From Chaos to Clarity:
Improve your library’s web presence with content strategy

Presented by Beatrice Downey & Robin Camille Davis

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Who we are

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Say hi in the chat!

Before we get started, we want to see where you are joining us from.

Hello, from Raleigh, NC!
Overview

● What is content strategy?
● Applying user personas
● Creating a content roadmap
● Collaborating productively
● Q&A
Join the conversation!

Comments, ideas, similar stories? Share in the Chat!

Questions? Use the Questions tab!
Poll

What is your level of experience with content strategy?
What is Content Strategy?
Content Strategy

**Content strategy** is the ongoing practice of planning for the creation, delivery, and governance of useful, usable, and effective content about a particular topic or set of topics.

Our project development process

This is where content strategy happens (mostly)
Content work

🌟 Creating new content

- Begin with gathering information, addressing needs and problems (aka the discovery phase).

📝 Refreshing content

- Make a list of current content to review and audit.
- Consider what needs to be archived, deleted, or unpublished.
Audit: What’s out there?

Make a spreadsheet with these columns:

Title of page
Page URL
Last modified date
Author/owner
Keep as is, Revise, or Unpublish/Delete
Example of a content audit

<table>
<thead>
<tr>
<th>LibGuide name</th>
<th>Last modified</th>
<th>Author</th>
<th>Recommendation</th>
<th>Views 2021-22</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Research</td>
<td>2020-01-26</td>
<td>SM</td>
<td>Revise</td>
<td>8,604</td>
<td></td>
</tr>
<tr>
<td>Eighteenth Century Research</td>
<td>2019-03-02</td>
<td>CP</td>
<td>Revise</td>
<td>503</td>
<td>Consolidate with History in a new subpage</td>
</tr>
<tr>
<td>Organic Chemistry Lab Literature Searching Assignment</td>
<td>2016-12-09</td>
<td>AK</td>
<td>Unpublish</td>
<td>114</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>2022-09-29</td>
<td>CM</td>
<td>Revise</td>
<td>394</td>
<td></td>
</tr>
<tr>
<td>Civil Rights</td>
<td>2024-03-26</td>
<td>CA</td>
<td>Keep as is</td>
<td>3,616</td>
<td></td>
</tr>
<tr>
<td>Literary Criticism</td>
<td>2021-05-02</td>
<td>VL</td>
<td>Revise</td>
<td>1,985</td>
<td></td>
</tr>
</tbody>
</table>

We found pageviews to be a useful column. Outdated content + low page views = unpublish.
After
lib.ncsu.edu/scrc
Applying User Personas
User personas & jobs-to-be-done

User Personas
“A fictional, yet realistic, description of a typical or target user of the [website]. A persona is an archetype instead of an actual living human, but personas should be described as if they were real people.”

Jobs-to-be-done
“A framework based on the idea that whenever users “hire” (i.e., use) a [website], they do it for a specific “job” (i.e., to achieve a particular outcome). The set of “jobs” for the [website] amounts to a comprehensive list of user needs.”

— Nielsen Norman Group
<table>
<thead>
<tr>
<th>Who are the users of this page?</th>
<th>What are users trying to accomplish by going to this page?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personas</strong> with details. Representative but not exhaustive. Not in any order.</td>
<td><strong>Jobs to be done.</strong> They go to your page in order to…</td>
</tr>
<tr>
<td>Students new to archival research</td>
<td>Complete requirement for a class</td>
</tr>
<tr>
<td></td>
<td>Search for known or unknown items</td>
</tr>
</tbody>
</table>
Understanding your users

Everyday interactions

- Take note of user interactions, feedback, and frequently asked questions.

User research

- Get intentional user feedback through surveys, interviews, usability tests, etc.

lib.ncsu.edu/projects/category/User-Research
Known pain points

**Pain Points** are problems in the user’s experience with a product or service.

- Frequently asked questions can be indicators of pain points for users
- User research can help you identify pain points
- Jot down pain points while discussing user personas and jobs to be done
Poll

Have you utilized any of the concepts that we just talked about?
Creating a Content Roadmap
From personas to goals

Once you have your user personas and their tasks, decide **what your goal is for those users.**

This is where *staff* perspective comes in, keeping *users* in mind.
Example goals

Here’s an example from our Special Collections content strategy.

Persona:

- A student who is totally new to archival research is working on a class assignment that requires using a primary source.

Our goals for that persona:

- Convey a sense of welcome
- Show off what we have! Give newbies a cue about what our collections contain
From your goals, derive your functional requirements

State the *specific thing* you need to achieve each goal. Finally, we’re talking about what goes on the page itself.

Functional requirements could be…

- Photos
- Text
- Interactive feature
- List of things/people to highlight
## Examples of functional requirements

<table>
<thead>
<tr>
<th>Goals</th>
<th>Functional requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convey a sense of welcome</td>
<td>2-4 sentence description of what the Special Collections is, who can use it, and what they have. Use plain language as much as possible.</td>
</tr>
<tr>
<td>Show off what we have! Give newbies a cue about what our collections contain</td>
<td>Identify 3-6 collections to highlight prominently with visual tiles/images, with a short description and link.</td>
</tr>
</tbody>
</table>
Ta-da! You have a checklist!

The functional requirements can now be put into their own standalone document.

They form a checklist of the things you need to put your page together.

★ Our tips: number each item, and assign each item to a person.

Functional requirements

A checklist for what should be on the new /scrc landing page. Some of these elements are already on the current /scrc page. These are sort of in order of most to least critical for this redesign. They are adapted from the table below.

We'll discuss whether anything is missing or could be omitted.

We discussed and edited these notes at our July 26, 2023 meeting.

1. Highly visual (but not overwhelming) layout
2. Prominent search box for Historical State that includes:
   a. Blurb noting what's searched and that it includes digital collections, finding aids (collection guides / ArchivesSpace), timelines, blog, special collections as location for the catalog
   b. Example search query
   c. "Search Special Collections"
3. Identify 3-6 collections to highlight prominently with visual tiles/images, with a short description and link
   a. If possible, these should appeal to people from diverse disciplines
   b. Ensure it's not confusing: where are ALL the collections?
   c. Include tile (with blurb) or link for Collecting Areas
   d. Initial ideas: Animal Rights and Humane Society, Extension Services / Ag, Rare Book(s), U Archives, Matsumoto, Kofi Boone
4. A 2-4 sentence description of what the SCRC is, who can use it, and what they have. Use plain language as much as possible
   a. Link to Mission & Values
### The big example table

<table>
<thead>
<tr>
<th>Who are the users of this page?</th>
<th>What are users trying to accomplish by going to this page?</th>
<th>What are the main objectives for this page?</th>
<th>Functional requirement for the /scrc homepage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-NC State Users</td>
<td>Access digitized materials (true for all user personas)</td>
<td>Make it clear how to get to the digital collections</td>
<td>Prominent search box for Historical State that includes:</td>
</tr>
<tr>
<td>Researchers</td>
<td>Requesting materials (true for all user personas)</td>
<td>Make it clear how to request materials, and who can do that</td>
<td>Blurb noting what’s searched and that it includes digital collections</td>
</tr>
<tr>
<td>Other library (special collections) professionals</td>
<td>Usually found via finding aid or digital collections</td>
<td>Have a “wow” factor: our special collections page should stand out compared to other libraries</td>
<td>Example search query</td>
</tr>
<tr>
<td>People writing a dissertation or a book</td>
<td>Find location of the rare books reading room (true for all user personas)</td>
<td>Make it clear how to find the SCRC — that we have a reading room that people can get to</td>
<td>Prominent request button</td>
</tr>
<tr>
<td>Found from Google search</td>
<td>Find address, directions, parking Planning visit</td>
<td></td>
<td>Highly visual (but not overwhelming) layout</td>
</tr>
<tr>
<td>Students totally new to archival research</td>
<td>Completing requirement for a class “Use something from SCRC / primary source in your project” Visit reading room Searching for known or unknown items Using terms that are not in our materials</td>
<td>Welcome first-time users Provide a blurb or link to a welcoming page for first-time users Make it clear how to search our collections Provide example search</td>
<td>2-4 sentence description of what the SCRC is, who can use it, and what they have. Use plain language as much as possible</td>
</tr>
</tbody>
</table>

Identify 3-6 collections to highlight prominently with visual tiles/images, with a short description and link
P.S... Use a web style guide

- It contains best practices and good examples
- Point your content-creating stakeholders to it
- Don’t have one? Use ours ([link](#)), use another institution’s, or make your own!
Web style guide: examples

Voice
The Libraries' voice is our overall personality: business casual. We are professional but not stuffy.

Links: tell users where they're going
Use descriptive link text. Rather than pasting in a “naked” URL or linking the phrase “click here”, name the item you're linking to.

Ebook
Ebook at the start of a sentence, ebook in the middle of it. Never eBook or e-book.
What comes next?

Wireframing, design, and implementation
Content maintenance
Make a plan for updating content

Short-term plan: What still needs to be edited?

Long-term plan: Who “owns” each piece of content, and can they commit to reviewing it regularly to ensure it’s up to date?

★ Our tip: Set an annual reminder to review the content.
Deleting content

Deletion (or unpublishing/archiving) is the natural end of the content lifecycle!

Delete content when it is:

- No longer useful or accurate
- No longer adhering to content standards
- Time-consuming to fix, yet not urgently needed
Examples of content we’ve gleefully unpublished

- Outdated policies from the start of COVID-19
- Research guides that had been untouched since 2017
- Abandoned pages with no clear owner
- FAQs that were just 2-word links to other pages
Examples of content upgrades
Web form:
before
Request a review of your library fines

You can use this form to request a review of charges incurred for overdue, damaged, or lost materials or materials that you believe you have returned. Please read "Petition/Appeal Process" before submitting this form.

Send questions or comments to the Access Services Department (library.appeals@ncsu.edu).

* indicates required field

Your name *

Your Unity or Borrower ID *

Your email address *

Your phone number *

What is your campus affiliation? *

- Undergraduate student
- Graduate student
- Staff
- Faculty
- Non-NC State University borrower

What is your concern? *

- I want to know more about why I was charged this fee (most common)
- There were extenuating circumstances that prevented me from returning the item(s) on time (describe below)
- I'd like to appeal a decision made about a previous review of my library fines
- Something else (describe below)
Ask Us page:

Chat
Get immediate help from a real person on our libraries staff (no bots!).
Chat Now →

Email
Get help by sending us an email. We usually respond within 24 hours on weekdays.
Email Us →
library_askus@ncsu.edu

Consult
Get one-on-one help by requesting a consultation.
Research consultation →
Tech consultation →
Data science help →

Drop In
Our Ask Us desks are all-in-one centers for getting help.
Stop by and see us at the Hill, Hunt, Design, Natural Resources, and Veterinary Medicine Libraries.

Call
Get help by giving us a call.
(919) 515-3364

Text
Get help by sending us a text message.
(919) 627-8031

FAQs
Search our extensive list of frequently asked questions.
Homepage, links to spaces & technology: before
Homepage, links to spaces & technology: after
Collaborating Productively
Ideal team size: 2–6

Any more than that becomes unmanageable.

Not every librarian has to be part of the content strategy process. Find ways to get input and feedback from colleagues who aren’t on your content team.
Set team goals from the start

These should be broad, overarching goals that include scope but nothing specific.

You’ll refer to these goals during your discussions.
Examples of team goals

**Good example:** We will redesign our homepage, taking a user-first perspective and conveying a sense of welcome.

**Bad example:** Our page will have a photo of the reading room and a big search box. We’ll promote our research guides prominently.
Disagreement? Uncertainty?
Get more information or data

“Let’s do user testing and return to this once we know more about users’ expectations.”

“Let’s look at web analytics data to help us understand how this content gets used.”

“Let’s ask the person most familiar with this scenario.”
What to do when stakeholders don’t understand each others conventions or needs

- Make your goals clear and be upfront about your process.
- Conduct user research to pinpoint the need for improved content.
- Encourage the stakeholders to be involved in user research.
What to do when a colleague consistently gets the wrong idea

Establish the scope of the project

- Communicate clearly what the scope of this content strategy process is and is not about.

Use the parking lot

- Place out of scope topics in the parking lot.
- These topics can be addressed with a new project.
What to do when a colleague derails conversations

- “It sounds like we’re getting a little off-track.”
- “I see that we’re running short on time. Is it okay to table this part of the conversation for later?”
- “Thank you for that context! To take the user’s perspective for a moment…”
- Send follow-up emails (include notes) after meetings to reiterate discussion points, and to-do items for the next meeting.
Scheduling tips

● Don’t do this all asynchronously. Have at least a couple of meetings.
● Schedule regular meetings in advance, e.g.:
  ○ Every 2 weeks for the fall semester
  ○ 3 meetings, plus a “just in case” one
● Create a meaningful agenda for each meeting
  ○ Send it at least day in advance
What else helps a content-focused team project to be successful?

In the chat, share advice about meetings and things you find helpful to do when you’re collaborating with a team that creates content.
Content Strategy
Meetings

(You might not need all of these types of meetings)
Content strategy kick-off meeting

Start compiling personas and tasks (a whiteboard is helpful).
Finish the table asynchronously

Begin with a whiteboard...
...complete the table afterward
Functional requirements meeting

Discuss the checklist draft, created asynchronously since the last meeting.

Who will take care of each item on the list?
Environmental scan meeting

Look at similar websites or web pages.
What do you like?
What don’t you like?

Some of the websites we looked at when we implemented a “hero” image on our homepage
Pre-launch meeting

Any last things to tidy up about the wireframe or final page before launch?

Have you tested the content to make sure links work, etc.?

Set a date for going live with the new content.
Wrapping Up
Content strategy review

- Set and clearly communicate the project’s goals and process
- Apply task-based user personas
- Derive objectives for users and functional requirements
- Plan how to maintain content
- Collaborate productively by...
  - Using shared goals to help keep your team focused
  - Gathering information and data to make decisions
  - Scheduling meaningful content strategy meetings
Q&A

Thank you for attending!
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