

Content strategy: Audit analysis

Finalsite Support and Client Education
Content Strategy





Project overview



Project overview

As a reminder, our approach to content strategy consists of a core strategy with four key components: Editorial, Experience, Structure, and Process.



This presentation sets the stage for effective content strategy and helps ensure that our content is useful, usable, purposeful, and profitable. Its purpose is to align all stakeholders on:

- Business goals and content objectives
- Challenges and opportunities that our content strategy must address



Progress

The information and insights in this document were derived from the discovery (audit) phase. To arrive at our findings, we compiled a full quantitative inventory of content across the Knowledge Base, Finalsite Training LMS, and Support blog. We also completed a qualitative assessment of each article in the Knowledge Base.

Our discovery goal was to conduct a holistic audit of all content provided to clients by the Support and Client Education departments in order to assess its accuracy and efficacy, identify gaps and overlaps, and begin to develop strategies and workflows for improvement and sustainability.

Inventory data is preserved [here](#).

Goals, objectives, and audiences





Business goals and content objectives

Increase retention by providing best practices and instructions on how to use the software after purchase and throughout the user journey.

1. Empower self service for all types of users, taking into account their organization, site type, knowledge level, learning preferences, abilities, and more.
2. Add best practices, thought leadership, and other higher-level content to our offerings.



Business goals and content objectives

Increase availability of self-service resources to reduce training requests and Support tickets.

3. Improve search capability and labeling to make our content more accessible to the users who need to find it quickly.
4. Create a structure that is easy to browse and discover for users who are just starting out or don't know exactly what they're looking for.



Business goals and content objectives

Improve employee efficiency and performance measurement with sustainable workflows and established procedures.

5. Develop a structured maintenance workflow to keep content up to date as the software changes.
6. Establish metrics to gauge the effectiveness of our tactics and determine where more effort is needed.



Audience Definition

Based on our discovery activities, we've prioritized the primary audiences for our teams as follows.

Admin

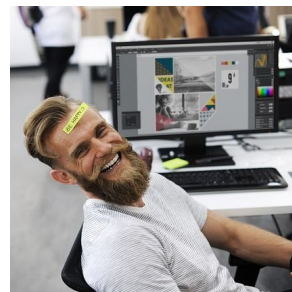
Someone who customizes settings for content display and site management on an ongoing basis. They will create Composer pages and configure element settings, build Messages templates, update admin permissions, moderate posts in Feeds, and submit Support tickets.



The New Admin



The Inheritor



The HTML
“Expert”

Audience Definition

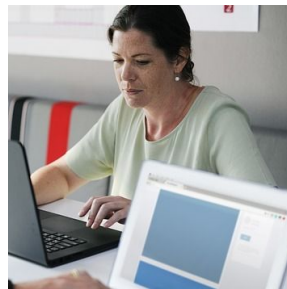
Based on our discovery activities, we've prioritized the primary audiences for our teams as follows.

Superadmin

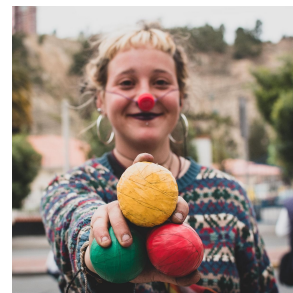
Someone who is involved in the deployment process and initial launch of a Composer site. They may be involved in design decisions, “set it and forget it” configurations, managing and training other admins, and more tasks outside the scope of a general admin.



The Adminzilla



The IT Director



The District Admin



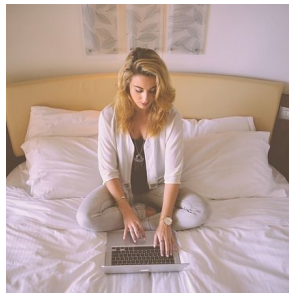
Audience Definition

Based on our discovery activities, we've prioritized the primary audiences for our teams as follows.

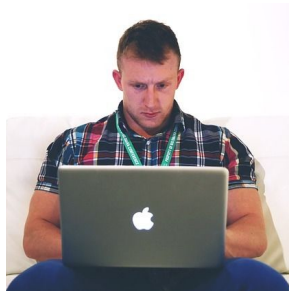
User

Someone who creates content within the Composer environment, whether as an admin user or a portal user.

Common tasks include composing a message, publishing a post, editing a Content element, and updating a calendar or athletics event.



The Parent



The Coach



"Just" the Secretary



Current trends



Current and outdated content

Outdated: 156

Unnecessary: 382

Current: 278

Have to rewrite: 89

Accurate: 410

Inaccurate: 113

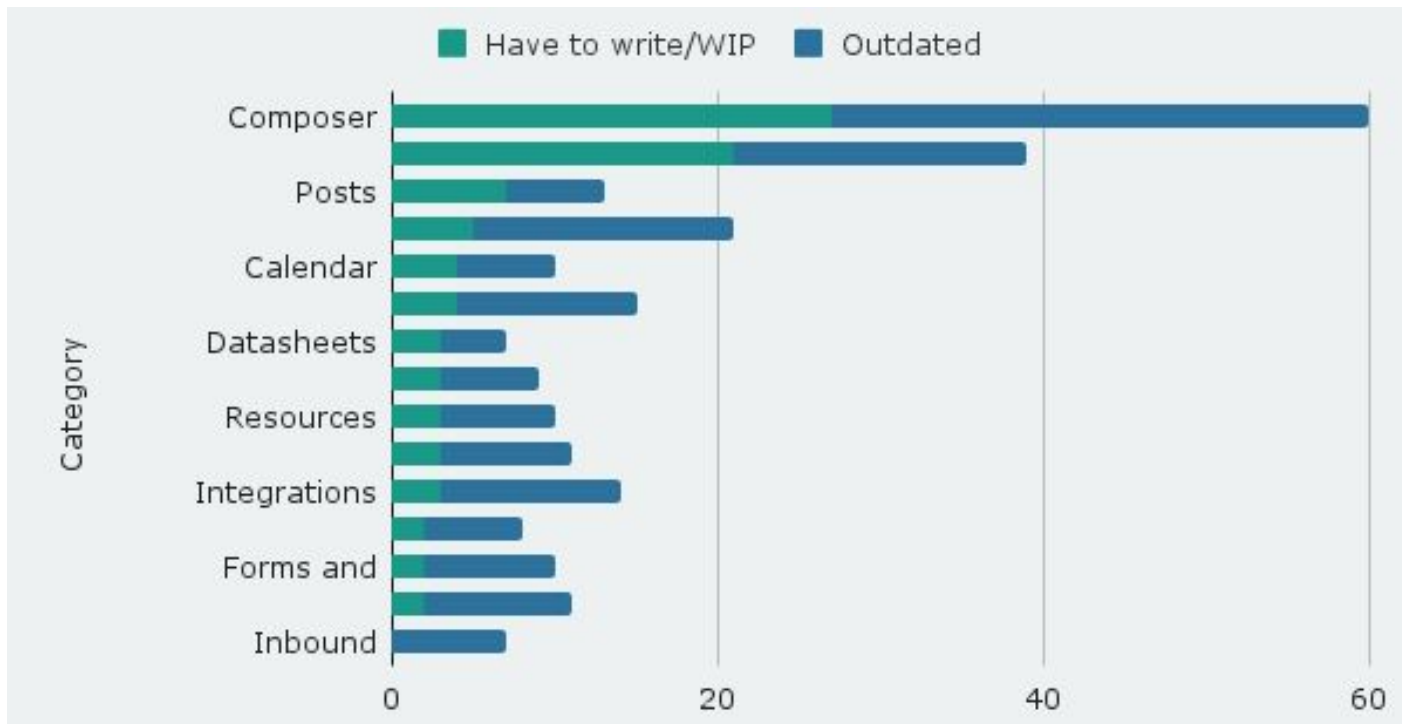
Note: Articles deemed unnecessary were not audited and are therefore excluded from subsequent analysis.

***Takeaways:** We have a large amount of content that needs to be updated, needs to be completely reconceived, or is no longer relevant to the vast majority of our users.*

Relatively few of these articles are strictly inaccurate; however, we should prioritize the articles with inaccuracies.

More than 46% of our articles are no longer necessary for the majority of our users and can be archived, combined, moved to Guru or Zendesk macros, etc.

How many articles in each category do we need to rewrite or update?





Audience focus

Admin: 250

Superadmin: 127

User: 133

Admin, Superadmin: 2

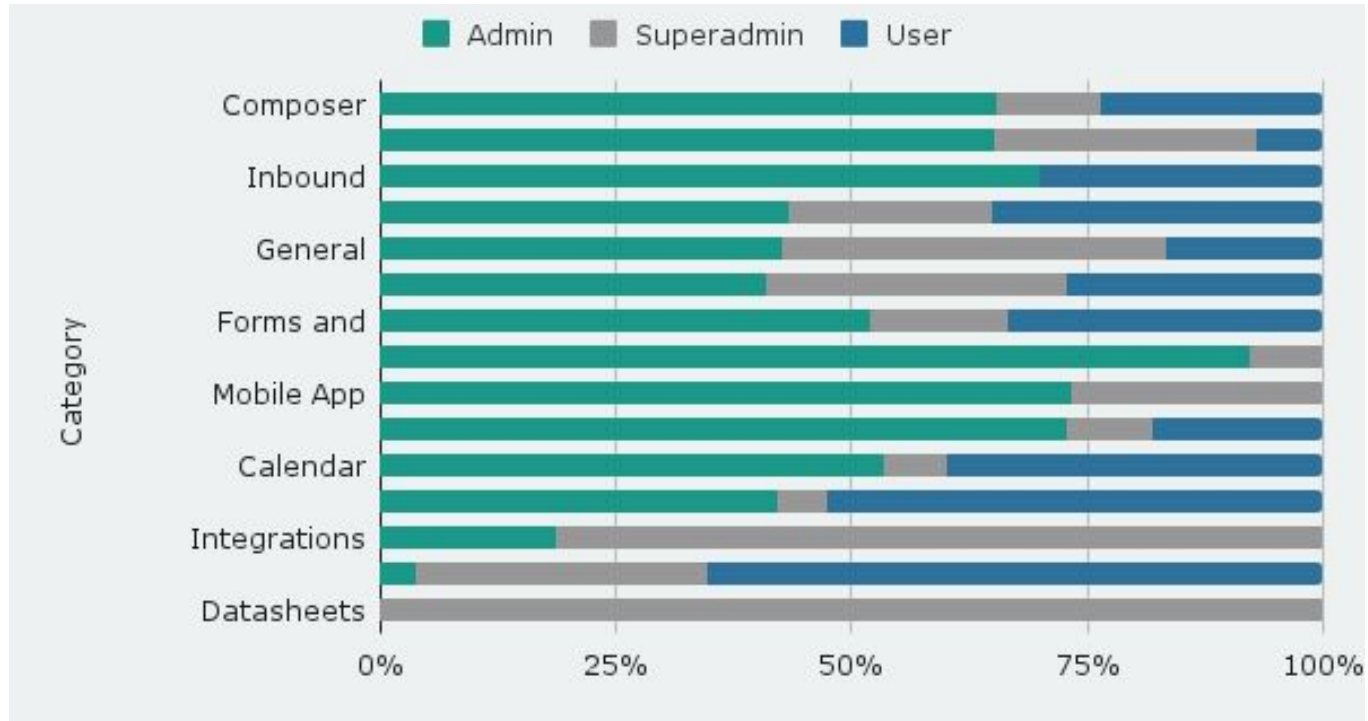
Admin, User: 10

User, Admin, Superadmin: 1

Takeaways: Most of our content is directed at the admin user who has permissions to configure settings but isn't currently involved in deploying the site. Fewer articles are available for users or superadmins.

A handful of articles are written for more than one audience. These can be improved by separating content for each audience.

How many articles in each category are aimed at each audience?





Article content types

Instructions: 255

Overview: 115

Settings: 76

Best practice: 47

Informational: 42

Troubleshooting: 14

Download: 7

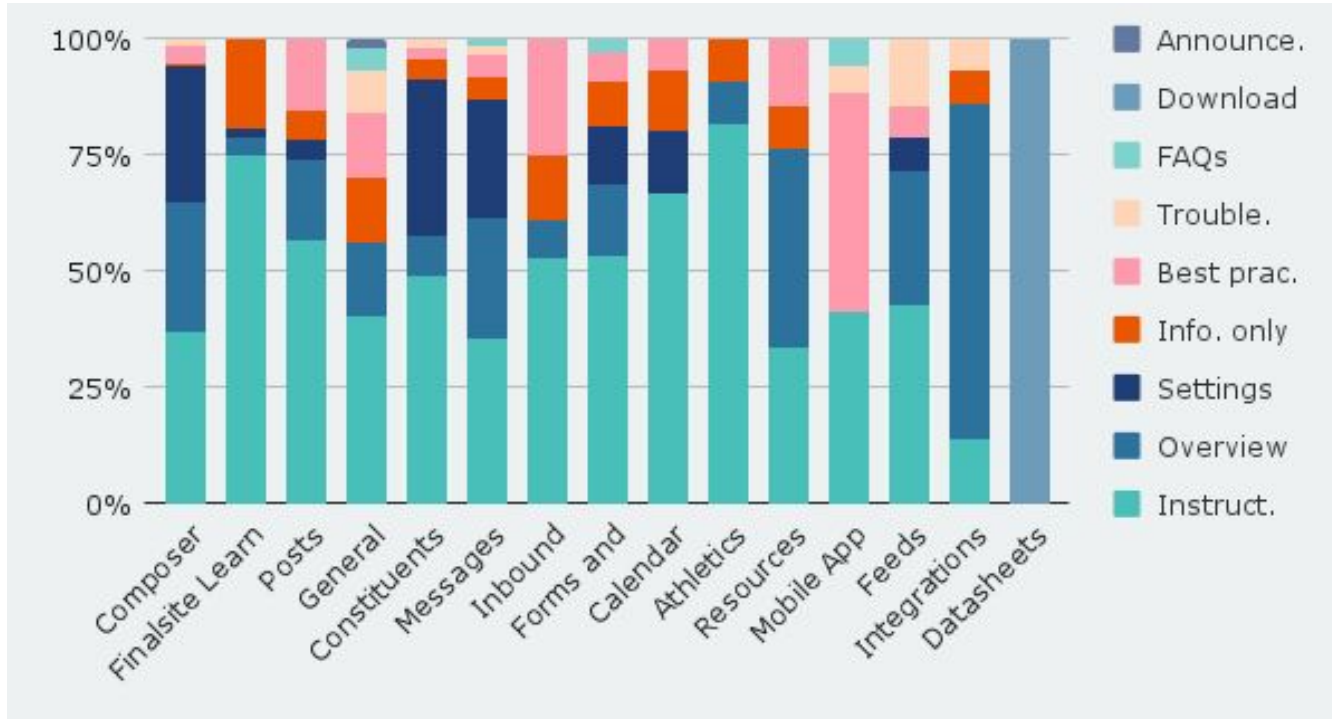
FAQs: 6

***Takeaways:** Our existing content is focused primarily on instructions, which is desirable.*

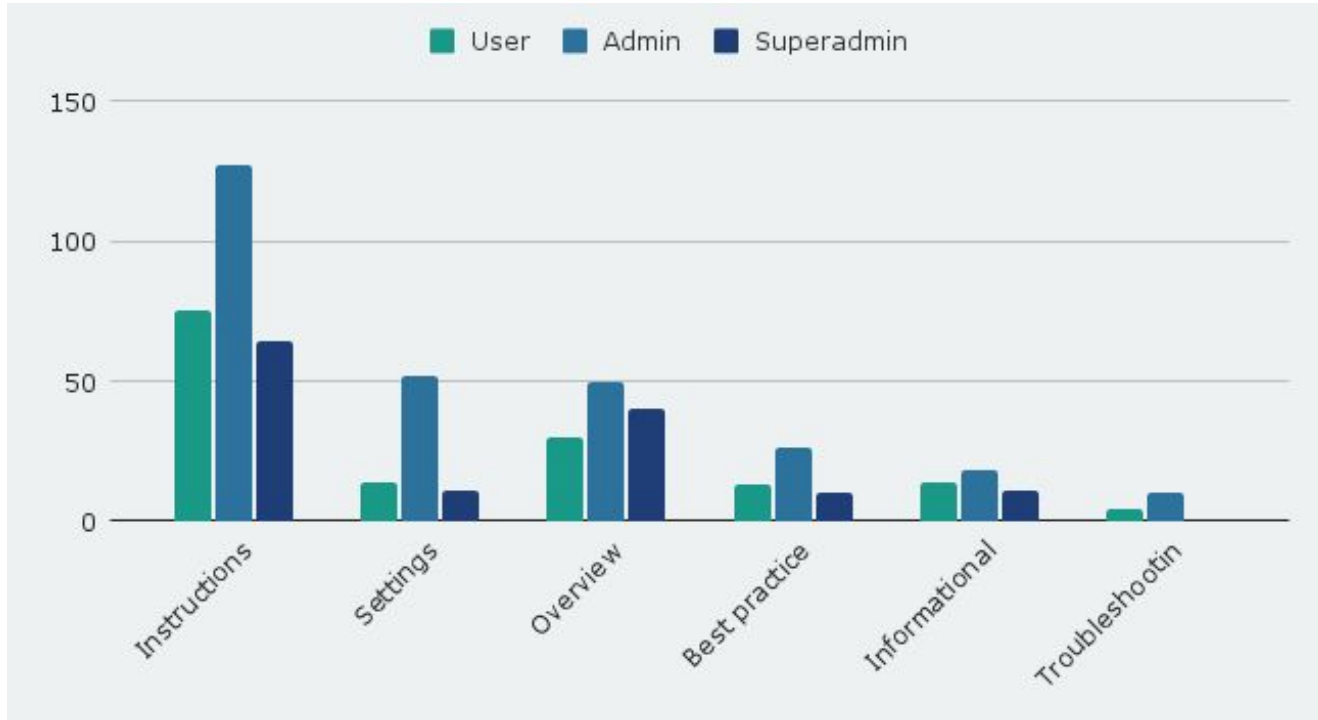
Articles that are informational only, not actionable, should be minimized and presented in a consistent format and/or location to help users distinguish them.

Articles that encompass more than one content type may be improved by separating and focusing content.

How many articles of each type are in each category?



How many articles of each type do we have for each audience?





Readability

★: 3

★★: 35

★★★: 139

★★★★: 158

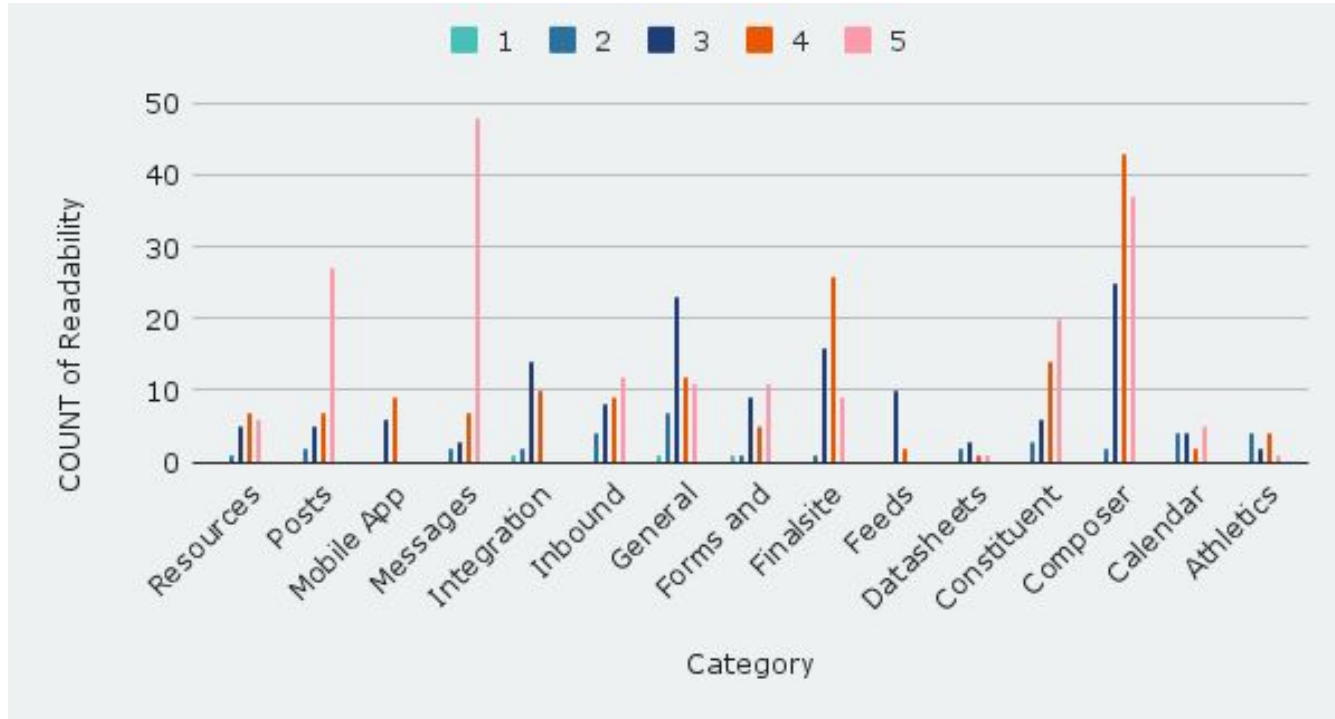
★★★★★: 188

Average grade level: 8.7

***Takeaways:** Readability scores were largely positive, but there are plenty of articles that can be improved by adding context, using plain language, increasing use of headers, and so on.*

A correlation exists between grade level and how many positive votes an article receives, so we should strive to write more of our articles at a grade 8 level.

Which categories have the best and worst readability scores?





Findability

★: 1

★★: 28

★★★: 91

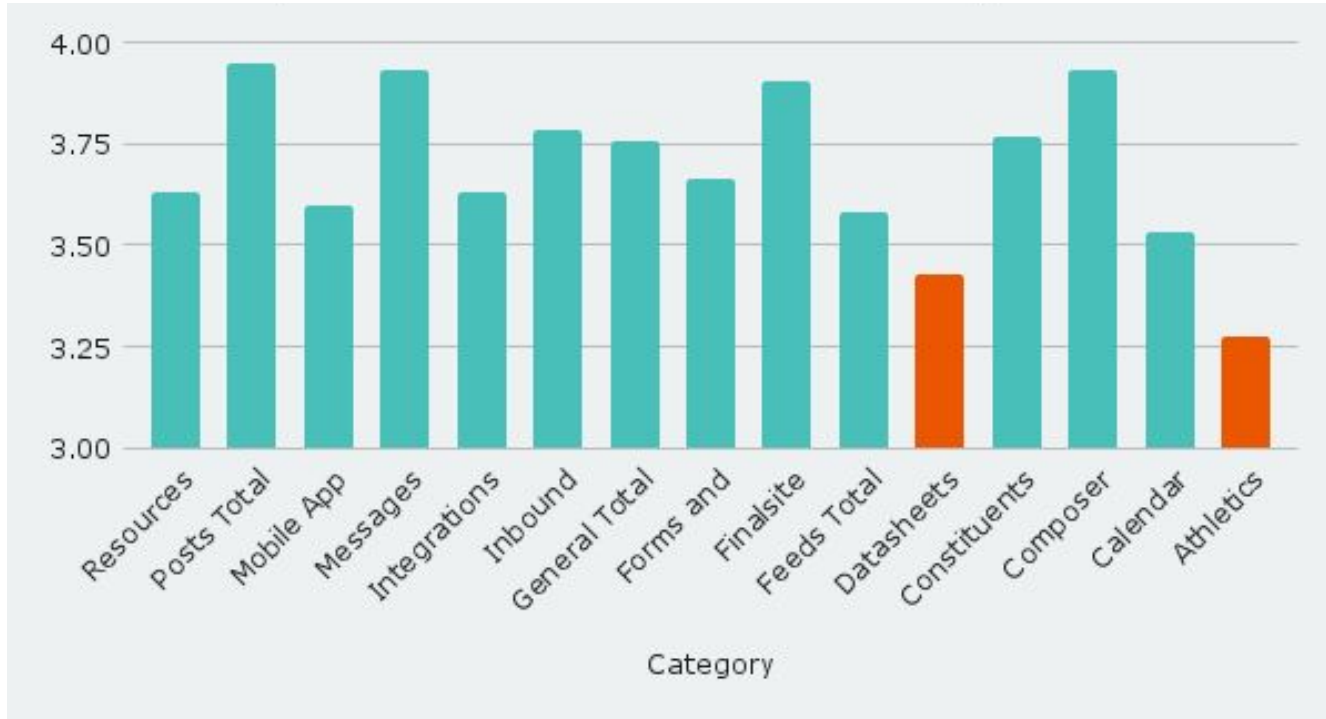
★★★★: 136

★★★★★: 267

Takeaways: *Measuring how easy it is to find an article with search is incredibly difficult. More research is necessary to find ways to measure this more reliably.*

Many articles about legacy modules had a higher-than-expected view count, which seems to indicate that users are clicking on them when they're trying to find info about our current modules.

Which categories have the lowest findability scores?





How many legacy articles have suspiciously high view numbers?

Article	Views 2021
Multimedia Manager average	470
Aspect Ratio, Dimensions, and File Size	6176
Supported multimedia file formats and types	3509
Recommended image size and resolution for MultiMedia Manager slideshow photos	1084
File Manager average	31
Uploading files or images to File Manager	137
Quick tip: Image is rotated incorrectly when uploaded	121
Registration Manager average	27
Display Registration Manager events	84
eNotify average	26
Troubleshoot recipients who are not receiving emails in eNotify	115
Upload a data sheet to a mailing list	67
News Manager	23
Displaying the URL of a specific News post	63
Page Manager	21
Adding Facebook "Like" buttons to pages or portal elements (Page Manager)	207



Favorability

Total positive votes: 743

Total negative votes: 591

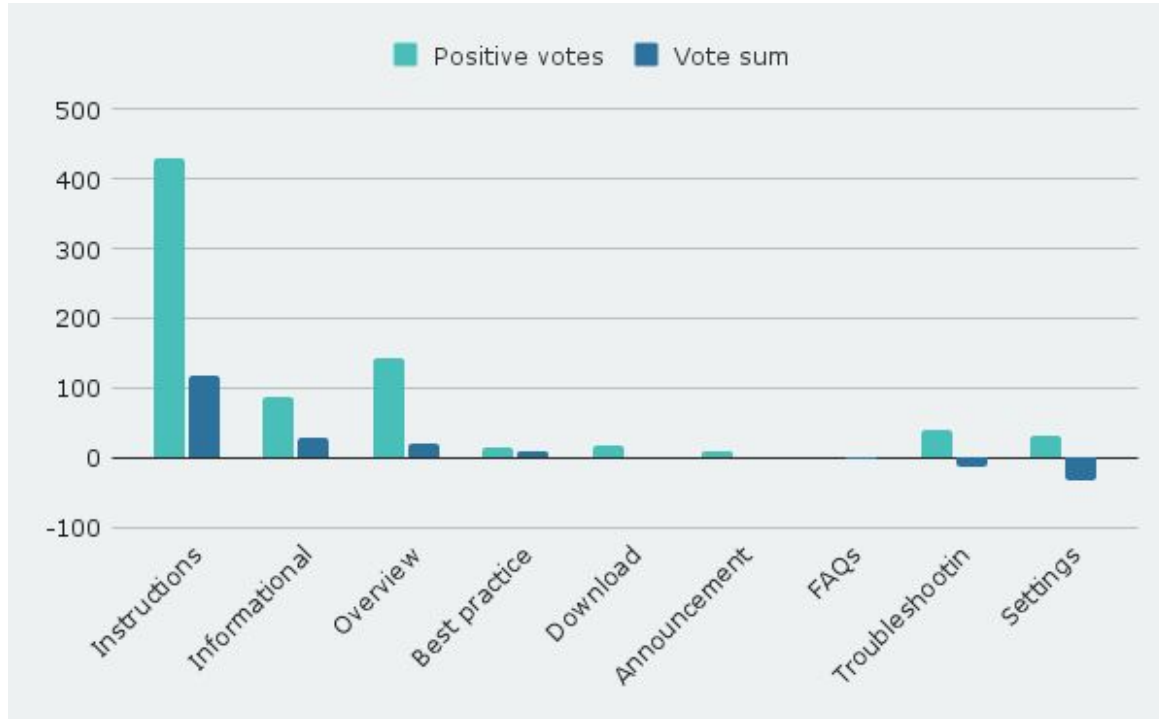
Highest votesum: Add alt text to images (15)

Lowest votesum: "Checking your browser before accessing" message (-9)

***Takeaways:** Our current tools make it difficult to assess how users respond to our articles. We should continue to research different ways to collect data, including user research.*

Some of our most-read articles are also some of our most-downvoted articles. We should examine them to figure out why, and then fix them.

Which types of articles have the most upvotes?





What are the most viewed of our lowest rated articles?

Article	KB views 2021	Positive votes	Total votes	Votesum
Add and remove admin users	254	3	10	-4
Page banners	231	3	11	-5
Resource element	184	1	9	-7
Redirects Manager	170	1	4	-2
Galleries	163	3	9	-3
Embed element	135	1	4	-2
Display resources with a post	127	1	8	-6
Restore a page	114	2	11	-7
Navigation element	110	1	3	-1
Container element	87	2	9	-5
Messages dashboard	84	1	3	-1

The background is a solid teal color. In the top-left corner, there is a decorative graphic consisting of three vertical bars of increasing height, each made of three overlapping circles. In the bottom-right corner, there is a similar decorative graphic consisting of four vertical bars of increasing height, each made of three overlapping circles.

Strategic opportunities



Small wins for existing content

1. Empower self service for all types of users.
3. Improve search capability and labeling.
6. Develop a structured maintenance workflow to keep content up to date.

- Create [module manuals](#) to improve search results.
- Improve the most viewed/most disliked articles.
- Update screenshots and make sure images have alt text.
- Redesign stylesheet for article pages to help readability.
- Revisit style guide to improve consistency of communication.



Revisit and realign categories with significant issues

1. Empower self service for all types of users.
2. Add best practices, thought leadership, and other higher-level content to our offerings.

The following categories have high levels of inaccuracy and negative votes, or they haven't been updated recently:

- Composer
- Finalsite Learn and Groups
- General
- Posts
- Messages



Target resources for specific audiences and journey stages

1. Empower self service for all types of users.
2. Add best practices, thought leadership, and other higher-level content to our offerings.
4. Create a structure that is easy to browse and discover.

How do we define and target our audiences at different user levels and different stages of the user journey, including:

- Information architecture
- Writing style/readability
- Types of articles
- Content channels



Develop procedures to keep content fresh and up-to-date

5. Develop a structured maintenance workflow to keep content up to date.

How do we involve a larger team in maintaining and optimizing existing content as well as creating new?

Procedures to consider:

- Big product releases
- Release cycle updates
- Known issues and announcements
- Regular review of all articles



Explore ways to gather search and favorability data

6. Establish metrics to gauge the effectiveness of our tactics.

How can we collect data to gauge content effectiveness using Google Analytics, Zendesk Explore, or other products?

How can we collect feedback from users and stakeholders?

- Surveys
- Stakeholder interviews
- Feedback form
- Slack channel

Next steps





Where do we go from here?

- **Right now:** Vision statement workshop activity
- **Project:** Small wins in the KB (seeking volunteers!)
- **Continue research:** User survey and internal interviews
- **Continue audit:** LMS
- **Next meeting:** Connect content to user journeys

What have I missed?

Any questions? Feel free to slack me later!





Workshop



Core strategy statement

“Without strategy, content is just stuff, and the world has enough stuff.”



Vivid

Inspirational

Significant

Infectious

Out of the
ordinary

North star

Questions to answer

- **Content product:** What product should we produce, procure, curate, and share?
- **Audience:** Who, specifically, is that content for?
- **User needs:** Why do those audiences need or expect that content from us?
- **Business goals:** What outcomes does providing this content help us achieve?



Content strategy Mad Libs

<Organization, Department, Property, Section> helps our
company accomplish **GOAL** and **GOAL** by providing
DESCRIPTIVE WORD OR PHRASE and **DESCRIPTIVE**
WORD OR PHRASE content that makes **AUDIENCE** feel
EMOTION OR ADJECTIVE and **EMOTION OR ADJECTIVE**
so that they can **DO THIS THING** or **DO THIS THING**.

Thank you

Let's continue this conversation in Slack, and get excited for our next meeting!

Appendix





Articles with O or H status by category

Category	Have to write	Outdated
Composer	27	33
General	21	18
Posts	7	6
Constituents	5	16
Calendar Manager	4	6
Mobile App	4	11
Datasheets	3	4
Finalsite Learn	3	6
Resources	3	7
Feeds	3	8
Integrations and SSOs	3	11
Athletics Manager	2	6
Forms and Payments	2	8
Messages	2	9
Inbound Marketing	0	7
Total	89	156



Article audience per category

Category	Admin	Superadmin	User
Composer	72	12	26
Constituents	28	12	3
Inbound Marketing	28	0	12
Messages	26	13	21
General	23	22	9
Posts	18	14	12
Forms and Payments	14	4	9
Feeds	12	1	0
Mobile App	11	4	0
Athletics Manager	8	1	2
Calendar Manager	8	1	6
Resources	8	1	10
Integrations and SSOs	5	22	0
Finalsite Learn	2	16	34
Datasheets	0	7	0

Article types by category

Category	Instruct.	Overview	Settings	Info. only	Best prac.	Trouble.	FAQs	Download
Composer	43	33	34	1	4	2	0	0
Finalsite Learn and Groups	39	2	1	10	0	0	0	0
Posts	26	8	2	3	7	0	0	0
General	23	9	0	8	8	5	3	0
Constituents	23	4	16	2	1	1	0	0
Messages	22	16	16	3	3	1	1	0
Inbound Marketing	19	3	0	5	9	0	0	0
Forms and Payments	17	5	4	3	2	0	1	0
Calendar Manager	10	0	2	2	1	0	0	0
Athletics Manager	9	1	0	1	0	0	0	0
Resources	7	9	0	2	3	0	0	0
Mobile App	7	0	0	0	8	1	1	0
Feeds	6	4	1	0	1	2	0	0
Integrations and SSOs	4	21	0	2	0	2	0	0
Datasheets	0	0	0	0	0	0	0	7



Article types by audience

Type	User	Admin	Superadmin
Instructions	75	127	64
Settings	14	52	11
Overview	30	50	40
Best practice	13	26	10
Informational	14	18	11
Troubleshooting	4	10	0
FAQs	1	4	1
Download	0	0	7

Readability scores by category

Count of Readability		Readability			
Category	1	2	3	4	5
Resources		1	5	7	6
Posts		2	5	7	27
Mobile App			6	9	
Messages		2	3	7	48
Integrations and SSOs	1	2	14	10	
Inbound Marketing		4	8	9	12
General	1	7	23	12	11
Forms and Payments	1	1	9	5	11
Finalsite Learn and Groups		1	16	26	9
Feeds			10	2	
Datasheets		2	3	1	1
Constituents		3	6	14	20
Composer		2	25	43	37
Calendar Manager		4	4	2	5
Athletics Manager		4	2	4	1



Average findability by category

Category	Average of Findability
Datasheets	3.43
Calendar Manager	3.53
Feeds	3.58
Mobile App	3.60
Integrations and SSOs	3.63
Resources	3.63
Forms and Payments	3.67
General	3.76
Constituents	3.77
Inbound Marketing	3.79
Finalsite Learn and Groups	3.90
Messages	3.93
Composer	3.93
Posts	3.95
Athletics Manager	3.27
Grand Total	3.80



Article upvotes by type

Type	Positive votes	Vote sum
Instructions	430	118
Informational only	87	28
Overview	142	20
Best practice	15	10
Download	16	0
Announcements	8	0
FAQs	0	-2
Troubleshooting	40	-12
Settings	31	-34