

CONTENT STRATEGY TEMPLATE

Content Strategy Template Workbook

Presented by [Your Name] · [Date]



How to Use This Workbook

A fillable template with guided prompts to build your complete content strategy

Step 1: Complete Each Slide

Work through each slide in order, filling in the prompts and placeholder fields with your project's specific information.

Step 2: Use Tips & Examples

Refer to the tips and example placeholders on each slide for clarity and guidance as you develop your content strategy.

Step 3: Save As You Go

Save your inputs regularly. This workbook is designed to be revisited and refined as your strategy evolves over time.

Phase 1: Operational Framework

Project Alignment & Governance

Begin by defining your project's foundation and governance structure.

Project Metadata & Overview

Fill in the fields to define your project foundation

Project Name

[Enter your project name here]

Project Description

[Briefly describe your project—its scope, purpose, and intended audience]. Align with your product owner.

Launch Window / Timeline

[Enter start date, end date, and key milestones — e.g., "Q3 2025 – Q1 2026"]

RACI & Team Roles

Identify who is Responsible, Accountable, Consulted, and Informed for each content task.

Product Owner

Accountable for the overall project direction and final decisions. Product Owner: [Name]

Content Lead(s)

Responsible for content planning, creation, and quality. Content Lead(s): [Name(s)]

Designers & Stakeholders

Consulted and Informed throughout the process. Designers & Writers: [Name(s)] — Stakeholders: [Name(s)]

Project Goals & Objectives

Define your strategic goals and measurable objectives to guide your content strategy.

Business Goals

List 2-3 strategic goals:

[Goal 1: e.g., Increase brand awareness by 20%]

[Goal 2: e.g., Drive product adoption]

[Goal 3: e.g., Reduce support inquiries]

User Goals

List 2-3 user-centered goals:

[Goal 1: e.g., Find clear product information quickly]

[Goal 2: e.g., Feel confident in purchasing decisions]

[Goal 3: e.g., Access helpful support resources]

Success Metrics

Define measurable (S.M.A.R.T) KPIs:

[KPI 1: e.g., Organic traffic growth]

[KPI 2: e.g., Conversion rate]

Tip: Use SMART criteria — Specific, Measurable, Achievable, Relevant, Time-bound.

Brand Tone & User Flow Alignment

Brand Tone Scale

Select your position on the scale below to define your brand's communication style.

Technical ←———— Neutral —————→ Plain Language
[Mark your choice here]

User Flow Scale

Select your position on the scale below to define how guided your user experience should be.

Exploratory ←———— Balanced —————→ Guided
[Mark your choice here]

Alignment Instruction

Use these scales to align stakeholder expectations early in the project. Document your selections and share with the full team to ensure consistent tone and experience design.

Tip

Early consensus on tone and flow reduces late-stage revisions and misalignment between content, design, and strategy teams.

Phase 2: User & Market Landscape

Research & Context Mining—Gather and organize user insights, competitor data, and ecosystem audits.

User Research Summary

Capture key insights about your target users to inform your content strategy.

Target Audience Personas

Describe your key user segments and their characteristics.
[Describe key segments — e.g., "Busy professionals aged 30–45 seeking quick, trustworthy answers."]

User Pain Points

List the main challenges and frustrations your users face.
[List main challenges — e.g., "Users struggle to find clear product information on our website."]

User Needs & Preferences

Outline the top needs, goals, and content preferences of your audience.
[Outline top preferences — e.g., "Users prefer concise, visual content accessible on mobile devices."]
Tip: Base this on qualitative & quantitative research where possible.

Content Journey Mapping

Guide content tone and messaging based on how users feel at each stage of the marketing funnel.

Awareness — Educate

User feels: [Unaware, curious, overwhelmed]

Content tone: [Approachable, clear, jargon-free]

Content goal: [Build trust and introduce value]

Consideration — Evaluate

User feels: [Interested but cautious, comparing options]

Content tone: [Confident, specific, evidence-based]

Content goal: [Reduce doubt and support comparison]

Conversion & Loyalty — Act & Return

User feels: [Ready to commit, or seeking reassurance post-action]

Content tone: [Direct, celebratory, supportive]

Content goal: [Drive action and nurture ongoing relationship]

Competitive Content Audit

Use this matrix to compare competitors and identify differentiation opportunities.

Value Proposition

Competitor A: [Brief summary]

Competitor B: [Brief summary]

Our Brand: [Brief summary]

Content Strengths

Competitor A: [List key strengths]

Competitor B: [List key strengths]

Our Brand: [List key strengths]

Gaps & Opportunities

Competitor A: [Identify gaps]

Competitor B: [Identify gaps]

Our Brand: [Areas to improve & differentiate]

Internal Content Audit

Existing Content Overlaps

List areas where content is duplicated or redundant across channels, pages, or formats.

[Enter overlapping content areas here]

Content Ownership

Identify who owns each content asset or category within your organization.

[Assign owners per content type or section]

Analytics Overview

Summarize key performance metrics for existing content such as pageviews, time on page, and conversions.

[Enter key metrics here]

Action Plan

Decide what to do with each content asset: Keep, Update, Delete, or Consolidate to streamline your ecosystem.

[Map each asset to an action]

Phase 3: Definition & Standards

Governance & Editorial Quality — Define your strategic content statement and quality standards.

Content Strategy Statement

Use the guided formula below to craft your core content strategy statement

The Formula

"The content we produce helps [Company Goal A] and [Company Goal B] by providing [Adjective] and [Adjective] content that makes [Audience Persona] feel [Emotion] and [Emotion] so that they can take action to [User Task A] and [User Task B]."

Your Statement

The content we produce helps _____ and _____ by providing _____ and _____ content that makes _____ feel _____ and _____ so that they can _____ and _____.

Example

"The content we produce helps increase product adoption and brand trust by providing clear and engaging content that makes tech professionals feel confident and informed so that they can make purchasing decisions and advocate for our solutions."

Content Quality Scorecard

Rate each criterion to assess
readiness before production

Business Goals & User Needs

Business Goals: Are they clear and measurable? Rate 1–5: []

User Needs Addressed: Does content solve real user
problems? Rate 1–5: []

Solution & Audience

Solution Intuitiveness: Is the content easy to navigate and act
on? Rate 1–5: []

Audience Definition: Is the target audience clearly defined?
Rate 1–5: []

KPIs & Overall Readiness

KPIs Identified: Are success metrics defined and trackable?
Rate 1–5: []

Overall Score: [] / 25 — Use as a go/no-go gate before
content production begins.

Thank You

For using the Content Strategy Template Workbook

Next Steps

Review and finalize your strategic inputs across all three phases of this workbook. Move forward by converting these insights into layout design, team alignment, and measurable interface elements.

Shape the Content Hierarchy & Layout

- Prioritize Above the Fold: Use the User Pain Points and Journey Mapping from Phase 2 to determine what critical information must hit the user immediately.
- Inspire the Visual Design: Partner with your design team to map out the required layout real estate. The complexity and priority of your content should dictate the wireframe structure, ensuring the UI supports the narrative flow rather than squeezing copy into pre-made boxes.

Lock In Stakeholder Buy-In & Alignment

- The Pre-Writing Gate: Schedule dedicated alignment workshops to validate this strategy with product owners and cross-functional stakeholders.
- Eliminate Late-Stage Revisions: Secure explicit sign-off on the business goals, user needs, and tone parameters before moving into production. Agreeing on the strategy now prevents subjective, distracting feedback during later copy reviews.

Connect Content Components to ROI

Design for Action: Translate your strategic goals into specific interface components. For example, if the primary objective is account creation, design prominent, persistent elements—such as a sticky "Open an account" CTA.

Track Performance: Ensure every major content element maps directly back to your success metrics (e.g., tracking user clicks or account opening conversion rates) to continuously prove content value.

Validate Early via Low-Fidelity User Testing

Test the Structure, Not the Polish: When feasible, run low-key user testing before heading into actual writing. Use methods such as card sorting, tree testing, or simple content comprehension exercises to discover what is truly important to the user and to validate your proposed information architecture.

De-Risk the Layout: Testing early ensures that your content hierarchy and design layout make sense to actual humans while the cost of making changes is still practically zero.

The Living Source of Truth

Treat this completed workbook as your project's North Star. If product alignment wavers or scope creep happens during production, bring teams back to this document. It serves as the official, agreed-upon framework demonstrating exactly how your design decisions meet business requirements and address documented user needs.