hackos).

Characteristics of a Level 3 organization described by Hackos include "committed to following uniform processes, templates, tools, and standards," as well as "supported by a strong leader who has a vision for the organization and is helping staff realize that vision." Level 3 organizations are also described by the IPMM as having "staff find opportunities for improvement." All these traits are associated with the Help Center and its content management.

Client Z can elevate the maturity level of the Help Center to Level 4 (Managed and Sustainable) by focusing on the strategic directions of:
- **Planning, Estimating, and Scheduling**
- **Collaboration**

In the following sections, I discuss those strategic directions and tactical implementation to achieve this goal to elevate maturity.

Strategic Directions

Presently, the Client Z technical writing team consists of three technical writers including our client contact, the Manager, with plans to hire five more technical writers. This team of internal writers produces the Release Notes that document new features and functionality every 2 weeks and every quarter, to provide the most updated information to their users as quickly as possible. However, according to client interviews, the Release Notes are created by the internal writers without updating the Help Center at the time of their release. An external team of writers is contracted to manage the content within and updates to the Help Center. Following a strategy to raise the IPMM level of the Help Center management by strategies to connect these two separate teams is a commitment that will elevate the standards of the unit by creating a more rigid framework for the teams involved in its management.

In our audit and assessment of the current state of the Help Center, my team did not find any of our 29 Release Notes topics within the existing Help Center. We determined that 22 of 29 Release Notes sections could be incorporated into existing Help Center topics, and there were 7 Release Notes sections that did not have a logical placement within the Help Center (Everitt, Palmiere and Fisher). These gaps in content between the two user resources are problematic and affect user satisfaction.

To address this issue, there are two strategic directions to follow.

Planning, Estimating, and Scheduling
According to Hackos, Planning ensures "that information meets customer needs, is delivered on schedule, and is developed at a cost commensurate with its value to the customer" (Hackos). While the Release Notes are produced internally on a schedule, Help Center updates are not done by the external team on a complementary schedule. Establishing a planning process that is followed by both the internal and external teams that oversee these two content resources is vital to maintain user satisfaction, provide updated information across user resources, and keep extra expenses down.

Estimating and Scheduling are also part of this strategic direction to advance maturity of the Help Center. It is important for Client Z to accurately estimate time and labor needed for content management tasks and to maintain the quality of the Help Center content. "During a project, data is tracked to ensure that the project remains on schedule and that the designed scope can be accomplished," writes Hackos (Hackos). Creating a schedule for both the internal and external teams to follow will also help unify the documentation and maintain user satisfaction.

Collaboration
Another strategic direction to elevate maturity level is Collaboration. Hackos states "Collaboration is necessary to develop content that is shared among multiple deliverables and customized for user needs" (Hackos). Once the internal team expands, Collaboration will not only be important for this larger internal team, but it will also be helpful between the internal team and the external team to help create more uniform documentation for the users.

Both the internal and external writing teams need to collaborate to plan, estimate, and schedule the creation of the content of Release Notes and the Help Center. As Halvorson and Rach state in their book Content Strategy for the Web, "Content is a team sport" (Halvorson and Rach). In this case, the two teams need to play together, not separately.

Tactical Implementation

Content Planning Calendar
The tactical implementation of the strategies described above is the use of a Content Planning Calendar. The purposes for implementation of this calendar to manage the Help Center content are adapted from Content Strategy for the Web and are as follows (Halvorson and Rach):

- Integrate content across different user resources (Release Notes and Help Center).
- Meet user needs for updated, complete information.
- Align content of Help Center with business goals.
- Make updates to Help Center on schedule.
- Provide resources to maintain schedules, if needed.

Implementation of a Content Planning Calendar will set up a framework for not only timely updates to the Help Center, but also for scheduling reviews for culling outdated information, checking for gaps in content, quickly finding and addressing gaps between sources, and keeping all team members on the same level of productivity. Tracking this information will also provide analytics data for the teams to use to improve content and its management.

This practice will also introduce an opportunity for collaboration between the external and internal teams responsible for producing the Release Notes content and the Help Center content. Adhering to the same Content Planning Calendar will ensure that the separate teams will produce uniform content for the user. This will result in easier integration of the Release Notes content into the Help Center, and this improved resource for users will increase user satisfaction.

CONCLUSIONS

The Help Center provided for Client Z IS users is an excellent resource for its users that is easy to use and navigate. Its maturity is Level 3 (Organized and Repeatable), according to IPMM standards. This level shows that best-practice standards are well-established and well-maintained. There is an opportunity for Client Z to elevate the maturity level of this resource by taking two strategic directions that can be easily implemented by strategists at little cost:

- **Planning, Estimating, and Scheduling**
- **Collaboration**

Both are vital to produce uniform documentation to help users to help themselves while using the product.

Implementation of **a Content Planning Calendar** is a simple, low-cost measure that will produce positive results quickly. The technical writing team should collaborate to create the calendar, define its purpose, decide upon maintenance and updates, and choose any metrics to collect about the functionality of the calendar process. It will take an initial investment of time and effort to set up the Content Planning Calendar, but once the technical writing team implements it, it will be an important support framework that requires little maintenance to continue to work.

A further recommendation is to involve the external writing team in the calendar creation to make sure they are fully on board to implement this tactic. Their input will invest them in the process and further integrate the quality of their documentation (Help Center) with the quality of documentation of the internal team (Release Notes). Uniform and consistent content makes happy users.

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