

# **DIGITAL GOVERNANCE:** A PRIMER FOR CONTENT MARKETERS

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WHO SHOULD DECIDE WHAT, WHEN, HOW, AND WHY

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## ○ Introduction

Do you ever feel confused about which members of your digital-content team should make what decisions and when? Do you even know who all the team members are and what they do? Do you sometimes smell ROT (information that's redundant, outdated, or trivial) and wish that your organization had a better process for maintaining its old content so that customers were more likely to discover only content that's relevant, up-to-date, and useful?

If so, you're yearning for digital governance.

To help content marketers deal with governance, we've gathered some guidance from Lisa Welchman, author of *Managing Chaos: Digital Governance by Design* and president of digital governance solutions at ActiveStandards. This primer covers the following topics:

- **Digital governance defined**
- **Getting started with digital governance**
- **A four-step process for developing a digital-governance framework**
- **Creating your framework document**

## Digital governance defined

Digital governance is a discipline that focuses on establishing clear accountability for digital strategy, policy, and standards. The phrase “digital governance by design” conveys that a governance framework must be effectively designed if it’s going to work. Over the last couple of decades, the organizational use of websites, mobile applications, and social media channels has grown organically – and so have the digital teams that support them. After 20 years of organic growth, it’s important to take a step back and intentionally design how digital operates so that it can scale effectively in the decades to come.

Most digital-governance challenges come from not knowing who’s supposed to decide things. We’re not talking about micromanaging. We’re talking about supporting people in doing their jobs.

For example, if you need to establish a standard for your online color palette or content strategy, it’s not a community decision. It’s a conversation among informed internal resources and then the decision is made by an identified decision-maker. That sort of process scales effectively and speeds up time to web because your digital team isn’t locked in constant debate about who gets to decide digital standards.

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## **Digital governance yields effective collaboration.**

The concept of “governance” often gets a bad rap because people assume that if you try to govern something then you will also stifle creativity. But, that’s not true. There are lots of creative collaboration models from which digital teams can learn.

A small digital team, like a small jazz ensemble, can get away with improvising – making things up as it goes along, with some basic guidance from a musical lead sheet. A large team, on the other hand, needs to operate more like a symphony orchestra – with clear leadership and a detailed musical score to follow. **Large digital teams that try to continue to improvise around digital development will inevitably make a mess online, sounding more like noise than music.**

To be effective, modern digital teams need to follow standards just as an orchestra needs to follow sheet music. Unfortunately, a lot of large digital teams haven’t matured into the standards-based orchestra model.

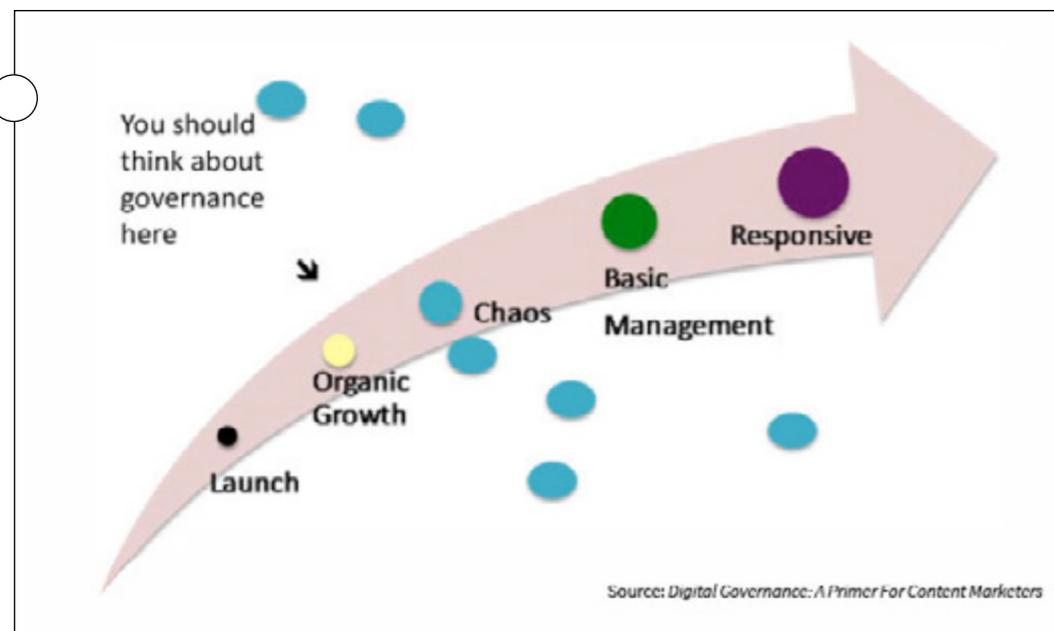
**To be effective, modern digital teams need to follow standards just as an orchestra needs to follow sheet music.**

How do standards help a large group function like an orchestra? **Standards provide the structure needed for people to prepare and deliver content on a large scale while still allowing for creativity and a beautiful outcome.**

## Getting started with digital governance

Governance presupposes that you have a desired outcome in mind and that you have a plan for getting there. You don't need formal governance for every content effort. For example, when you launch a new channel or do something experimental, governance could get in the way. But after you've found out what works and what doesn't work and want to effectively scale your content strategy (or other digital functionality) across the full organization, governance becomes crucial.

**At this crucial point, you should think, Okay, how are we going to put some standards and mechanisms in place to scale our content effort?** This includes a full-life-cycle approach to content creation, which means you should be thinking about the standards for content publication, updates, retirement, archiving, and, to be complete, content destruction.



**This primer focuses on the middle part of this arrow: moving from chaos to basic management.**

Most people don't consider all this when they put content and applications online. They put things online in a haphazard way and often never take them down. Their online presence falls into chaos, as represented by the blue dots in the middle of this arrow.

## A four-step process for creating a digital-governance framework

Lisa Welchman has developed a process for creating a digital-governance framework that can help companies advance from content chaos to basic management of their digital content.

This process has four steps:

1. Organize the whole digital-content team.
2. Identify the strategists.
3. Identify the policy makers.
4. Establish workable standards.

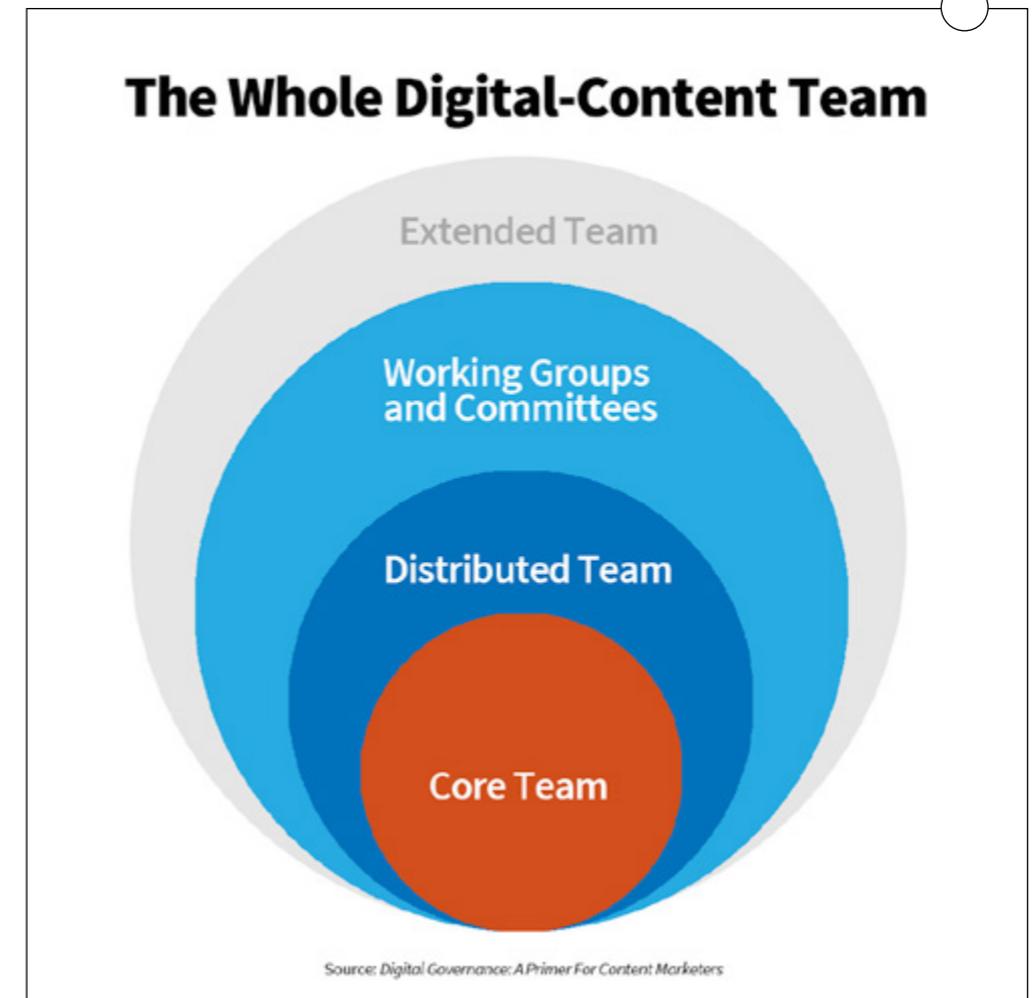
Let's take a detailed look at each of these steps.

## 1 ORGANIZE THE WHOLE DIGITAL-CONTENT TEAM

The first step in designing your governance framework is to find out who's on your digital-content team and get them organized – and it takes some effort. The team may be broader and more dispersed than you expect. For most large organizations, the digital team has factions all over, including in various business units, in “corporate,” and in multiple countries.

The whole team – the full set of resources required to keep your digital presence functioning for your organization – comprises these subteams:

- The core team
- The distributed team
- Working groups and committees
- The extended team



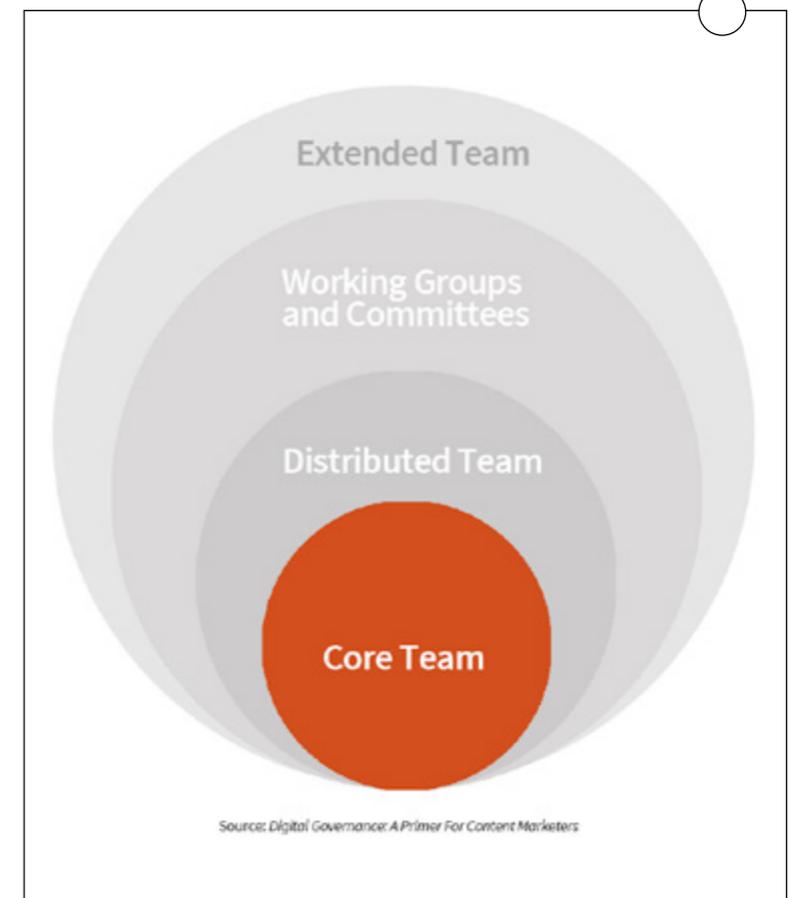
These nested circles show the full set of teams required to keep your digital presence functioning for your organization.

## ● The Core Team

The core team consists of the people who need to understand the full digital beast, especially things that cut across the entire organization. These folks are responsible for the conceptualization and integrity of the full online experience. They do things like this:

- Develop standards
- Shape policy
- Fund and implement the core digital systems like content management systems
- Build effective collaboration among stakeholders
- Measure effectiveness

In organizations where the core team is less than mature, the core team typically focuses on making content and putting it online, spending little time defining and orchestrating standards. Then, when other digital team members put things online that the core team doesn't see as effective, debates transpire. With no clearly established standards, those debates can go on and on, often escalating to more senior managers. The result is often a drawn-out debate that stalls production and may get nowhere.



So, core teams often need some work and some fine-tuning. In their defense, they're overloaded. **They're accountable for the full website, but they have no authority to get anyone else to follow their standards. That's what a digital governance framework will help fix.** It will clarify who has the authority to write standards.

But you shouldn't write those standards without understanding the full needs of your organization. Are you on the core team? Do you help create your organization's standards? If so, here's some advice: Do not make standards in a silo. You may be a domain expert about some things, but you are not when it comes to the business as a whole. **Get input from your internal stakeholders, or people won't follow your standards (or worse, your standards could be ineffective).** If someone told you he or she was doing something that impacted 100% of your job and didn't include you in the decision-making process, what kind of attitude would you have? This is how you create people who want to go against the standards.

So if you're on the core team, remember the importance of collaborating with the other teams. This isn't a power play. It's about working together.

**Do not make standards in a silo.**

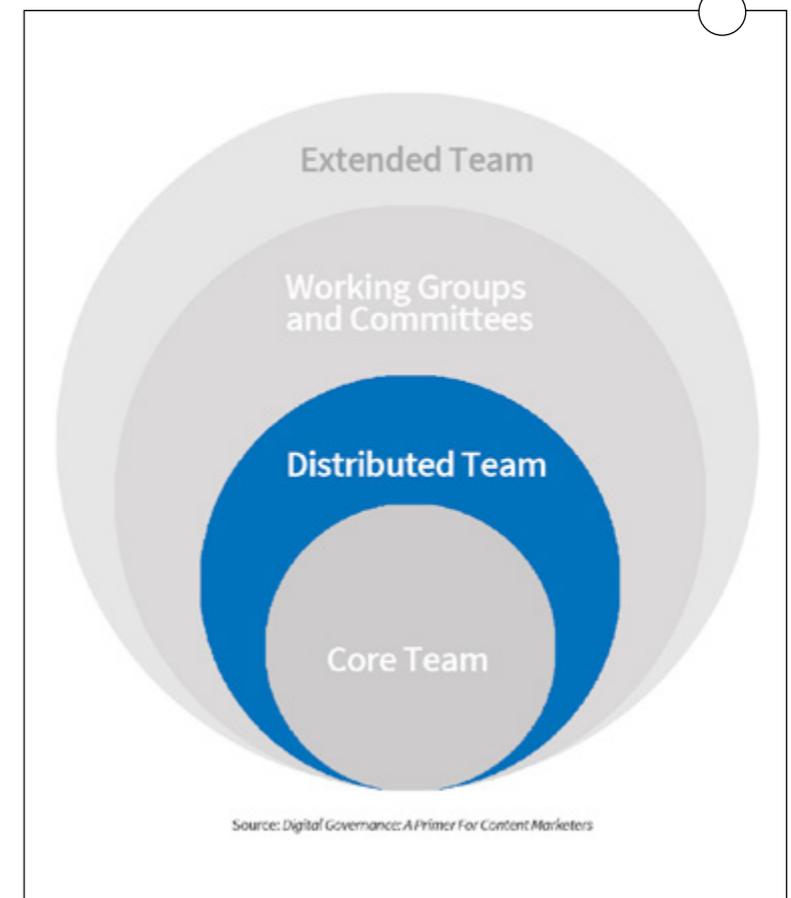
## ● **The Distributed Team**

Members of the distributed team are the people who follow the standards outlined by the core team. These are the makers. They have a job to do that is usually attached to a particular sub-area of your organization. These team members are often responsible for a particular result – for example, increasing online sales of a particular product or getting certain information out to a key audience.

The distributed team does the following:

- **Ensures the quality of particular aspects of the digital presence**
- **Develops and maintains content, applications, or data to support the digital presence**
- **Provides input for the development of digital standards**

The distributed team can contain some real digital domain experts and therefore can often be at odds with the core team when there isn't clear decision-making authority for digital standards. It's important to effectively collaborate and share knowledge with these powerful stakeholders to ensure alignment in digital development.

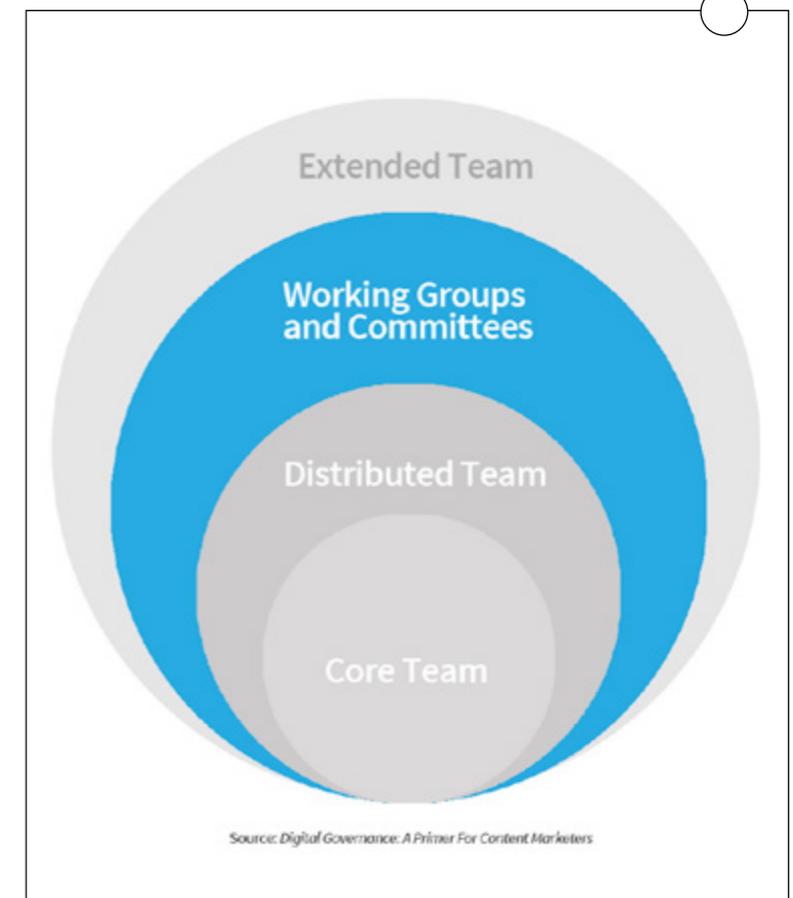


## ● Working Groups and Committees

Certain kinds of working groups and committees can make helpful contributions to the larger team. You can form and break up working groups and committees as needed.

At the lowest level, a working group or committee may be simply a community of practice. It might include the guy who updates the lunch menu on the intranet, or somebody who's making an app in her spare time, or somebody who's writing a treatise that's going to end up on your web server. You probably do not want to stifle this type of behavior because a lot of innovation can stem from these efforts. But you do want to get these people in a group so that you are aware of activities and can ward off the scaling of nonstandard practices where that makes sense. A digital community of practice is also a good forum for educating the broader digital team about best practices and standards.

Working groups and committees at the executive level can also add value. Often, though, teams at this level lack the understanding they need to engage with technical topics;



executives often delegate these decisions. Sometimes this delegation may be appropriate – particularly when it comes to tactical production concerns. On the other hand, it’s always important to have executive input to a digital strategy. The more aware executives are, the more relevant digital strategies will be from a business perspective. At some point, you’re likely to need significant support (such as a head count or other funding). If executives are not dialed in, they won’t “get” it. At this high level, working groups and committees may want to set up special meetings to focus on digital strategy and governance, or they may add digital governance as an agenda item that’s brought up quarterly in an already established meeting.

Finally, you will want to form meat-and-potatoes working groups and committee staffed by your most informed digital and business stakeholders. These teams typically help define standards and choose technologies. Creating this sort of group is one way to get input from business stakeholders so that the decisions will stick. Often these working teams form based on need (for example, a need to establish a new content strategy), and when the work is done, the team disbands. Sometimes, the teams formed are so effective in supporting better collaboration that they continue to meet.

**It’s always important to have executive input to a digital strategy.**

## ● The Extended Team

The extended team consists of people who are not part of the organization. This support can range from vendors that help develop a content strategy to hands-on writers and editors. It can include vendors that help you implement a content management system. In some organizations where a large part of digital development is outsourced, the extended team may be the biggest part of the digital team.

Your whole extended team must understand all relevant policies and standards. The only way to track what content is being made – and how – is through effective communication with the entire extended team, especially if your organization works with a large number of external vendors.



## 2 IDENTIFY THE STRATEGISTS ON YOUR TEAM

After you've got a handle on your whole digital-content team, you need to identify the leaders in the realm of strategy.

Include not only people who can establish the vision (people with a leadership focus) but also people who can enable that vision (people with a digital focus).

Many organizations have a problem in that the people with digital savvy are much more junior than the executives, so there's a big gap. Even when there's a chief digital officer, often that person is not as senior as the other "C" executives, which can often mean that they have less authority and less power when it comes to harnessing budget for their initiatives.



This diagram shows the importance of including both people who can establish vision and people who can enable that vision.



Another dynamic is that content experts are often not business experts, and business experts are not content experts. And, more broadly, sometimes content experts and business experts are also not digital experts. Therefore, collaboration has to take place regarding digital strategy. It's not a matter of who "owns" the digital strategy. The organization owns its online presence, and a number of players need to be at the table to form effective content and digital strategies.

Ideally, as a more digitally native demographic group moves into positions of organizational authority and power, these various areas of knowledge will be less siloed. Tomorrow's executives will then be able to manage and function effectively through all these domains.

### 3 IDENTIFY THE POLICY MAKERS

Okay, you've identified the whole team (Step 1), and you've identified the digital strategists, both the vision makers and the vision enablers (Step 2). What's next in the four-step process of developing your framework? Identifying the policy makers.

**Policy is about managing risk. People usually attend to policy only as much as they have to.**

If you look at the footer on a website, you'll see terms like *privacy*, *terms of use*, and *security*. The larger the organization, the more numerous and complex its policies will be. The list on the right shows some examples.

The online policies that are required may differ across industries and geographic regions. For example, if you're in the pharmaceutical industry, what you can and can't do online varies from country to country.

#### Example Policy Types

Branding
Copyright
Linking
Social Media
Intellectual Property
Language & Localization
Accessibility
Web Records Management
Domain Names
Information Management
Data
Privacy
Security

Source: *Digital Governance: A Primer For Content Marketers*

This list shows a sampling of the types of policy that organizations may need to create to help govern their digital content.

- The same is true for those operating in the financial arena. Every vertical market space has its own set of opportunities and limitations. It's important to understand what those are for your organization.

Often, organizations have some fundamental privacy and security policies that their IT groups have created, and branding policies established by the marketing team. But, in general, many organizations are immature on policy.

In order to develop adequate policies, you need to identify two types of people:

- **The policy steward** (the person who makes sure that the necessary policies are in place). This is often the organizational legal team. This team understands what types of policies are relevant to be addressed by the organization.
- **The policy authors** (the people who write those policies). These are the people who know what the policies should be. They understand how digital works and where the risks and opportunities lie. They work to strike the correct balance so that the organization can appropriately leverage digital channels while protecting the organization from things like brand degradation and litigation.

## 4 ESTABLISH WORKABLE STANDARDS

Lots of people care about – and argue about – this final step in developing the framework. This step is where you determine the nature of your organization’s digital presence. This is where you answer questions like these:

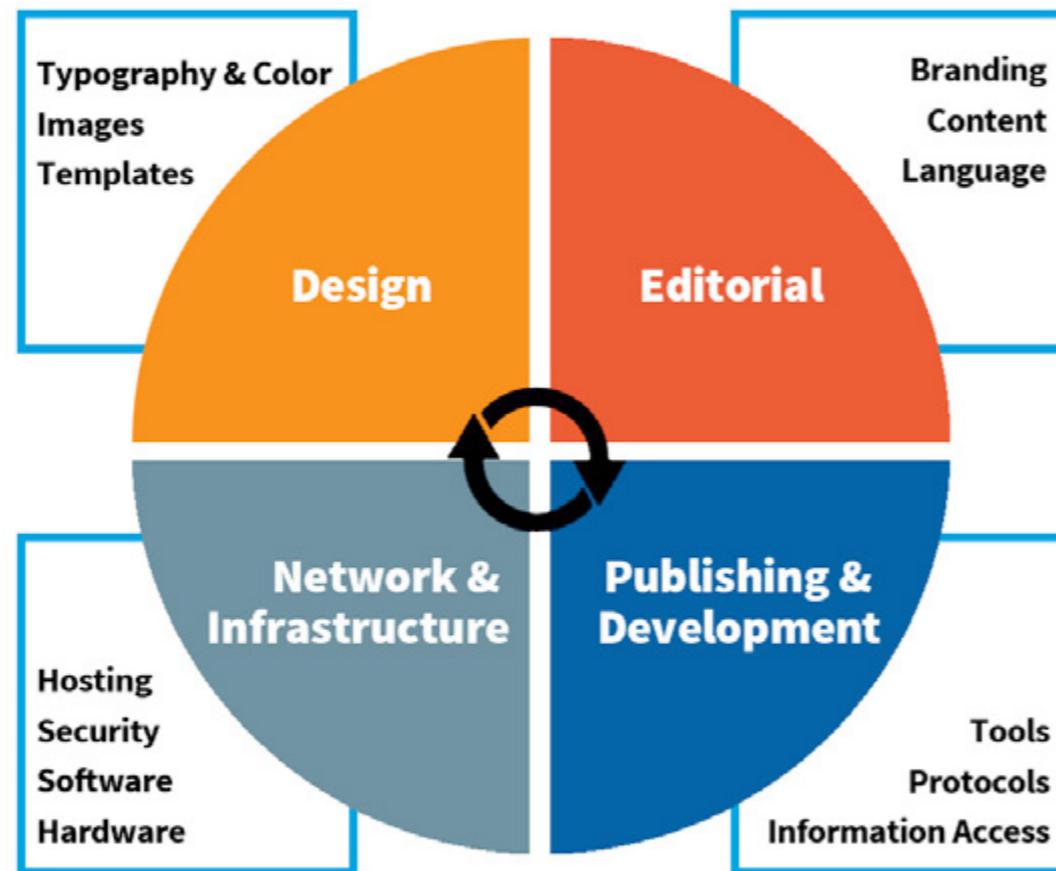
- What exactly are we putting online?
- Who decides how many websites we have and how they are structured?
- What content can we put online and in what format?
- How many web content management systems should we have to support content development and publishing?

The biggest problem core teams have is the lack of compliance with standards, and there are many reasons for this.

- Sometimes the standards bearers don’t have formal authority to implement and enforce standards.
- Sometimes they have the authority, but they have not effectively implemented the standard.
- The standards might be undocumented or not distributed, or the full digital team may not have been trained to uphold the standards.
- The standards may have been written in a corporate silo, so they don’t effectively address all the digital use cases in the organization.

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## Types of Standards



Source: *Digital Governance: A Primer For Content Marketers*

This quad shows four main types of digital-content standards: design, editorial, network and infrastructure, and publishing and development.

Standards fall into four camps:

- Design
- Editorial
- Network and infrastructure
- Publishing and development

### Design and Editorial Standards

Most organizations have covered the top two quadrants: design standards and editorial standards. That's because these standards are often the most visible (what the words say and what the pictures look like). But, even when these standards exist in an organization, sometimes they are not followed for the reasons mentioned above.

## Network-and-Infrastructure Standards

The other kind of standards that organizations may already have relates to the network-and-infrastructure quadrant. IT teams typically create those standards. Because IT resources are used to dealing with privacy and security policy concerns, they often have rigor when it comes to establishing policy and standards, but this rigor can often tightly constrain what the digital team does online. It's important for the IT and content teams to understand each other's perspectives so effective standards can be written that support online development but don't unnecessarily constrain innovation on the digital front.

## Publishing-and-Development Standards

The quadrant that's usually not covered is publishing and development. This quadrant is kind of content and kind of technology. These standards may cover the approach to multichannel delivery, for example. They may cover aligning a content management system with a faceted taxonomy. Sometimes it is not clear who owns these standards, in which case IT, marketing communications, and other business groups can get

It's important for the IT and content teams to understand each other's perspectives so effective standards can be written.

into a tug of war. To exacerbate the challenges, teams might be missing some competencies in this area. It's a rich corner for conversation.

In most cases, these types of standards are developed by the core digital team (when that team has content and technology competencies). Or, if the core team is bifurcated between IT and marketing, real-time collaboration and communication must be established to ensure these standards support content and applications-development requirements from marketers and developers.

To develop adequate standards, as with policies, you need to assign two roles:

- **The standards steward** (the person who makes sure that the necessary standards are in place). This resource makes sure that every standard follows the full standards life cycle. (See “Standards Life Cycle,” below.)
- **The standards authors** (the people who write those standards). These are your digital-domain experts. Content experts write content standards. Technology experts write technology standards – again, with input from digital stakeholders.

## Standards Life Cycle

The outcome of digital governance is a digital team that develops within a standards-based framework. For that to happen, standards need to be taken seriously. It's not enough to write them down and put them in a PDF file on your intranet. To ensure that your standards stick, develop them through a four-phase life cycle:

- 1. Define:** Document the standards.
- 2. Disseminate:** Communicate the standards to the whole digital-content team.
- 3. Implement:** Make sure your full digital team can easily follow the standards by implementing technology for support and by conducting training.
- 4. Measure:** Continuously measure standards compliance so the team knows where to make improvements.

If you've addressed the full life cycle, then standards compliance should be high, and no one will have to enforce the standards through aggressive tactics like taking down content that one of your team members has put a lot of effort into. You want to work toward creating a positive standards-compliant environment. That's a lot more effective than creating a punitive standards-enforcement environment. And a lot more collaborative.

## ○ Creating your framework document

When you've completed all four steps in the process of developing your framework, you may want to collect the information in a spreadsheet that looks something like this.

### Result of Your Digital-Governance Framework

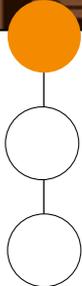
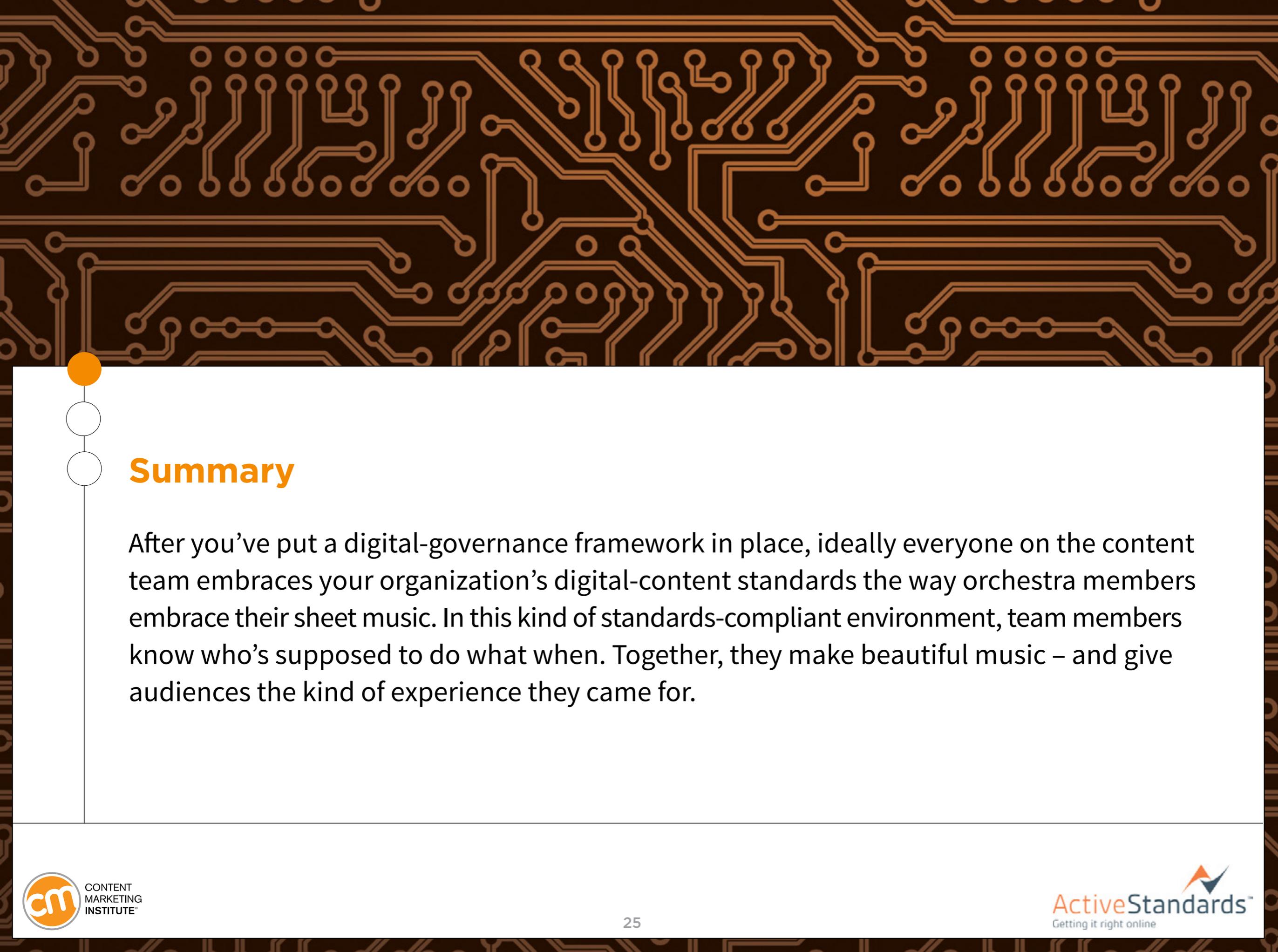
Your Organization Scope: What Are You Governing?	CORE						DISPERSED CORE						DISTRIBUTED			AD HOC	EXTENDED					
Digital Governance Sponsorship & Advocacy																						
<b>Digital Strategy</b>																						
Digital Strategy Definition																						
<b>Digital Policy</b>																						
Digital Stewardship																						
Digital Authoring																						
<b>Digital Standards</b>																						
Standards Stewardship																						
Design Standards Definition																						
Editorial Standards Definition																						
Publishing & Development Standards Definition																						
Network & Infrastructure Standards Definition																						

Source: *Digital Governance: A Primer For Content Marketers*

○ To use this spreadsheet, fill in team members' names across the top and list your strategy, policy, and standards items along the left edge. Then, put x's in the cells to show who governs what.

After that, when questions come up – How should this page look? etc. – people can refer to this framework document to see who makes the relevant decisions. In practice, when standards are well-implemented, team members can follow them without having to run back to the core team for every project or page. In this way, standards empower the full team while protecting and improving online quality.

● And that is how governance gets done.



## Summary

After you've put a digital-governance framework in place, ideally everyone on the content team embraces your organization's digital-content standards the way orchestra members embrace their sheet music. In this kind of standards-compliant environment, team members know who's supposed to do what when. Together, they make beautiful music – and give audiences the kind of experience they came for.

## About Content Marketing Institute

[Content Marketing Institute](#) is the leading global content marketing education and training organization, teaching enterprise brands how to attract and retain customers through compelling, multi-channel storytelling. CMI's [Content Marketing World](#) event, the largest content marketing-focused event, is held every September in Cleveland, Ohio, USA, and the [Intelligent Content Conference](#) event is held every spring. CMI publishes the bi-monthly magazine [Chief Content Officer](#), and provides strategic consulting and content marketing research for some of the best-known brands in the world. CMI, a UBM company, is a 2012-2015 Inc. 500/5000 company. Watch this [video](#) to learn more about CMI.

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## About ActiveStandards

[ActiveStandards](#), where Lisa Welchman serves as president of digital governance solutions, is providing global enterprises with end-to-end digital governance solutions through a powerful blend of technology and consulting services. These solutions help companies realize value from their online presence and mitigate risk by optimizing the management of complex digital operations and improving the quality and effectiveness of their digital content.

ActiveStandards has an international client base across all industry sectors and supports the digital governance programs of some of the largest brands in the world, including Unilever, Shell, CSC, HP, Thomson Reuters, and Canon. The seamless integration of its technology platform and consultancy services provides a complete solution for digital governance, helping companies get it right online.

Recommended resources:

- [Managing Chaos: Digital Governance by Design](#)
- [Research & Resources](#)