

Financial Services Product Content Strategy Map (EXAMPLE ONLY)

Business goals

- Double acquisitions in a year
- Increase customer engagement by 30%
- Increase product portfolio offerings
- Standardize communications across channels

Content inventory

- Sites/apps involved
 - Main product site
 - Mobile site
 - Customer management app
 - Marketing microsite
- Elements
 - Page title
 - Description
 - URL
 - Keep/Delete/Modify
 - Author
 - Owner
 - Metadata
 - Content types
 - Date modified

Gap analysis

- Current state review
- Future state needs
- Methods to address gaps
- Competitive analysis
 - Competitor 1
 - Competitor 2
 - Competitor 3

Content purpose

- Products
 - Acquire new customers
 - Describe offerings
 - Differentiate from competition
- Services
 - Provide help to customers
 - Support products within organizations
 - Get customers set up
- About
 - Provide company information
 - Provide contact information
- Education
 - Attract new hires
 - Help customers self serve
 - Provide thought leadership

Content Presentation Strategy

- Clear headers dividing content section
- Bullets outlining main points
- Progressively disclose information in paragraphs as needed
- Define terms with contextual help
- Visuals for primary features

Deliverables

- Content inventory
- Governance plan
- Editorial guidelines
- Metadata strategy
- Core messaging strategy
- Content templates
- Copy book

Governance

- Maintenance schedule
 - Quarterly monitoring of product pages
 - Weekly monitoring of pricing
 - Daily monitoring of community
 - Monthly legal reviews of updates
- Ownership
 - Writer
 - New content creation
 - Editorial review of updates
 - Voice/tone management
 - Social media manager
 - Daily monitoring of social channels
 - Product manager
 - Business goals
 - Stakeholder review process
 - Legal review management
 - Content strategist
 - Audit maintenance
 - Governance scheduling
- Communication plan
 - Status updates
 - Updated documentation
 - Change record

Voice and Tone

- Straightforward
- Concise
- Informative
- Everyday language
- Understanding
- Hint of prestige/exclusiveness

Themes

- Manage your finances simply through understanding
- Take the work out of picking a financial management strategy

CMS

- Content structure
- Adaptive content management
- Metadata strategy
- Manage workflow
- Tools
 - Wordpress
 - New tools under consideration

Workflow

- Roles
 - Content author
 - Content editor
 - Content manager
- Tools
 - Built-in CMS workflow management system
 - Accompanying spreadsheet for internal management
- Resources
 - Copywriter
 - Sr. Copy Editor
 - Director of Marketing