The Content Audit: Agony and Ecstasy

Julie Stromberg
Sr. Content Strategist
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Introduction

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- Sr. Content Strategist with Fearless
- Currently partnered with the Center for Medicaid and CHIP Services (CMCS)
- Member of the Content Support Center pilot team

Overview

What’s a content audit?

“A web content audit is an accounting of the web content your organization currently has online.”

Kristina Halvorson

Content Strategy for the Web

The Basics

Content audits are best for answering:

- What is the content about?
- Who is the content for?
- What is the intended purpose?
- Is the content clear, usable, and readable?
- Does the content contain a compelling call to action or next step?

The best time to do a content audit:

- During the discovery phase of a project (Sprint 0)
- Agnostic of a project as a content effort all its own

The Lego Analogy

They are the way

- Which pieces were used?
- How many pieces?
- What's the inner structure?
- Was there a plan developed for putting them together?

The Lego Analogy

What we didn't know

- The pink brain brick
- Some pieces were actually missing because the person skipped a step
- **There's a lot of content involved here!**

Content audits help ensure alignment to user needs and organizational goals.

Content problems are ours to solve together.

Fearless CS Team

Conducting a Content Audit

Let’s find the pink brain brick

Getting started

The Agony
Reviewing and analyzing content isn't difficult, but it can be time consuming and feel a bit tedious.

The Ecstasy
Rallying the entire working team and organization around broken links, outdated copy, and a renewed understanding of intended content purpose is invaluable.

And in the government space
Starting off a project with a content audit is a great way for contractors to get up to speed. An initial content audit also empowers government partners to make fully informed decisions regarding goals and direction.

Content Audit Types

Quantitative	Qualitative	Custom
Also known as a "content inventory," this is a list of all the content you have. Just like the inventory of products in a store.	**Goes a bit deeper than an inventory and seeks to also assess the quality and effectiveness of the content.**	**Assess what you want to learn, identify criteria, and then proceed to a develop audit plan specifically for your project's needs.**

Can this be automated?

You might be thinking "hey, I bet some of the agony can be offset by robots." The answer is yes, and no. Web crawlers and other tools can be helpful. However, human insight provides an in-depth look that robots simply can't provide.

Quantitative Audit Attributes

What to Record		
ID#	Source	Last Update
Title/Topics	Technical Home	Language
URL	Metadata	Description
Format	Analytics	Other
Ownership	Purpose	

Qualitative Audit Attributes

What to Record		
Usability	Accuracy	Brand/Voice Adherence
Findability	Audience	Readability
Knowledge Level	Organizational Value	Other

Tip

Use rating scales and predefined lists to make your qualitative audit measurable and the results shareable.

Content Audit Criteria

Attribute	Cell Values	Research Question	What to Record
Topic	<Topic 1> <Topic 2> <Topic 3>	What is this content about?	Primary topic; note secondary.
Purpose	<Inform> <Persuade> <Unknown> <Other>	What is the intended purpose of this content?	Primary purpose; not secondary.
Ownership	<Name> <Department> <Agency>	Who is responsible for ensuring the content is accurate and up to date?	Note specific person or role if known.

Audit Format

The Agony
A spreadsheet tends to work best as they allow you to set criteria as column headers and record content in rows.

The Ecstasy
If you then need to share findings outside of the working team, a report or presentation based on the spreadsheet might be best.

And in the government space
Figure out what works best for your team and the folks who can benefit from what you've learned during the auditing process.

Content Audit in Action

Case Study One: Lean Quantitative
CMCS T-MSIS Operations Dashboard & Data Quality Tool

Executive Summary

The problem
States had to go to two different locations in order to check if their Medicaid and CHIP data files had transferred to CMS correctly.

How might we
Consider a longer-term plan of how the two experiences might integrate so that state users can access desired data in one place.

Executive Summary

The Content Support Center was asked to consider the longer-term strategy from a content-focused perspective. Several contractors were already working on different aspects of the project

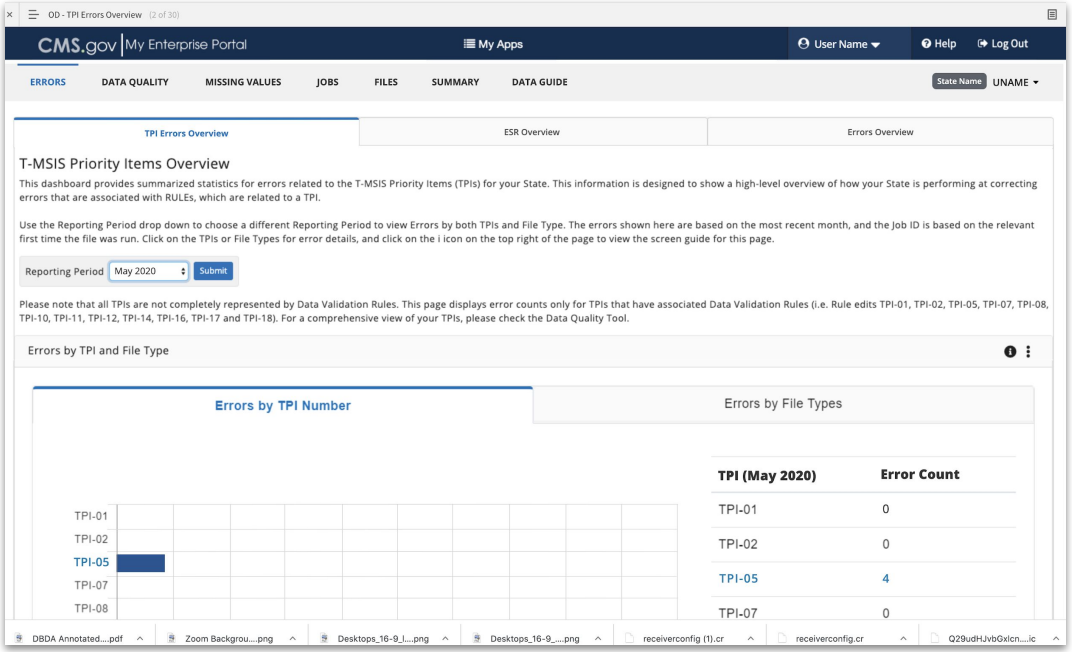
Intended audience: State employees responsible for collecting and submitting monthly Medicaid data files to CMS.

First thing we did? A content audit of the existing experience.

Where did it lead? We realized that it was too early to bring us in. Because of the knowledge gained, a meaningful conversation occurred.

Lean Quantitative Audit

- 20 screens
- Some “screens” were tabs within tabs on one screen
- Each tab had so much content that they needed to be audited individually

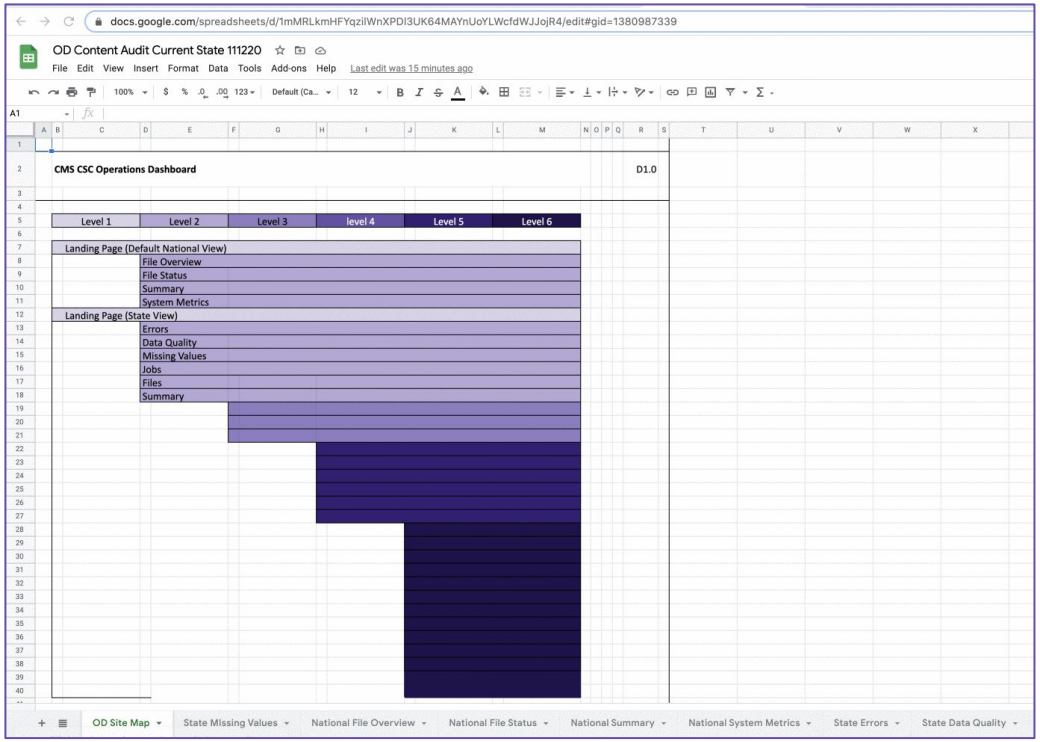


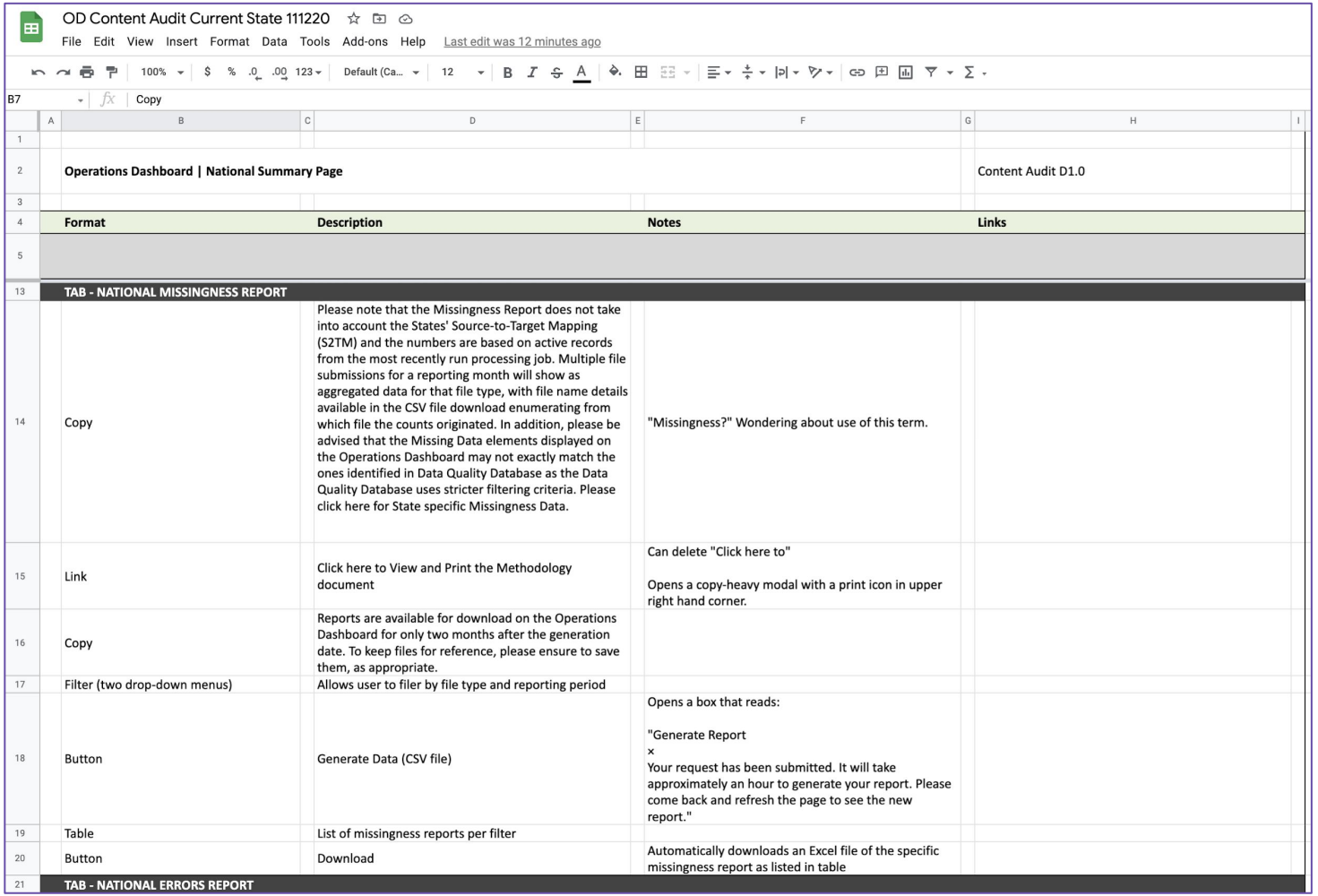
Lean Qualitative Criteria

Attribute	Cell Values	Research Question	What to Record
Format	<Copy> <Table> <Field> <Other as observed>	What content elements are on the page/screen	Element name
Description	<Description of the content element>	What does the content element convey or do?	Primary message or function
Link	<Destination>	Where does the link go?	Where the link takes the user
Notes	<Observations about content element>	What is observed about this content element?	Any issues or key aspects about the content element

Lean Quantitative Audit

- Sitemap
- Each screen has its own tab
- Basic criteria
- Format (ex. copy, filter, tab, tool tip, table)
- Description
- Notes
- Links (if applicable)





OD Content Audit Current State 111220

File Edit View Insert Format Data Tools Add-ons Help Last edit was 12 minutes ago

B7 Copy

1				
2	**Operations Dashboard | National Summary Page**			Content Audit D1.0
3				
4	**Format**	**Description**	**Notes**	**Links**
5				
13	**TAB - NATIONAL MISSINGNESS REPORT**			
14	Copy	Please note that the Missingness Report does not take into account the States' Source-to-Target Mapping (S2TM) and the numbers are based on active records from the most recently run processing job. Multiple file submissions for a reporting month will show as aggregated data for that file type, with file name details available in the CSV file download enumerating from which file the counts originated. In addition, please be advised that the Missing Data elements displayed on the Operations Dashboard may not exactly match the ones identified in Data Quality Database as the Data Quality Database uses stricter filtering criteria. Please click here for State specific Missingness Data.	"Missingness?" Wondering about use of this term.	
15	Link	Click here to View and Print the Methodology document	Can delete "Click here to" Opens a copy-heavy modal with a print icon in upper right hand corner.	
16	Copy	Reports are available for download on the Operations Dashboard for only two months after the generation date. To keep files for reference, please ensure to save them, as appropriate.		
17	Filter (two drop-down menus)	Allows user to filer by file type and reporting period		
18	Button	Generate Data (CSV file)	Opens a box that reads: "Generate Report × Your request has been submitted. It will take approximately an hour to generate your report. Please come back and refresh the page to see the new report."	
19	Table	List of missingness reports per filter		
20	Button	Download	Automatically downloads an Excel file of the specific missingness report as listed in table	
21	**TAB - NATIONAL ERRORS REPORT**			

Lean Quantitative Audit

Notes Examples

“Automatically downloads an Excel file of National data”

“Missingness? Wondering about use of this term.”

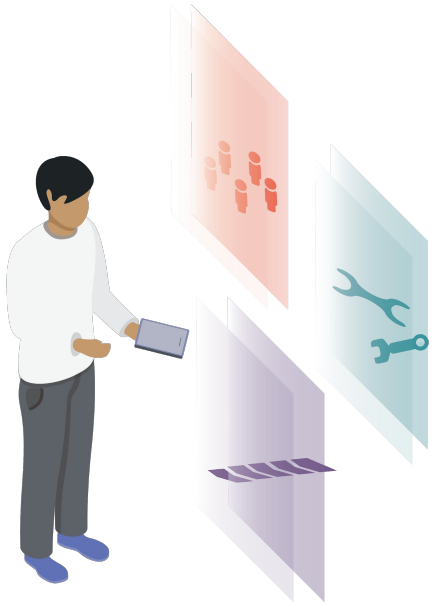
“Not sure how this link works. It goes to the ‘Errors Overview’ tab on the ‘Errors’ page of the Alabama section of the OD. Is this just an example of how to get state-specific data? There doesn't seem to be any way to specify which state.”

“Can delete ‘Please click here for.’”

Lean Quantitative Audit

Benefits

- The least “agonizing” option, BUT
- Works best when the goal is to familiarize with what’s already there
- Good option for experiences with a varied amount of content elements
- Helpful for itemizing and checking if content elements function as they should



Content Tip

Consider what your criteria might be for this type of audit.

Content Audit in Action

Case Study Two: Qualitative
CMCS T-MSIS Analytic Files (TAF)

Executive Summary

The problem

The current experience on Medicaid.gov is working for current needs when it comes to housing MACBIS TAF. But the desire is to expand so that MACBIS can share even more.

How might we

Create an experience on Medicaid.gov to accommodate a larger, and constantly growing, TAF collection.

Executive Summary

The Content Support Center was asked to partner with the primary statistician and owner of the existing Medicaid.gov pages with the goal of establishing an experience that could accommodate existing and future files.

Intended Audience: Internal CMS employees and external researchers

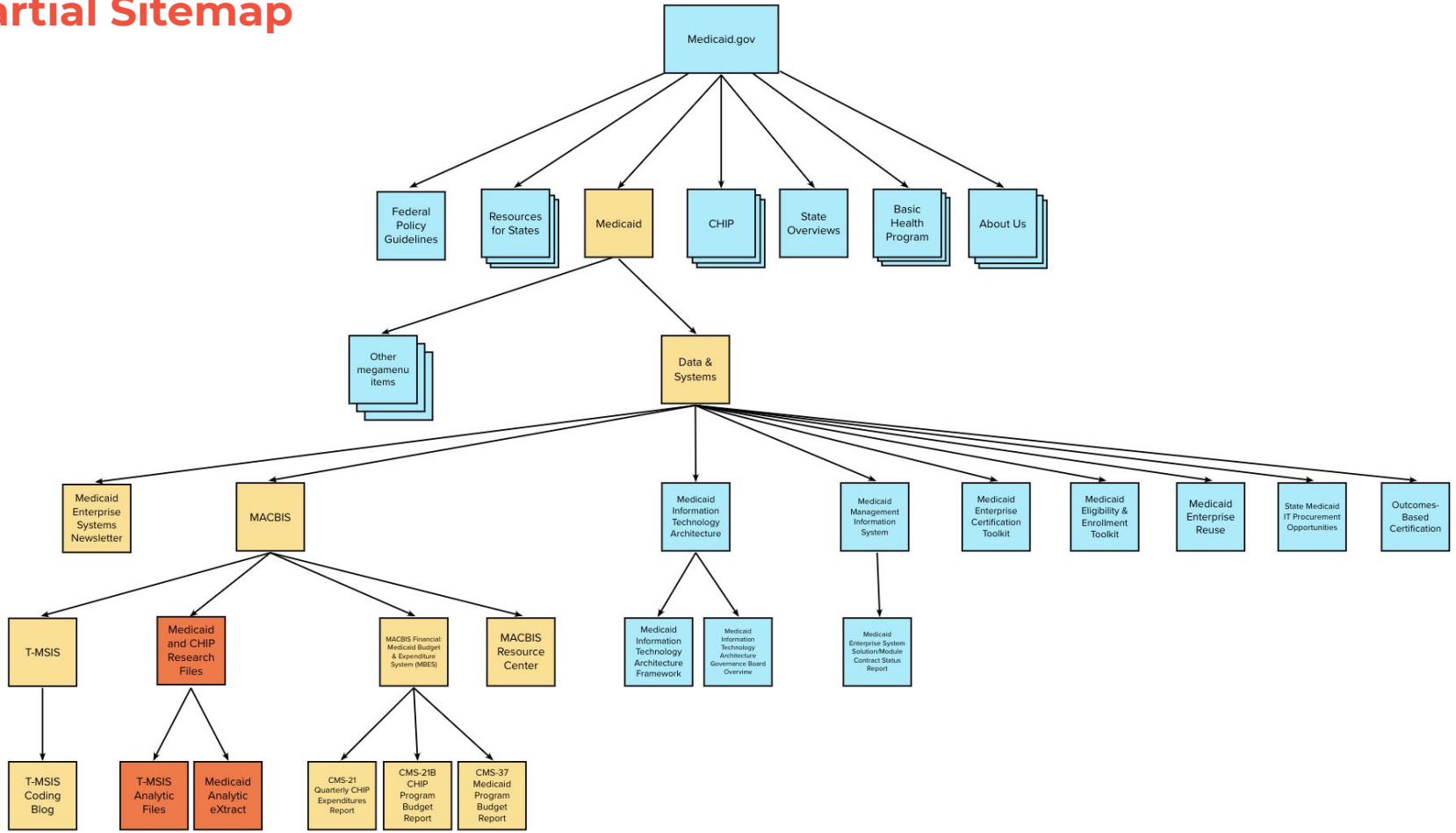
First thing we did? A sitemap and content audit of existing pages and others in the section.

Where did it lead? We ended up consolidating two pages, adding one (thus keeping the same footprint), removing outdated messaging, and creating a content library experience.

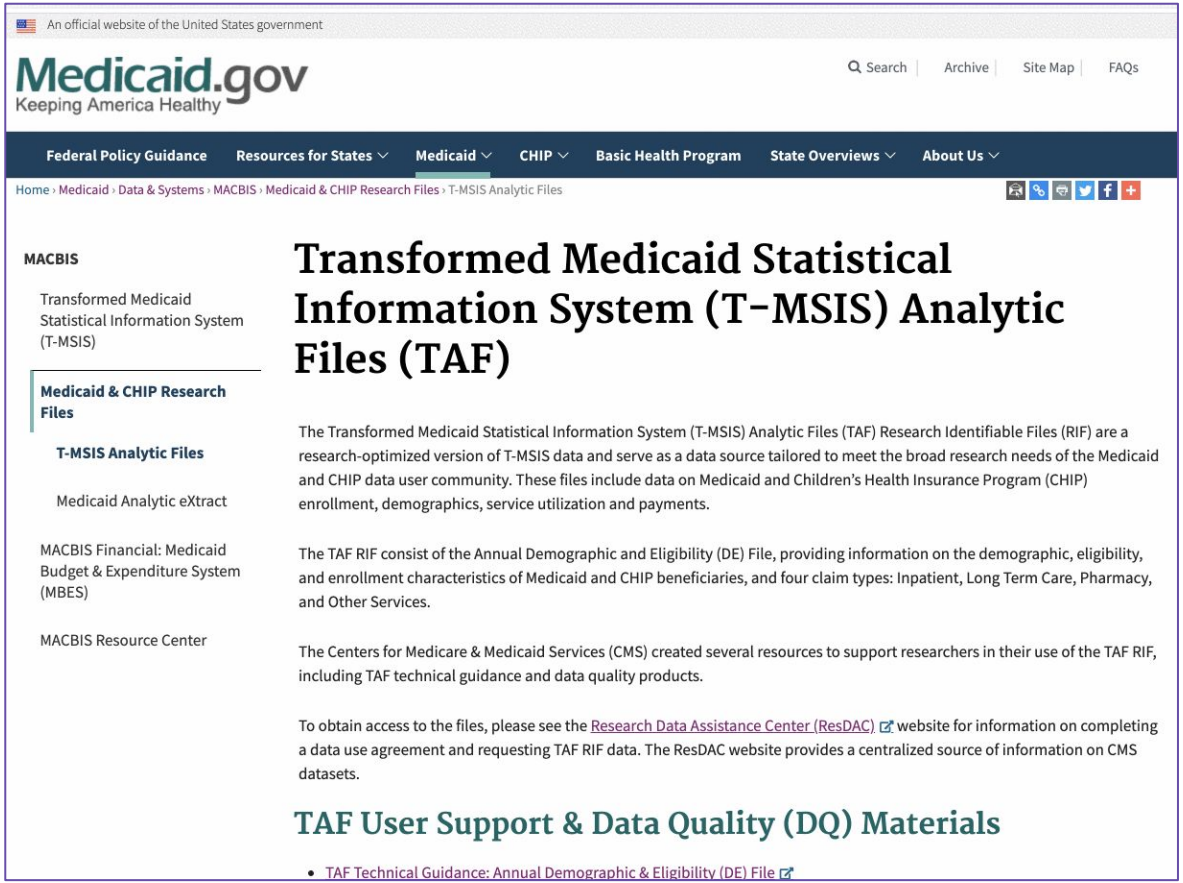
Qualitative Audit

- Ran a crawler
- Crawler did not pick up every page within the section
- Had to manually reconcile crawler findings with actual number of pages

Partial Sitemap



Existing Page Example



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Home › Medicaid › Data & Systems › MACBIS › Medicaid & CHIP Research Files › T-MSIS Analytic Files

MACBIS

- Transformed Medicaid Statistical Information System (T-MSIS)
- **Medicaid & CHIP Research Files**
  - **T-MSIS Analytic Files**
  - Medicaid Analytic eXtract
- MACBIS Financial: Medicaid Budget & Expenditure System (MBES)
- MACBIS Resource Center

Transformed Medicaid Statistical Information System (T-MSIS) Analytic Files (TAF)

The Transformed Medicaid Statistical Information System (T-MSIS) Analytic Files (TAF) Research Identifiable Files (RIF) are a research-optimized version of T-MSIS data and serve as a data source tailored to meet the broad research needs of the Medicaid and CHIP data user community. These files include data on Medicaid and Children's Health Insurance Program (CHIP) enrollment, demographics, service utilization and payments.

The TAF RIF consist of the Annual Demographic and Eligibility (DE) File, providing information on the demographic, eligibility, and enrollment characteristics of Medicaid and CHIP beneficiaries, and four claim types: Inpatient, Long Term Care, Pharmacy, and Other Services.

The Centers for Medicare & Medicaid Services (CMS) created several resources to support researchers in their use of the TAF RIF, including TAF technical guidance and data quality products.

To obtain access to the files, please see the Research Data Assistance Center (ResDAC) website for information on completing a data use agreement and requesting TAF RIF data. The ResDAC website provides a centralized source of information on CMS datasets.

TAF User Support & Data Quality (DQ) Materials

- TAF Technical Guidance: Annual Demographic & Eligibility (DE) File

Qualitative Criteria

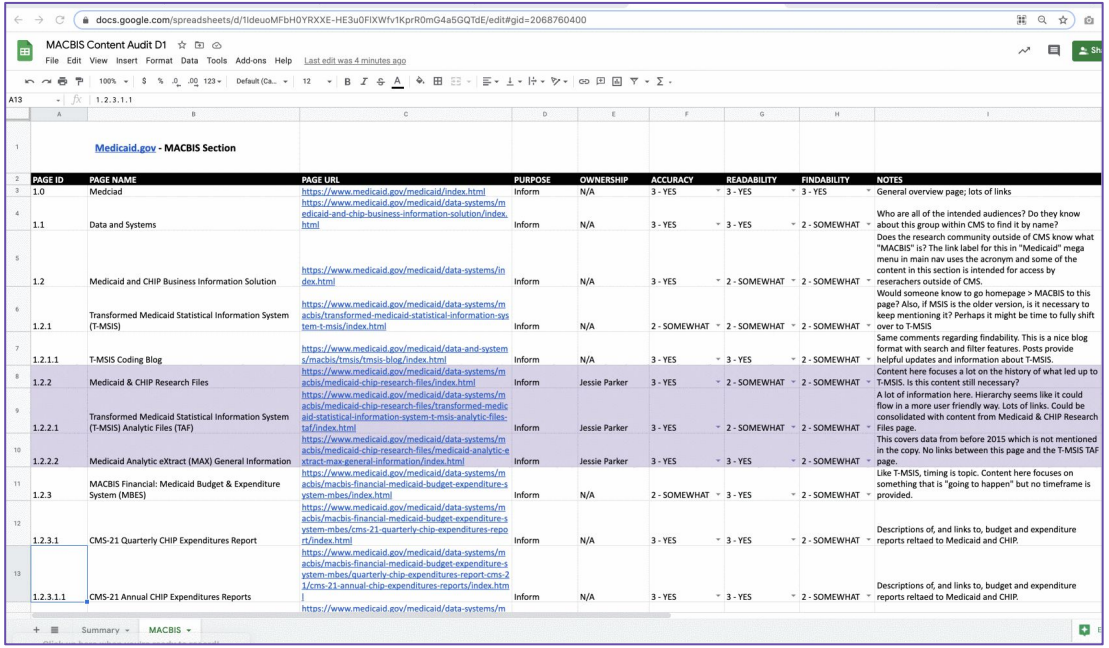
Attribute	Cell Values	Research Question	What to Record
Page ID	<Number>	N/A	Progessive number
Page Title/Name	<Title/Name>	N/A	Title of page
Page URL	<URL>	N/A	Page URL
Purpose	<Inform> <Persuade> <Unknown> <Other>	What is the intent of the content?	Select a word that best describes the intent of the content
Ownership	<Name>	Who is the decision maker regarding this content?	Name of key decision maker

Qualitative Criteria

Attribute	Cell Values	Research Question	What to Record
Accuracy	<1 - No> <2 - Somewhat> <3 - Yes>	Is the content accurate?	Selection
Readability	<1 - No> <2 - Somewhat> <3 - Yes>	Is the content readable and easy to comprehend?	Selection
Findability	<1 - No> <2 - Somewhat> <3 - Yes>	Is this content easy to find?	Selection
Notes	<Observations about content>	What is observed about this content?	Any issues or key aspects about the content

Qualitative Audit

- Read every word
- Followed every link; review where it goes (another page, PDF, etc.)
- Noted what makes sense, what doesn't; which links work, which don't; etc.
- Rated each page for accuracy, readability, and findability



docs.google.com/spreadsheets/d/1IdeuoMFbH0YRXXE-HE3u0FIXWfv1KprR0mG4a5GQTdE/edit#gid=2068760400

MACBIS Content Audit D1

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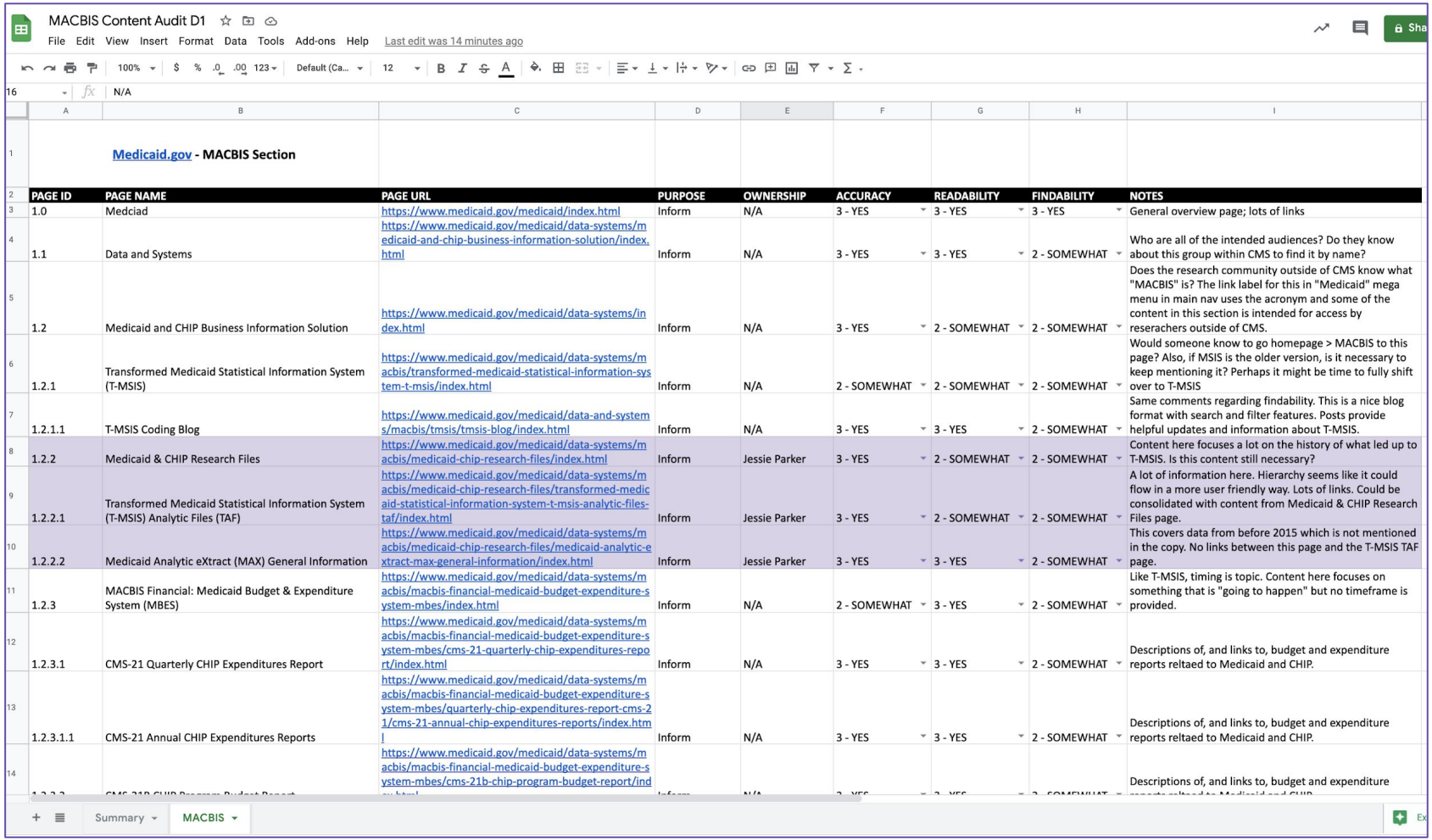
A13 1.2.3.1.1

Medicaid.gov - MACBIS Section

PAGE ID	PAGE NAME	PAGE URL	PURPOSE	OWNERSHIP	ACCURACY	READABILITY	FINDABILITY	NOTES
1.0	Medcaid	https://www.medicaid.gov/medicaid/index.html	Inform	N/A	3 - YES	3 - YES	3 - YES	General overview page; lots of links
1.1	Data and Systems	https://www.medicaid.gov/medicaid/data-systems/medicaid-and-chip-business-information-solution/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Who are all of the intended audiences? Do they know about this group within CMS to find it by name?
1.2	Medicaid and CHIP Business Information Solution	https://www.medicaid.gov/medicaid/data-systems/index.html	Inform	N/A	3 - YES	2 - SOMEWHAT	2 - SOMEWHAT	Does the research community outside of CMS know what "MACBIS" is? The link label for this in "Medicaid" mega menu in main nav uses the acronym and some of the content in this section is intended for access by researchers outside of CMS.
1.2.1	Transformed Medicaid Statistical Information System (T-MSIS)	https://www.medicaid.gov/medicaid/data-systems/macbis/transformed-medicaid-statistical-information-system-t-msis/index.html	Inform	N/A	2 - SOMEWHAT	2 - SOMEWHAT	2 - SOMEWHAT	Would someone know to go homepage > MACBIS to this page? Also, if MSIS is the older version, is it necessary to keep mentioning it? Perhaps it might be time to fully shift over to T-MSIS
1.2.1.1	T-MSIS Coding Blog	https://www.medicaid.gov/medicaid/data-and-systems/macbis/tmsis/tmsis-blog/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Same comments regarding findability. This is a nice blog format with search and filter features. Posts provide helpful updates and information about T-MSIS.
1.2.2	Medicaid & CHIP Research Files	https://www.medicaid.gov/medicaid/data-systems/macbis/medicaid-chip-research-files/index.html	Inform	Jessie Parker	3 - YES	2 - SOMEWHAT	2 - SOMEWHAT	Content here focuses a lot on the history of what led up to T-MSIS. Is this content still necessary?
1.2.2.1	Transformed Medicaid Statistical Information System (T-MSIS) Analytic Files (TAF)	https://www.medicaid.gov/medicaid/data-systems/macbis/medicaid-chip-research-files/transformed-medicaid-statistical-information-system-t-msis-analytic-files-taf/index.html	Inform	Jessie Parker	3 - YES	2 - SOMEWHAT	2 - SOMEWHAT	A lot of information here. Hierarchy seems like it could flow in a more user friendly way. Lots of links. Could be consolidated with content from Medicaid & CHIP Research Files page.
1.2.2.2	Medicaid Analytic eXtract (MAX) General Information	https://www.medicaid.gov/medicaid/data-systems/macbis/medicaid-chip-research-files/medicaid-analytic-extract-max-general-information/index.html	Inform	Jessie Parker	3 - YES	3 - YES	2 - SOMEWHAT	This covers data from before 2015 which is not mentioned in the copy. No links between this page and the T-MSIS TAF page.
1.2.3	MACBIS Financial: Medicaid Budget & Expenditure System (MBES)	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/index.html	Inform	N/A	2 - SOMEWHAT	3 - YES	2 - SOMEWHAT	Like T-MSIS, timing is topic. Content here focuses on something that is "going to happen" but no timeframe is provided.
1.2.3.1	CMS-21 Quarterly CHIP Expenditures Report	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/cms-21-quarterly-chip-expenditures-report/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Descriptions of, and links to, budget and expenditure reports reltaed to Medicaid and CHIP.
1.2.3.1.1	CMS-21 Annual CHIP Expenditures Reports	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/quarterly-chip-expenditures-report-cms-21/cms-21-annual-chip-expenditures-reports/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Descriptions of, and links to, budget and expenditure reports reltaed to Medicaid and CHIP.
		https://www.medicaid.gov/medicaid/data-systems/m						

Summary MACBIS



MACBIS Content Audit D1

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Medicaid.gov - MACBIS Section

PAGE ID	PAGE NAME	PAGE URL	PURPOSE	OWNERSHIP	ACCURACY	READABILITY	FINDABILITY	NOTES
1.0	Medciad	https://www.medicaid.gov/medicaid/index.html	Inform	N/A	3 - YES	3 - YES	3 - YES	General overview page; lots of links
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1.2	Medicaid and CHIP Business Information Solution	https://www.medicaid.gov/medicaid/data-systems/index.html	Inform	N/A	3 - YES	2 - SOMEWHAT	2 - SOMEWHAT	Does the research community outside of CMS know what "MACBIS" is? The link label for this in "Medicaid" mega menu in main nav uses the acronym and some of the content in this section is intended for access by reserachers outside of CMS.
1.2.1	Transformed Medicaid Statistical Information System (T-MSIS)	https://www.medicaid.gov/medicaid/data-systems/macbis/transformed-medicaid-statistical-information-system-t-msis/index.html	Inform	N/A	2 - SOMEWHAT	2 - SOMEWHAT	2 - SOMEWHAT	Would someone know to go homepage > MACBIS to this page? Also, if MSIS is the older version, is it necessary to keep mentioning it? Perhaps it might be time to fully shift over to T-MSIS
1.2.1.1	T-MSIS Coding Blog	https://www.medicaid.gov/medicaid/data-and-systems/macbis/tmsis/tmsis-blog/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Same comments regarding findability. This is a nice blog format with search and filter features. Posts provide helpful updates and information about T-MSIS.
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1.2.2.1	Transformed Medicaid Statistical Information System (T-MSIS) Analytic Files (TAF)	https://www.medicaid.gov/medicaid/data-systems/macbis/medicaid-chip-research-files/transformed-medicaid-statistical-information-system-t-msis-analytic-files-taf/index.html	Inform	Jessie Parker	3 - YES	2 - SOMEWHAT	2 - SOMEWHAT	A lot of information here. Hierarchy seems like it could flow in a more user friendly way. Lots of links. Could be consolidated with content from Medicaid & CHIP Research Files page.
1.2.2.2	Medicaid Analytic eXtract (MAX) General Information	https://www.medicaid.gov/medicaid/data-systems/macbis/medicaid-chip-research-files/medicaid-analytic-extract-max-general-information/index.html	Inform	Jessie Parker	3 - YES	3 - YES	2 - SOMEWHAT	This covers data from before 2015 which is not mentioned in the copy. No links between this page and the T-MSIS TAF page.
1.2.3	MACBIS Financial: Medicaid Budget & Expenditure System (MBES)	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/index.html	Inform	N/A	2 - SOMEWHAT	3 - YES	2 - SOMEWHAT	Like T-MSIS, timing is topic. Content here focuses on something that is "going to happen" but no timeframe is provided.
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1.2.3.1.1	CMS-21 Annual CHIP Expenditures Reports	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/quarterly-chip-expenditures-report-cms-21/cms-21-annual-chip-expenditures-reports/index.html	Inform	N/A	3 - YES	3 - YES	2 - SOMEWHAT	Descriptions of, and links to, budget and expenditure reports reltaed to Medicaid and CHIP.
[illegible]	[illegible]	https://www.medicaid.gov/medicaid/data-systems/macbis/macbis-financial-medicaid-budget-expenditure-system-mbes/cms-21b-chip-program-budget-report/index.html	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Descriptions of, and links to, budget and expenditure reports reltaed to Medicaid and CHIP.

Summary MACBIS

MACBIS Content Audit D1

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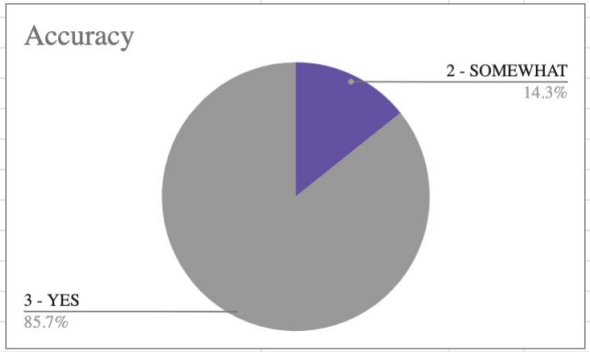
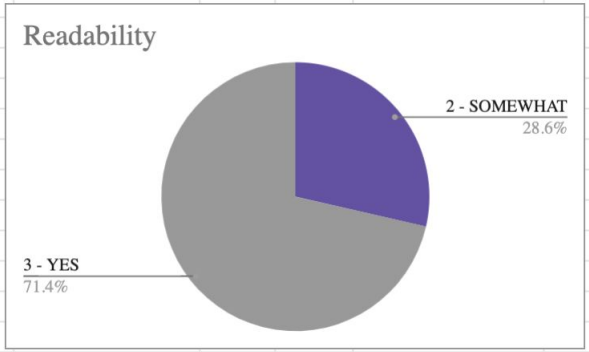
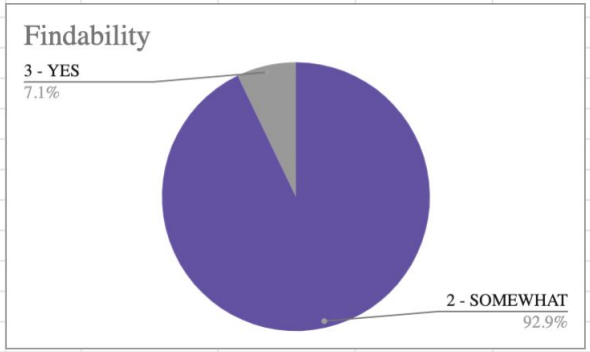
H21

T-MSIS Analytic Files (TAF)

SECTION	ACCURACY	#	%	READABILITY	#	%	FINDABILITY	#	%
MACBIS	1 - NO	0	0%	1 - NO	0	0%	1 - NO	0	0%
	2 - SOMEWHAT	2	14%	2 - SOMEWHAT	4	29%	2 - SOMEWHAT	13	93%
	3 - YES	12	86%	3 - YES	10	71%	3 - YES	1	7%







Qualitative Audit

Notes Examples

“Does the research community outside of CMS know what ‘MACBIS’ is? The link label for this in ‘Medicaid’ mega menu in main nav uses the acronym and some of the content in this section is intended for access by researchers outside of CMS.”

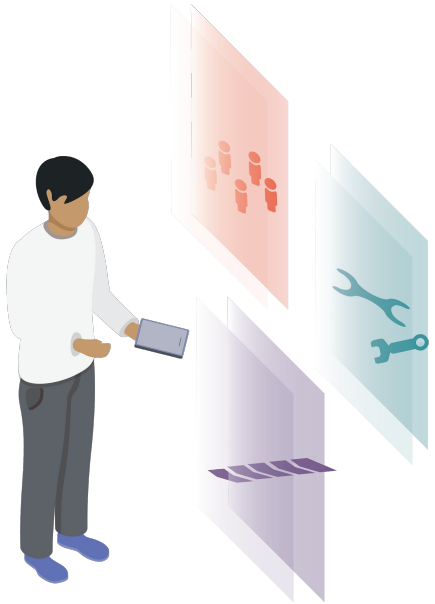
“This covers data from before 2015 which is not mentioned in the copy. No links between this page and the T-MSIS TAF page.”

“A lot of information here. Hierarchy seems like it could flow in a more user friendly way. Lots of links. Could be consolidated with content from Medicaid & CHIP Research Files page.”

Qualitative Audit

Benefits

- A bit higher on the agony scale, BUT
- Works best when the goal is to understand and evaluate content
- Good option for experiences that are heavy on the messaging side
- Helpful for recording and assessing if content is performing as intended



Content Tip
Consider what your criteria might be for this type of audit.

The Wrap Up

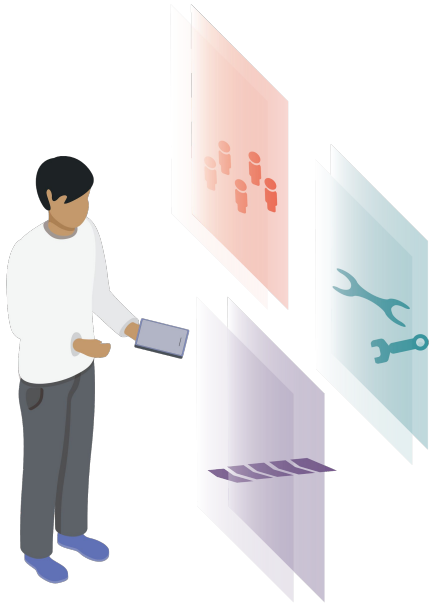
So you've completed your audit, now what?

Post-audit Analysis

Sharing what you learned

- Synthesize all notes
- Create visualizations of ratings
- Map all content findings to organizational goals; identify what is working, what is not
- Consider user needs and determine recommendations for next steps (ex. content research and/or testing opportunities)
- Draft report

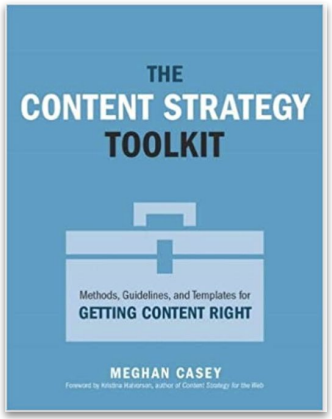
Content Tip
Report should resonate with stakeholder so consider format.



Resources

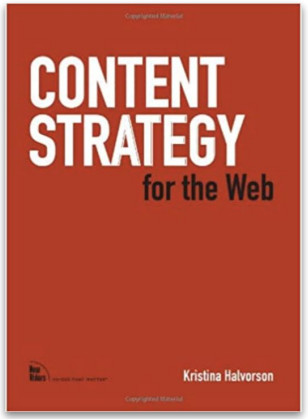
To what, and who, we owe this presentation

The Content Strategy Toolkit by Meghan Casey



“The Blue Book”

Content Strategy for the Web by Kristina Halvorson



“The Red Book”

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