Story Mapping

Managing the Creation of Content-Driven Experiences

By Robert Rose, Chief Strategy Officer, Content Advisory

STORY MAPPING: MANAGING THE CREATION OF EXPERIENCES

> *"If you want a happy ending, that depends, of course, on where you stop your story."*
>
> —Orson Welles

In our experience, there is no shortage of innovative ideas in companies. However, a huge wealth of ideas never gets a chance to be expressed.

Leadership in companies often talks the talk of innovation, but rarely walks the walk. A great example of this comes from the world of PR agencies. We all know that for the last 10 years, the PR agency business has been under a fundamental disruption. One senior manager in one of the largest PR agencies in the world recently told us:

> *"We often have all-hands meetings where senior management gives a very inspirational speech, about how we must be innovative and deliver new content marketing, and strategic social media solutions to our clients. And then, once the speech is over, we all go back to our cubes and try to get reporters on the phone to get coverage for our clients."*

Companies want their marketers to be innovative—you know, as long as they can prove ROI on that innovative new thing they want to try.

Innovation just isn't built into the DNA of most larger companies these days. Most middle managers make senior manager by simply operating more efficiently than others in the organization. They sell incrementally more, they convert incrementally better, they hire incrementally better agencies, and achieve incrementally better financial results. This takes absolute discipline and focus, no doubt. But it does not lend itself to a culture of innovation.

As Peter Drucker said back in 1985 in his classic article, "The Discipline of Innovation":

> *"Innovation is the specific function of entrepreneurship, whether in an existing business, a public service institution or a new venture…."*
>
> *"Most innovations, especially the successful ones, result from a conscious, purposeful search for innovation opportunities, which are found only in a few situations."*

Every innovative initiative starts with an idea and content-driven experiences are no exception. Whether they are driven by a member of the social media team looking to make a social channel more relevant, or by the demand-generation team seeking to make

B2B sales processes more efficient, or maybe even the public relations team looking to create a more compelling corporate brand story—the idea is a seed that either gets germinated or squashed.

As we discussed in Chapter 6, part of the role of the CCM group is to provide both a forum and an incubator for these ideas. But simply brainstorming, while fun and often *very* productive, can often lead to a list of great ideas that end up abandoned for a host of reasons.

Typically, innovative experience ideas are killed because of excuses such as "that's not how we do things" or "that will never get sales support." Other reasons include:

- They seem too complex.
- Buy-in was never obtained from the executive suite.
- The ideas made it to the execution stage, but never met estimated measurement goals, so they were dropped a year later.
- Truly innovative ideas are stuck in small sandboxes. Far too often, a completely transformative idea is trapped inside a single white paper because that's how it was first conceived.

To make the creation of content-driven experiences a scalable and manageable process, we need a structure for creating and mapping ideas—along with a way to estimate the value of those ideas among the projects being considered. Story mapping is a great way to create that structure.

Why Call it Story Mapping?

The term *story mapping* is used in a number of past and current contexts. It is most predominant as a component of Agile software development, where it refers to the idea of grouping user "behaviors" (or stories) as a workflow to describe how software should behave. This is, in turn, a byproduct of the "Extreme Programming" movement in the late 1990s, which employed user stories (or use cases) as a way to develop products.

Today, the practice of story mapping in software development enables architects to arrange the user "stories" into models that help them understand how the broader functionality of a larger software product should be developed. It helps establish a context for the developers to identify gaps or omissions in the development—and more effectively plan for larger releases or versions of the product.

Additionally, story mapping is a term used by those in the creative narrative space. From screenwriters to playwrights to novelists, the term is used to describe how to effectively map (usually in some graphical template or outline form) the key elements of the story's characters, setting, conflict, major plot points, and resolution development.

In our approach to mapping content-driven experiences, we're using the spirit of both the software and narrative contexts to create a high-level story structure. For us, the story map and the story mapping process enable a CCM-focused team to add a structural form to a larger creative idea about engaging a specific audience.

As we've said before, CCM is an ongoing process. In order to sustain this managed process, as well as to scale it as a functional piece of the business, each initiative (just like every product development) needs a structure, a purpose, and (perhaps most of all) a way to measure the value created.

In short, the marketing organization (or the CCM governing body within it) starts to operate not *like* a media company—but *as* a media company. It manages a portfolio of one- or multiple-owned experiential platforms that create value for audiences. The CCM story mapping process is a method to create the clear structure and to define the experiences that make up the portfolio.

Parts of our story mapping process will be familiar territory to those who follow Agile methodologies, the work of Eric Ries and his Lean Startup approach, or the work of Rita Gunther McGrath and the Discovery Driven Growth idea. We also borrow heavily from some of the story development and structure best practices presented in Christopher Vogler's book, *The Writer's Journey*: *Mythic Structure for Writers*. Vogler's book is, in turn, a reinterpretation of the famous work, *The Hero with a Thousand Faces,* by mythologist Joseph Campbell.

Of course, we've also adopted many successful and sticky "best practices" that we've observed while conducting research on brands and working with hundreds of large companies in our consulting engagements.

The Guiding Principles of Story Mapping

Story mapping has three distinct parts:

1. THE WHY (we always start with WHY)—Our content mission. We begin with a content mission that provides the creative editorial heart, which helps to align the larger story of our brand with this specific initiative. Put simply: This is the value we will deliver to our audience. Additionally, we define who will receive this value—and why they will care. Finally, we determine how this experience will be different than what is generally available out in the marketplace of ideas.

2. THE WHAT—Our business mission. This starts with our business goal, which answers the questions, *"What does success look like? When should it be achieved?"* We'll discuss this further in Chapter 10, but this is where we differentiate the success of the initiative from its contribution to the business. We also define how the initiative will integrate into other parts of the business, and how it will serve cross-functionally.

3. THE HOW—Our proposed map. The map illustrates how we will approach the initiative over time. Here, unlike outlining a campaign, we are planning for product development. In short, we are planning the first modules of a permanent space station, not a mission to orbit the Earth and come home.

We then bring into this map our purpose-driven content strategy to determine how we will creatively tell our stories over time. We ask ourselves what kind of content balance between the four archetypes we will need:

- How much promoter content will we need to promote this new initiative—and over what time period?

- How will preacher content fit? Will we use it to evangelize this new idea or infuse it into the platform, or both?
- Will we need professor content (thought leadership or how-to content) at this point? Maybe not.
- Will we need poet content to bond emotionally to our audience? Or, will this be purely educational?
- Or, most importantly, how will each type of purpose-driven content play a role in the success of the initiative?

Then, by taking the next three key ingredients in order, we can develop a clear proposal for an initiative so that our CCM Team can make a sound business decision on how to implement and manage it as a key piece of the portfolio of experiences.

The outline of this proposal might look like this:

1. **The Content Experience Mission, with three distinct parts**
    - What is the valuable experience, separate from our product or service, that we can deliver? At what stage of the audience's journey with our brand?
    - Who is this value for? What is the audience persona we are trying to reach?
    - What makes OUR approach to delivering this value unique?

2. **The Business Goals, with three distinct parts**
    - What does success of the initiative look like? How will it contribute to the business? Does the initiative have more than one business goal?
    - What are the business goals? How long will it take for each goal to be met?
    - How will the initiative integrate into the overall business strategy (marketing, sales, customer service, PR, etc.)?

3. **The Story Map, a phased rollout over time**
    - Narrative outline—How will the elements of the story be introduced over time?
    - Business goal phases—How will we demonstrate progress toward both the success of the initiative and its potential for meeting the business goal(s)?
    - Purpose-driven content—How will the balance of content needs change over time?
    - Channel strategy—How will different channels be used over time? Where will integration into existing content channels be required?

A Framework, Not a Template

The critical idea to understand is that this is a framework, not a template. Some of these initiatives may be more relevant than others. Or, other content platforms may be introduced during different parts of the story mapping process.

For example, the business may decide that instead of *building* an owned media platform (such as a blog or print magazine), it makes more sense to actually buy an existing publication that already has a built-in audience. Or, there may be a merger in which two companies suddenly find themselves managing one or more existing platforms. Or, there may be an existing platform or effort that exists, and the task for the CCM group is to create a "reason" for it to exist.

In all these cases, many of the ingredients listed above can be an important factor in determining the ongoing viability and/or operating model for the platform. In short, it can

be useful to go through all the steps, even though a new platform is not necessarily being created.

Additionally, if the new project is quite large (as we'll cover later), there may be a reason to try a "pilot" to test some of the initial assumptions prior to investing in a full-blown project. Conversely, not every project needs to go through such a stringent process. If the effort is small, or is designed to be temporal or seasonal, many of these ingredients can be skipped and/or truncated.

The benefit of the story mapping process is its ability to communicate and represent an experience *before* it is actually developed. Its ultimate purpose may be to serve as the business case or "project vision" for a company. A great story map can be an effective way to make sure that every function in the business is represented and that everyone buys into the vision of what the experience will deliver.

IMAGE - 015
STORY MAPPING FRAMEWORK

Story Mapping – The Process

Step 1: Set the Vision

As mentioned, there are three ultimate outputs to our story map: the high-level vision of the value that will be delivered (the *why* and the *who*); the actual business goal, integration, and implementation strategy of the idea (the *what*); and the responsible management over time (the *how* we will achieve the vision).

So, if we start with an idea, one of the first things we'll do is determine whether it's a good idea, and whether it's truly valuable to the audience we're trying to reach at that stage in their journey with the brand. To put it into different terms: What we're trying to figure out here is the best *story*, and then determine whether that story is best told as a campfire story, a novel, a television show, a movie, or a series of movies.

Start with Why

Why is at the heart of the story we are trying to tell. It can help us uncover a great idea or expose a mediocre one. But how do we transform what might be a good idea into something that is uniquely valuable to our audience?

One really great method to getting to this overarching story—or core value—is to go through an exercise called the "5 Whys."

The 5 Whys is a process developed by Sakichi Toyoda. It was originally used within Toyota Motors during the evolution of its (now) famous Toyota Production System. It has since been borrowed to be part of the Lean Startup and Agile methodologies. The process is simple: you state a problem, and then probe the "why" question five times (or thereabouts) until you get to the "root cause" of the problem. For each "why" asked, basically the answer is repeated as the question. Here's an example.

Problem: The living room is dark. We can't see.

The 5 Whys:

1. Why is it dark? Because the light bulbs are not working.
2. Why are they not working? Because the light bulbs are dead and burned out.
3. Why are they dead and burned out? Because the light bulbs are old and should have been replaced.
4. Why have they not been replaced? Because we didn't know they needed to be replaced.
5. Why did we not know they needed to be replaced (root cause)? Because we don't have a way to track how old the light bulbs are.

In this case, the root cause is NOT that the light bulbs are not working. That's simply a symptom. The core issue is that we don't have a method to track the age of the light bulbs. Therefore, we can't predict when they will go out, or fix the greater problem, which is a dark room. Unless we get to the core, we will have to fix this problem again. So, fix the root cause and you can more effectively avoid the eventual problem in the future.

There are extensions to the 5 Whys. And, certainly its weaknesses are well documented. But from the perspective of getting to the core aspect of our story from a base idea, asking "why" five (or more) times can be very beneficial.

For example, here are the ideas that most people come up with when asked to create an idea that will work as a content-driven experience initiative:

- Launch a blog that informs users on how to use the kind of product we sell.
- Create a white paper series on the business benefits of the kind of service we provide.
- Use a blog platform to curate news from our industry to position ourselves as thought leaders.
- Create a branded content video that shows a funny actor doing silly things with our product.

All of these *might be* innovative ideas to create a powerful customer experience. But let's take one of these, the "curate news" idea, as an example and run it through our "whys" to get to the true purpose of that idea and how (if at all) it fits into our larger story. *(Note: this example is purposely generic to make the point. We're confident that you and your team will be much more creative here.)*

Idea: Use a blog platform to curate news from our industry to position us as thought leaders.

Target Audience Persona: Our busy CIO customer.

The 5 Whys:

1. Why is curating news to position us as thought leaders important to the CIO?

   Because our CIO customer will see that we have our fingers on the pulse of our business and have a point-of-view on the industry.

2. Why is it important that our CIO customer see that we have our fingers on the pulse and have a point-of-view on the industry?

   Because then our CIO customer will have more trust in what we say.

3. Why is it important to our CIO customer to have more trust in what we say?

   Because developments in our industry are changing quickly. Our customers need a trusted partner to keep them on top of what's going on.

4. Why does our CIO customer need a trusted partner to keep them on top of what's going on in our industry?

   Because they are busy trying to be successful, and a trusted partner can help them be informed.

5. Why is it important for our CIO customer's success to be informed?

   Because if they're informed about the industry from a trusted source, they will be more competitive—and can then be more successful.

Interesting. Within five "whys" we go from a blog that's focused on "positioning us as thought leaders" to a blog platform that "*helps our customers be more competitive and successful.*" That's value to THEM. Now, here's the intriguing part. You can go back and read those "whys" in reverse; with a little massaging and wordsmithing, you'll have a pretty well-formed vision (or content mission) for your story.

Now let's look at our example and run it backwards. (Yes, we've massaged this a little.)

Our Mission:
CIOs are busy, and more than ever they need a trusted advisor that will help them be more competitive and successful in their career. They need to be kept up to date with a fast-changing industry, and the evolving trends in the business. Our new content curation news platform strengthens the trust our customer has in us. Our goal is to help our CIO customer think of OUR BRAND as the knowledgeable advisor that keeps his/her finger on the pulse of the industry.

See how it started with "why" (our core value) and worked backward to get to our original idea?

If you wanted to dig deeper, you could continue to ask more questions. For example, *"Why is it important that our customers are more competitive?"* Each "why" takes a bigger and more important leap toward understanding the larger context of the customer's world.

This is an important point. You'll notice that in the questioning, we immediately put the emphasis on *"why"* this is important to the audience. Creating value for them is the central point here. It's not about us creating value for us.

Now, not every idea is gold. In many instances you'll find that the "whys" lead to something that's not terribly interesting, so you can safely abandon the idea. But it's the

process that's important. Just like with a child, developing the "whys" helps the inquisitive mind learn how to solve problems in a creative way. And, **most importantly, it encourages the entrepreneurial idea of the joy of discove**ry. **This becomes central to breeding a culture of innovation.**

Additionally, we can start to take these "core values" and determine if they can be expressed uniquely, or differentiated, for our brand. They become testable product ideas that can be researched.

As the wonderful quote from Proust says, *"The real voyage of discovery consists not in seeking new lands, but seeing with new eyes."* Asking *"why"* can certainly open them wider.

Okay, so we have the "*why*" and the *"who"* for this particular vision, and we can look to see if our new idea is differentiated and aligned with our overall brand promise. Now we need to develop the "*what.*"

Step 2: Set the Objective for the Vision

As part of the framing of our new experience, we need to provide the reason why this "something" should be executed. So, the next step is to construct a definition of "what" we will create. To begin, we should start asking ourselves some important questions to assess the business value of the idea.

- **What business goal can we meet by creating this value?** What are we trying to accomplish with this? Don't confuse this with the success of the platform. The goal should be stated as a measurable business achievement (as outlined in Chapter 10). For example, drive X% more leads in X time. Or create X% uplift in brand awareness. Or, create X% more value to the shopping cart.

- **What does success look like?** When we launch a new product, we don't expect it to hit sales goals two days after launch. Why do we expect the same of our content experiences? True success is almost never measured by when we launch an initiative, or even after we've had it "live" for some time. Success is achieved when we've reached—or can with a high degree of confidence predict—that a minimally acceptable goal has been achieved and sustained. Platform success may ultimately support more than one business goal—but only AFTER the platform has become successful.

  So, "minimally" is an important concept there. Too often, we set business goals based on what we "hope" the platform can achieve, or without knowledge that even a big success will be woefully inefficient to affecting the business. So, we start the map by projecting the minimally acceptable goal for success of the platform itself and THEN draw a picture of what success looks like when we meet this goal.

- **How good are we at delivering this value?** In many cases, we are just building onto a brand promise that we are already making through other channels. So, in this case, it's just about executing in a more focused and compelling way. However, it could also be that we are trying to remediate some brand damage (e.g., think of a PR crisis management situation). Or, our brand doesn't have the "permission" to be extended to that value. For example, with all due respect, The Olive Garden restaurant is unlikely to be trusted as a tastemaker for fine Italian wines no matter what new content they put out. But could they use content to position themselves as a teacher of Italian wines more broadly? Well, maybe they can but it would fundamentally shift *the purpose of*

content they would launch with. If we were the content marketers at The Olive Garden, we'd most likely need to change a lot of beliefs FIRST.

We need to honestly assess our ability to deliver the value of the core story in order to estimate how long it's going to take us to get there—or whether it can ever get us there. This will primarily affect the balance of our purpose-driven content mix.

- **How can we differentiate and deliver a different experience?** This is really where the channel discussion should happen. Just because there already *is* a blog on the topic we want to cover doesn't mean that we can't launch a new topical blog. But, how will our approach be different? What can, or should, we add? Can we also differentiate on HOW we deliver the story?

- **How can this story become cross-channel and cross-functional?** In other words, ask yourself how this idea will not only work across a blog or the sales function, but also across brand, public relations, social media and other functions of the business. The best ideas are the ones that span the entire organization.

  One of our favorite tips for this came from a conversation with Jonathan Mildenhall, former VP of worldwide creative and advertising for Coca-Cola. Mildenhall had a mandate that any team pitching to him must first consider how the idea would be cross-functional. As a result, many teams obtained buy-in from the cross-functional team leads early on, and already had input on where the ideas could—or should—be executed. This is a great example of "inspiring the revolution" that we discussed in Chapter 6.

Of course, you may think of additional questions that will help you draw a crisp and powerful argument for the business reasons behind an initiative. But, theoretically, you now have the insight to fill out the first two pieces of the story map.

Our next step is to look at "how" the map will be planned and executed.

Step 3: Set the Map to Realize the Vision

Once the initiative has a vision and a business reason to exist, we must then make it real. As we've discussed, there are important differences in the way that marketing groups construct plans for campaigns vs. a content marketing approach.

In a traditional marketing or advertising campaign, we want to understand the campaign goals and tracking, the target audience, the key campaign messages, the offers, the media strategies, and the schedule and campaign integration. Many of these are similar to the construction of a content marketing approach.

But there is one critical—and often overlooked—difference. This experience really has no end. It's not a campaign. It's a content product.

In this regard, the mapping, building, and ultimate management of the content-driven experience looks much more like product development than it does a traditional marketing campaign.

We've examined in the previous step how to frame this initiative for addition to the business's portfolio. We've defined an idea, created a core proposed value for the

audience, and created a business goal and a timeframe to reach both. These will now form the basis for creating the map for how to execute the initiative.

The mapping step is vital in executing an effectively managed content marketing initiative. It should be managed differently than a traditional marketing campaign, because we will need to create measurement strategies that enable us to launch it, modify it, manage it, and then sustain or decommission through the lens of permanence. The first operational difference is to change the order in which the planning will take place. Normally, when creating a marketing campaign or project, the first thing we do is discuss the milestones in the following order:

The Traditional Marketing Campaign Process

How long will this take to create/build?
(e.g., project plan, creative, technology, deployment)

Once we launch the effort, what will it take to manage it?
(e.g., what are the channels, content, technology, analytics, media)

What are our goals after the launch?
(Month one, two, three, etc., and then by the end of the campaign)

In fact, almost all digital projects done in concert with agencies are handled in exactly this way. The implemented methodologies are almost always some form of the following:

- Develop requirements for the project
- Design and implement based on those requirements
- Launch (or delay) based on the fulfillment of those requirements
- Manage and add in "phased aspects"
- Measure, learn, and reiterate, or begin again.

Thus, the way most marketing project-campaign plans are assembled and executed is based on a "best-case" scenario with go/no-go decisions based on how far along (or behind) the pre-prescribed timeline of the project is.

No doubt, many successful marketing campaigns and projects have been delivered this way. We are not suggesting that every marketing project methodology needs to be upended and changed into what Agile, the Lean Startup, or other methodologies would prescribe.

However, one of the key differences from traditional marketing campaigns is that content marketing initiatives are infused into the other communications efforts. In most cases, they need to be:

- Promoted and marketed
- Cross-functional
- Cross-channel
- Centered on fast adaptation.

Some of the biggest complaints about content marketing initiatives derive from common myths:

- They can't be measured or assessed until they've been live for a year (not true).
- We can't tie content-driven experiences to successful measurement for the business (not true).
- We're not structured to enable a company-wide content marketing or customer experience mission (not true, even if silos exist).

In contrast to our description of traditional and familiar methodological initiatives, here is an alternative approach to mapping a content marketing initiative.

Starting with "X" Marks the Spot: Backward Mapping
Borrowing somewhat from the interesting work of Rita Gunther McGrath Ian C. MacMillan, which is presented in their book, *Discovery-Driven Growth: A Breakthrough Process to Reduce Risk and Seize Opportunity*, we begin the story mapping step by starting at the end.

McGrath and MacMillan suggest starting a product development process by creating what they call a "reverse income statement," which allows you to:

> *"…model how all the various assumptions in the initiative affect one another and whether, as you gain new information, the plan is getting traction or is at risk. The documents are intended to change as you learn, not to be a finished product."*

Story mapping takes the reverse income statement idea and synthesizes it, using ideas from the concept of "backward design," and transforms it into an idea we call "backward mapping." What this means is that we start with our "X" that marks the spot, and then work backward.

Contextualizing "X"
Using the goal and the timeline we've established, we have an endpoint and know what a minimally viable success looks like at a relative point in time. What we don't know yet is how the timeline looks in context with what we must do to reach the endpoint.

To get there, we have to look at that point in time and, then, to make assumptions and draw conclusions about what needs to be true to achieve the vision, we set in the first step.

For example, let's use the case of the B2B technology services company that we used earlier. In this example, the company rejected the "curated news" idea and decided to create an original content platform that targeted new, young, and ambitious CIOs (a core audience persona for them). Let's map out their story. Let's start with a recap of what we've learned so far and review their vision.

The Vision

The "Why"

The Core Story (Our Content Mission)

a. **Who is the audience for this story**?
Young, ambitious CIOs who are looking to further their careers by keeping up with trends in IT.

b. **What is the content mission (or core story)?**
We can be the new voice of the CIO. Our MissionCriticalByDesign.com online magazine helps CIOs navigate the fast-changing technology landscape. We help them stay current by reporting on the most important future trends in data center management and how they can navigate their career. Through original and curated content, we will be different than any other technology magazine out there in order to help the young CIO navigate a successful career.

c. **What is the narrative timeline for this story until success?**
We have no base for this because this is a new audience for us. So, we will first need to attract an audience for this platform and focus on audience development as a core strategy. We will first try to pull them in by leveraging industry influencers as guest writers. Then, to establish our authority, we will source great thought leadership content so essential to our audience that it will create a loyal base. Our narrative will have three parts: Inspire, Engage, and Accelerate. In alignment with our business case, we believe this will take 12 months from go-live to reach success.

The "What

The Business Case

a. What is the business goal?
We achieve success when we are drawing 25% more monthly qualified leads from this new target persona. Additionally, 1,000 new engaged CIOs from our target company list will become aware of our brand and subscribe to our platform.

b. **How will we differentiate our approach?**
Our research has shown that no one is currently publishing a career-oriented magazine for young, ambitious CIOs who are trying to focus on mission-critical businesses. Our ability to connect these CIOs, as well as provide thought leadership on big data and data portability, gives us a unique advantage to deliver this value. We will also differentiate by making our online magazine available over mobile and social platforms.

c. **How will we integrate this into our existing marketing or cross-functional efforts?**
A key effort here, as part of our Inspire, Engage, Accelerate program, will be to introduce and promote this initiative through our existing direct marketing program, as well as through our onboarding program with new clients. We will work closely with our PR team to generate news that makes influencers and other industry luminaries aware of our new platform. Ultimately, this will integrate with the demand generation team to provide more qualified leads.

This map is very truncated, but it should give you an idea of where we would be when we start the actual mapping process. There's a very real business goal in this initiative. There's a narrative story present as well, because our example company realizes that their character (the brand) isn't known for this yet. They must first inspire, then engage this new audience, and finally create something scalable.

So, we begin the mapping process by defining what success looks like. Building on this definition, we make some assumptions and draw conclusions about what must be true. Thus, in the above example, we define success as:

- *Success:* when we have 25% more qualified leads and 1,000 new CIOs subscribed to our platform (e.g., brand awareness in our new target market).

With success clearly in sight, we work backward (in whatever granularity makes sense) to look at two things:

- What needs to be true at each stage (Inspire, Engage, and Accelerate)
- What assumptions we will need to make (a list of our best guesses using our experience and previous knowledge) about the best way to get to each truth.

Working from "X" backward, we split these into three discrete groups:

- Our business goals
- Our editorial mix of purpose-driven content
- Our integration mix into other areas of the business.

There may be others you might want to capture, and certainly this model can be expanded. The point is to capture, in categories, what the team needs to feel comfortable about moving forward.

If we designed a matrix defining the specific categories for our example, it would look like this (remember, we're working backward):

Accelerate **Days 365 Forward**		
Business Goals	**Editorial Mix**	**Integration Mix**
• 25% more qualified leads in the pipeline • 1,000 subscribers • 2,000 visitors to the platform	• 80% professor content • 10% poet content • 10% preacher and promoter content	• Core element of demand generation • Working with customer onboarding to expand into loyalty • Working with PR to attract new influencers to the platform
Engage II **Days 270-365**		
Business Goals	**Editorial Mix**	**Integration Mix**
• 1,000 visitors • 500 subscribers • 10% more qualified leads • User survey indicating strong CIO presence as subscribers	• 60% professor to feed existing subscribers • 40% percent promoter or preacher to continue promotion and audience acquisition	• Heavy integration with Social and PR for promotion • Promotion through email and client events • Standard part of client services onboarding program
Engage I **Days 180-270**		
Business Goals	**Editorial Mix**	**Integration Mix**
• 500 visitors • 200 subscribers • Some new qualified leads • Audience survey indicating valuable platform	• 40% professor to feed clients • 60% promoter and preacher to promote program	• Heavy integration with PR and Social for promotional and influencer effort • Paid media opportunities to focus on audience acquisition • Email and web team key to making sure we are promoting new platform
Inspire **0-180 Days**		
Business Goals	**Editorial Mix**	**Integration Mix**
• 500 total visitors • Three new influencer posts	• 80% percent promoter and preacher content • 10% professor content	• Full integration with PR and social as blog launch and integration with advertising team for paid media opportunities

		• Integration with event and other marketing services

As you can see, our content mix changes markedly as we move through the different phases. We start out with a ton of promotional content as we focus on audience development. This obviously affects our editorial strategy as well as our ability to generate leads. Then, as we reach success, we can dial down the promotional content while we accelerate the reasons that our audience should return and engage with our content.

Remember these are percentages, not quantities. So our content load at the beginning will be VERY high as we fill the blog AND the promotional channels. This helps us identify where the costs and budgets should be placed.

With this in mind, we can clearly communicate and inspire our teams and our C-suite, and propose a reasonable budget, timeline, and measurable strategy that will move our business forward.

If we've carefully planned our map, we should be well on our way to success. Because this is a process, we can anticipate that new tests and challenges will get in our way. So, we must also be prepared to make iterative changes along the way, based on both successes and failures.

Starting the Journey

Actually deploying the initiative is really the meat of our narrative. If we set up the story well, success may simply flow from executing exactly as planned. Or, as is most often the case, it may mean improvising based on a sudden unplanned challenge or obstacle.

One of the keys here is to get into a review cycle—not based on major development milestones—but rather as a function of progress toward the different phases of the story as you have mapped it. The level of granularity of these rhythmic review cycles will depend largely on how confident you are about your assumptions, your learning along the way and, of course, the size of your investment in the initiative.

This process differs from campaign or classic marketing project planning because there are no "preconceived" stages that measure the project. Rather, we treat this as an approach, moving it forward based on our learning rather than on predetermined notions of success.

Checkpoints on this learning are the direct result of the goals we set in the vision or as other unpredictable changes arise.

At each checkpoint, we must ask very specific questions as a group and have ongoing discussions about continuing "as-is," with "modification to the plan," or by accelerating or decelerating the plan.

Questions to Ask

- What was the outcome we were hoping for?
- What was the reality we got?
- What did we learn from the gap, or the surplus?
- What do we need to change from our original assumptions?
- What do we need to change to meet the next business goal?

Using the measurement philosophy we describe in Chapter 10, you can start to look at your goals, your primary indicators, and your user indicators to get a good sense of how to report progress to others.

Don't Wait for Big Experiments; Prototype Early and Often

When creating the map, try to identify the "show stoppers" and those that can easily be tested. In other words, as we make assumptions, we will be making some of them with a high degree of confidence about their accuracy. Other assumptions, however, will be pure guesswork. Still others will be guesses that could be tested in advance.

For example, let's suppose one of the assumptions was that we could actually attract these new CIOs through a paid campaign to a number of existing CIO resources. This is something that could be tested and included as part of the story map. This might be especially important if instead of 1,000 subscribers, we were looking to address *10,000* subscribers. That paid campaign might be the biggest cost of our new initiative. Knowing how effective a paid campaign would be will be critical in understanding the timeline of the success of the initiative. We should plan for taking lots of little steps as we build toward a larger approach.

Remember, we are building toward the minimal acceptance of success. Even if we "blow it out of the water" initially, there may be unexpected challenges ahead. We still need to have review checks to see if our assumptions will be affected.

As we've mentioned, there are other, more detailed models for developing methodologies to deliver everything from small projects to enormous products. We've made no secret that our story mapping process borrows from a number of them. The key is to actually adopt one and scale it. Develop your own toolkit for the management of the content and your owned-media platforms. Once you have an actual process—a method by which to govern your actions—you will have the freedom to be more creative, more "outside the box," and more agile.

We don't know what's coming. All we know is that things will change. And if we structure ourselves to accommodate change, we will succeed in the long run.

What's Next: The 90-Day Vision

Story mapping can be a very valuable process—if not for project planning, for building a business case for a new initiative. But, the difference is that a story map is the plan (or business case) for a new "product," not a campaign.

- The First Month
  Work with the CCM team to develop parts one and two of the story map.
  - **Define the content experience mission.** What is the valuable experience that is separate from your product or service? To whom will you deliver this value? Is it a differentiated experience? If not, how will you differentiate?

  - **Define the business goals.** Work toward one or multiple business goals that could be achieved by delivering this differentiated approach to this customer. What goals might it achieve in the first phase vs. how it might evolve over months or even years? What does success look like (separate from your business goals) and how long will it take to achieve? How will this success (or can it) be integrated into other parts of the customer's journey or your organization?

- The Second Month
  Work with the CCM team to prioritize and outline the actual story map.
  - What does the narrative outline look like? Do you need to start with one type of content (such as poet content) to change beliefs before you start educating? Or, do you need to create awareness first, and then start bonding emotionally? What does the storyline look like over time? How does that comport with your business goals?

  - Are the business goals aligned with the level of effort needed to implement and integrate this initiative? What does this look like in the short term and over the long term?

  - How will this story express itself through channels over time? How does this affect the purpose-driven content strategy?

- The Third Month and Onward
  Create the implementation and integration plan and begin to manage the platform.

  - Once budgets and the project are approved, work with the CCM to assign resources for the "product development" of the initiative. How will the roll-out, plus the ongoing management, affect resources from marketing, subject matter experts, content sources, technology, etc.?

  - Map the rollout and execute not based on major development milestones, but rather as a function of progress toward the different phases of the story as you have mapped it.

  - Conduct frequent iterative reviews to establish whether "truths" have been reached and if changes are necessary in order to make future assumptions true.

A SPECIAL OFFER

If you've gotten this far, perhaps you'd like to go a bit further.

Let us know if you'd like us to come in and do an advisory or education for your team or your executives. Let's convince them of the change, and rebuild the business case together.

Contact:
By Email: info@thecontentadvisory.net
Web Form (if you like those better): http://thecontentadvisory.net/contact-us/
Phone: 323-230-0243