Improve blended learning programs by integrating content strategy processes.

bringing
content
strategy
into the blend

BY PHYLISE H. BANNER

The marketing industry has embraced content strategy as a framework for managing the content life cycle and determining how companies can leverage content to meet their business goals. Best practices in content strategy inform the creation, delivery, and management of content, and enable marketing teams to make targeted decisions related to those business goals.

Rahel Bailie, a leader in the content strategy arena, offers a succinct description: "Content strategy deals with the planning aspects of managing content throughout its life cycle, and includes aligning content to business goals, analysis, and modeling, and influences the development, production, presentation, evaluation, measurement, and sunsetting of content, including governance."

In other words, content strategy is the process of planning out the creation, arrangement, development, delivery, and management of appropriate, targeted content for a specific community. It's about getting the right content to the right people at the right time for the right reason.

That's a perfect strategy to integrate into our blended learning toolkit.

Quality blended learning solutions rely on careful planning and orchestration. Instructional methods, asset types, delivery modes, learner needs, workplace situations, and technologies need to be taken into consideration throughout the design, development, and delivery phases to optimize learner outcomes and facilitate workplace learning.

If our aim is to bring together different content types at different times to meet different objectives for different learners, we need a greater understanding of the *who, what, where, when, why,* and *how* that drive our blended learning initiatives. Content strategy can help us achieve that.

Content strategy approaches are as varied as content strategists, but three process domains guide the implementation of every content strategy: objective, content, and human. By examining each of those domains along with ways to implement them, we can frame an approach to integrating content strategy into the design, development, and delivery of blended learning.

The objective domain: Understanding the organization and learners

Before touching any specific learning content, we need to understand the culture of the organization. How ready is the organization to adopt a blended learning approach? How engaged are stakeholders in the design, development, and delivery of new learning initiatives?

We also need to know who the learners are—their characteristics, needs, responsibilities, challenges, constraints, and levels of commitment to the learning process. And we need to gain an understanding of where the individual learner sits within the larger organizational framework.

We are accustomed to getting to know our learners and exploring the learning culture as established processes in learning design. We currently do this through interviews, surveys, walkthroughs of existing assets/systems, and needs analyses. Layering the practice of content strategy on top of those processes means going a step further and transitioning the materials we have gathered into new tools and resources.

To implement your own content strategy in this domain:

Create learner personas. Learner personas are generalizations of characteristics designed to provide insight into your learners and the organization as a whole. They describe learner attributes, perspectives, failure points, expectations, and ways that learners interact with learning, answering questions such as:

- Where do you do most of your work and related learning?
- What gets in the way of your learning?
- What are your personal professional goals?
- What motivates you to learn?
- Where do you turn to find answers to questions or help when you need it?

As you survey or interview your learners about their preferences, motivations, behavior patterns, attitudes, opinions, and pain points, you'll see patterns emerge that will give you a good idea of how many personas will be needed to represent your target learning community.

Develop scenarios or use cases. Scenarios and use cases can help develop contingency plans by detailing situations that can, and do, arise. They also establish a common language for discussions between teams. A scenario should include at least one character, situation, and issue, and model actual situations within the organization. Be representative about what your learners are going through. What challenges are they up against?

Plot out learning journey maps. Follow your learners and keep track of their learning habits. Map out their actions and reactions as they progress through their day or learning experiences. A good learning journey map

identifies where and when learners engage with learning, highlighting motivations, milestones, and achievements.

Introduce an organizational readiness matrix. Work with stakeholders to assess where they are today, and where they want to be in the future. Relate to guidelines on how they can evolve in areas related to learning culture, organizational support, technology infrastructure, and resource availability.

The content domain: Establishing substance and structure

Substance refers to the learning content itself, along with purpose and context. We need to know what content we have (and don't have), what relationships exist between content pieces, and what message we are trying to get across by presenting this content in a blended format. We also need to understand the language of our content, and how we can leverage that language behind our content (metadata) to better meet the needs of learners.

Structure refers to the organization, prioritization, format, and architecture of content. We need to establish the pathways, detours, shortcuts, and delivery vehicles for our content. This process is about defining and influencing how learning will be structured and sequenced, including a balanced blend of when it is taking place, where it is taking place, and how it is being delivered.

To implement your own content strategy in this domain:

Carry out a content inventory/audit/analysis. Inventory existing content and establish a

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Case Study: The InSync Blended Learning Hub

About the team: In 2000, InSync Training began a tradition of leadership in the training field by researching, vetting, and promoting best practices in the virtual classroom while that technology was still emerging. It now extends that paradigm to the blended learning environment—one that contemplates a variety of instructional delivery methods, learner needs, and cognitive theories to optimize learner outcomes and facilitate modern workplace learning for the sponsor.

Objective: Design and develop a perpetual learning community space that models effective practices in modern blended learning.

Solution: Develop a content strategy to guide the design, development, and production of the InSync Blended Learning Hub.

Challenges:
- Target audience demographic was extremely broad and hard to characterize.
- Existing content was stored and managed across many different systems.
- New learning asset content, structure, format, and delivery modes needed to be determined.
- Content life cycles and formal governance structures needed to be established.

Details:
- Integrated training on content strategy approaches into every stage of the design, development, and delivery phases, while introducing new content strategy processes across teams.
- Engaged directly with a wide-range sampling of training and development professionals to develop learner personas and learning community use-case scenarios.
- Developed a custom content architecture that could model and showcase effective practices in modern blended learning instructional design.

Results:
- The InSync team fully integrated content strategy approaches into the design, development, and delivery processes, resulting in a blueprint for content, structure, workflow, and governance of the InSync Blended Learning Hub.
- A content life cycle has been established for all elements of each learning campaign within the perpetual learning community framework, including editorial calendars, review schedules, and new content planning agendas.
- The newly established content governance structure enables InSync Hub writers, designers, and developers to respond quickly to feedback from the learning community and implement immediate change.

ADOPTING ESTABLISHED CONTENT STRATEGY PRACTICES … CAN MAKE OUR BLENDED LEARNING SOLUTIONS EVEN BETTER.

classification system, including such fields as file name, file type, file size, kind of learning asset, delivery mode, associated objectives, author, creation date, and last updated. Take it a step or two further by annotating the inventory with any analytics (data on assessments or usage) for a content audit, and provide an interpretation of that data as a content analysis.

Trade your gap analysis for a gap map. Turn your inventory, audit, and analysis into a gap map by establishing what you have, what you want to have, and how you will move from one point to another. This can be as simple as a table or timeline diagram. Then determine

what the learners will need at those key points. Remember to refer back to your journey maps and take learner habits into consideration.

Map the curriculum. Go a step further and create a curriculum map by associating objectives with each one of those key points on your gap map. That will help you see where you need more (or less) learning content to support specific objectives.

Establish a taxonomy. Classify and tag your learning content with consistent terms that exist in your work and learning cultures. That establishes relationships and hierarchies and can help with sharing and search functionality when you publish your learning content.

The human domain: Defining workflow and governance

Workflow processes expose what is needed to support the design, development, and delivery of content. Here is where the content life cycle is brought to light, including anything that needs to be in place to ensure delivery and ongoing support. Governance processes assign responsibility and authority to determine who makes decisions about content, who has authority to make changes, who manages the communication flow, who has the final say, and who will take the blame when anything (or everything) goes wrong.

As blended learning designers, developers, facilitators, producers, and managers, it is critical that we actively embrace and integrate this human domain of content strategy into the blended learning arena. Partnering with the learning organization means establishing workflows and governance models so that we can effectively manage blended learning life cycles and report back on where we are and how we are doing. This is where we can set a process in place that champions accountability and enables us to learn from, replicate, and scale successful learning initiatives.

To implement your own content strategy in this domain:

Implementing Content Strategy Within the Three Process Domains

Organization and Learners
- Create learner personas.
- Develop scenarios or use cases.
- Plot out learning journey maps.
- Introduce an organizational readiness matrix.

Substance and Structure
- Carry out a content inventory/audit/analysis.
- Trade your gap analysis for a gap map.
- Map the curriculum.
- Establish a taxonomy.

Workflow and Governance
- Establish a content life cycle.
- Develop operational standards and decision protocols.
- Detail out communication channels.
- Appoint an advisory team.

Establish a content life cycle. Create an editorial calendar that includes each phase of design, development, and delivery of learning content. Include review and revision timetables along with the people responsible for seeing through the completion of each phase. And remember to include your content strategy deliverables, such as personas, scenarios, and content inventories.

Develop operational standards and decision protocols. Even a simple org chart can serve as a decision protocol. Determine and diagram the chain of command, and include contingency plans in case key decision makers are unavailable. Detail any step-by-step processes that need to be strictly followed.

Specify communication channels. Knowing who to call for what is part of any successful communication strategy. Include tips for communicating with stakeholders as well as learners.

Appoint an advisory team. Your advisory team should include at least three people who are involved in the learning culture and understand the mission and business goals of the organization. The purpose of the team is to provide insight into the learner experience, identify obstacles or opportunities to enhance the learning experience, and provide feedback on your overall content strategy.

The content strategy blueprint

When we create modern blended learning, we are working with many parts—including people, content, and processes. When we intentionally implement a content strategy alongside that creation process, we establish a blueprint for success.

Javon Bell at Reusser Design says, "Without content strategy, there's no purpose for design. It's the first step in our process because it's the first thing that people see when it comes to visual communication. Content strategy is the blueprint for every project and that's not limited to digital platforms. Without the initial strategy in a project, you won't have a solid execution of the remaining factors—no matter how good your design is. Even if you think you're not using content strategy, you are."

I would agree that even if we think we are not, we are using content strategy within the blended learning space, and go a step further and posit that adopting established content strategy practices, including domain artifacts and deliverables, can make our blended learning solutions even better.

Think about the relationship that a set of blueprints has with a finished building. Do people who live, work, visit, learn, play, heal, and pray in that building typically look at those blueprints? No; they experience the building.

When content strategy is done well, no one notices that it's there. They are too engaged with the experience—which is exactly what we want from our learners.

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