THE DEFINITIVE GUIDE TO CONTENT AUDITS USING 'ONLINE KANBAN'

c+p digital

Content audits.

Not the favorite assignment of most marketers in large organizations. This usually involves the review of hundreds of pieces of content housed across websites and microsites that you didn't know existed!

And then you need to deal with all of the different content owners who want to weigh in. We hear you. It sounds painful.

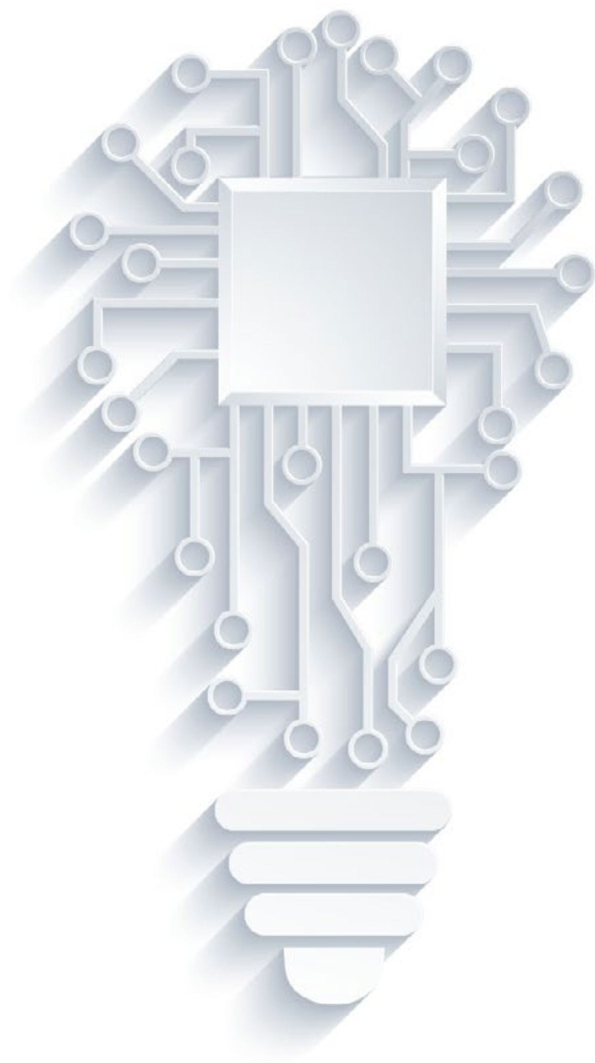
Here's what might help you reframe your thinking.

A content audit is the best thing you can do to increase your company's digital ROI. So, it's a noble cause.

However, just saying that to yourself is unlikely to stop those sleepless nights you spend thinking about doing one.

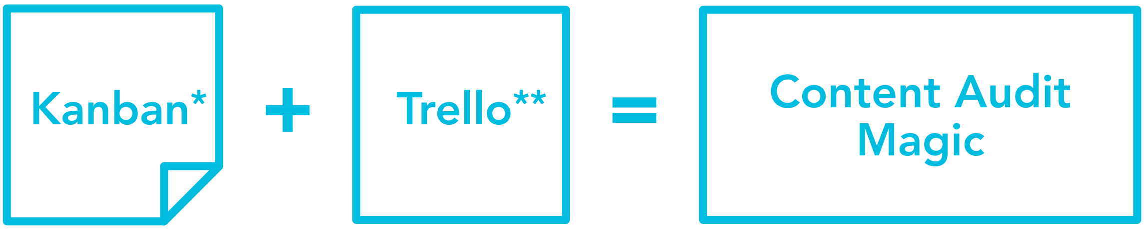
So we're going to let you in on a little secret.

We use a game-changing system for large-scale content audits.



It's a system that's been under your nose for ages. A system that lets you easily move from one phase to the next of an audit.

We've tried a few, but (ta-da, big reveal), we've found that a virtual Kanban method using project management software like **Trello** (no affiliation to us) really works.



However, there are very few companies using the Kanban/Trello method for large content audits. We like to think we're one of the first converts to this digitized way of using an old Japanese manufacturing method. And we think you'll be too once you've finished reading this.

How large is too large for a spreadsheet, when doing a content audit?

Most people approach a content audit with an excel spreadsheet as their tool of choice. And if you don't have a lot of content, this could work wonderfully for you. A simplified system works well for the solopreneur or small business owner. If that's you, here's a great free resource to get you going on your audit - **the c+p guide to auditing your content.**

Now, for any audit involving more than 100 pieces of content, you are going to need 2 things:

1. an organizational process, to structure and categorize content pieces
2. some kind of visual system that can be used for multiple stakeholders to gain visibility in a pull format, without overwhelm and TMI (because when you're into a couple of 100s of content pieces and beyond, you can bet there will be multiple stakeholders. And in 2019, you can also bet there'll be a need to collaborate with people beyond your physical location).

* The Kanban method is an old manufacturing method used in modern day project management. It's typically used offline, on a large physical board, meant for in-person collaboration. Much more detail throughout this piece.

** This is not a sponsored piece. Trello has no idea we're writing it. This is an inside peek into a system we successfully use for large audits, with great impact. And we want to share.

Taking the 'Kanban board' online, for more agile collaboration

This is the digital age. Even if you're all in one office location, coordinating flexible work times and travel schedules is the kind of nightmare that can put people off the entire prospect of complex projects like audits.

We live and work differently now. We don't have endless amounts of administrative help to keep our calendars balanced with those of others. So we discover smarter ways to work. It's the emotional intelligence evolution of all the digital transformation we're going through.

Now mash that up with the fact that agile project management systems like Kanban and Scrum have increasingly proven themselves to be effective. They've made their way out of the deep tech circuits into the more mainstream for that very reason.

One last mash up and it'll all make sense! Trello. Take the Kanban board online with a software that allows you to organize in a flow, offers full visual visibility, and fosters collaboration and efficiency. (We tried a few and this worked best to replicate our offline visions for the large audits we've worked on. Jira can do similar things. It just comes at a higher price point.)

So that's what we do.

We use the Kanban method of agile project management to audit 1000s of pieces of content, online, using a cloud-based project management software - Trello.

Revolutionary? We think so. It's a nifty way to combine the agile flow of the Kanban method and the ease of real-time SaaS.

It's impossible to believe that we're among the first to use these two tools in a (easy, intuitive) way that seems almost tailormade for content audits! But, crazy as it might seem, we can't find anyone else doing it. (And we have Ninja finding skills.)

Or at least, if anyone IS practicing this with prowess, they're doing themselves a disservice on the digital presence front (We'd love to **hear from you** if you're already using a variant on online Kanban PM - for collaboration, and so we can help you get found. The world needs to hear about the ease of this!)

Easy and fun?

Two words you'd never expect to hear in content auditing

Think multiple people involved in multiple aspects of a content audit in multiple parts of the world, working on each piece of content in the audit, without having to attend meetings or waste any time. And with the huge added benefit of not having long, copy-all email threads in your inbox.

Trello is simple to use, increases cross-functional collaboration and motivates the team as everyone becomes part of the process of making things flow. This might sound hard to believe, but it actually becomes easy and fun to collaborate and share information throughout the content audit.

Why?

We believe it's because it breaks down the overwhelm of a mammoth sounding task. And it puts the management of everything, at your fingertips, in real time. This makes it so much easier to get to.

The types of audit that the Kanban/Trello mix works for:

If you're pressed for time, we're just going to sum it up for you.

It works for every type of audit.

From brand and digital footprint audits, to section or website wide content updates, to performance metrics reports, and UX audits.

If you've read this far, you know what a content audit is worth, or you've been tasked with one and don't know where to start. In the latter case, it's worth spending a minute to lay out what an audit can do for you.

Digital ROI is the number one request from leaders to the marketing department. It's the inevitable next question to anyone that has been practicing content marketing for a while. And it's our job as marketers to answer it well.

Content audits are the first step to discovering what your ROI is. An audit can happen piecemeal - one section of your content portfolio at a time - or site/alternative property-wide.

Why would you need to audit your content?

1. To update your information for regulatory reasons (often seen in finance and health)
2. To update and control your digital footprint (what people find when they search for your brand)
3. To establish what materials you have and what their usage and results are/to improve their performance
4. To launch/relaunch something, leveraging assets you have
5. To improve the experiences being offered to customers online

Here are some typical cases for which you might use a content audit.

1. Audit your brand's performance

Every company needs a brand check-in once in a while. A brand audit allows you to evaluate your brand's performance against stated targets. Using the online Kanban method for the audit process helps structure this analysis, letting you easily move from one phase to the next, both providing the information you need for approvals, and subsequently helping you walk through the execution of the items you've audited.

You can **include anything to the audit structure** and set tasks accordingly, taking into account internal and external branding, competitor benchmarking, positioning, voice, culture, sales and USPs. It will reveal conversion rates, channels that work best and other key metrics. This helps you get really clear on what you want to achieve and what you need to do to get there, monitoring visually as you go.

2. Map digital footprint and compliance

An online Kanban content audit provides the big-picture view of your content. What you have, what you don't, and what you need. You'll be able to see if your digital footprint is squeaky-clean across all channels. While you've probably heard of or done a compliance audit, we think compliance should be integrated across the content audit process.

Simply put, all your content should adhere to the standards, rules and regulations that govern your particular industry. This is particularly relevant to finance and health industries, because these rules and regulations are constantly changing and your content needs to be up to date with the latest legal and regulatory frameworks.

3. Evaluate/performance metrics

A content audit should include performance metrics across all your content. Using Trello, you can easily see what content is performing across different channels so you can take action; amplify it, create more of it or repurpose it. Tasks can be assigned to different team members in different locations and approvals can be quickly obtained from usually hard-to-reach higher-ups. We like the definition by **Ahrefs**...they call a content audit the "online equivalent of a spring clean". Mapping everything out in Trello allows you to focus on metrics so you can get better optimization results.

4. Identify user experiences and engagement

We've talked about user experience and engagement in the **final word(s) on the quality vs quantity debate (clearly there's never a final word for us!).**

We like Trello for content auditing because it allows your team to deep dive into the user experience you're providing so you can visually see what's working and what's not. You can then both map your content to the audience journey and replicate high-performing content experiences.

Why Kanban in two words?

Japanese efficiency.

Kanban is a visual workflow management process that was developed for Toyota by Japanese engineers in the 1940s. Inspired by grocery stores who try eliminate waste by stocking only as much product as people will buy, Toyota's manufacturing teams started using cards (or Kanbans) to signal to other divisions when they needed parts from supply or storage.

Kanban in the era of digital marketing

In a nutshell, Kanban comes from a philosophy of LEAN production for a JIT (just-in-time) inventory control system that is more efficient and conserves resources by eliminating waste. So far, Kanban has primarily been used in project management, mostly in technology and manufacturing. It's one of 2 methods of Agile project management, popular with developers of technology (alongside the Scrum method). It's slowly starting to make waves in adjacent industries, like digital marketing. Using it for content audits is the next logical step, one that can become a key part of your overall content strategy.

What exactly is the Kanban system?

In its simplest form, the system involves a Kanban board - a white/blackboard that can be organized into 3 columns, for example: ‘to do’, ‘doing’ and ‘done’. Let’s say you’re setting out to achieve a batch of tasks that involve multiple people.

You take a sticky note (or card) and write a task on it, then place it in the ‘to do’ column. Write the rest of the tasks on more sticky notes, one task per note, and then bring everyone responsible for doing these tasks into the room. Either assign tasks from the “to do” column or let them choose their own tasks.

When an assignee starts the task, she moves the sticky note into the ‘doing’ column. If there are any notes about the task one might need to get it done, or progress that should be mentioned, these can be written down on the sticky note.

As soon as the task is completed it is moved to the ‘done’ column.

This is repeated/executed by each of the team members in a state of ‘flow’ to keep the items moving, and unblocking bottlenecks through regular ‘stand ups’.

Let it flow: A focus on continuous improvement

Tasks flow from one phase to the next, and through to completion. It can be much more complex and involved as phases and numbers of items can differ from project to project, but the principle remains the same. Our clients really like the fact that entire marketing teams can adopt Kanban without making painful changes to their current workflows. It keeps team members on the same page and, because the amount of work in progress is limited, highlights issues and bottlenecks that can be regularly cleared.

The Kanban method allows you to display each stage within a process and how they interconnect. Even though it doesn’t focus on time tracking like other project management methods like Scrum, it’s a fluid process that improves productivity and quality, building a positive culture of continuous improvement.

Using Kanban with daily standups. Or not.

In a content audit usually, that involves several team members, especially if they are cross-functional, we recommend a daily, 15-minute stand up with all team members.

This sounds painful to the uninitiated, we know. The first time we were introduced to the idea of a daily Kanban, we were entirely unimpressed. Daily meetings are just what we need! Nope. No thank you. But we caved, and trepidation turned to the realization that it really isn't painful at all.

1. First, replace 'meeting' with 'call/zoom/skype'. There! You already feel more receptive to this idea.
2. Then remind yourself that the philosophy at play here is 'flow'. Frequent, focussed, collaborative contact is powerful, and things WILL keep moving. As if by magic. But also, by Trello.
3. And finally, remind yourself that a standup doesn't have to be daily, and even when it needs to be daily, it is a fluid process. So if you're not needed in one section, you can gracefully excuse yourself. (Although the system does rely on the power of collective brainstorm for problem-solving, so full presence helps.)

Feel free to ignore our advice, but we've found that the Kanban stand up focuses on a specific board in order to minimize time spent and identify bottlenecks. It helps to quickly clear up any confusion (especially if several members work remotely), provides transparency and builds team culture.

Once you're into daily stand up meetings, you'll become cult-like in your devotion to them.

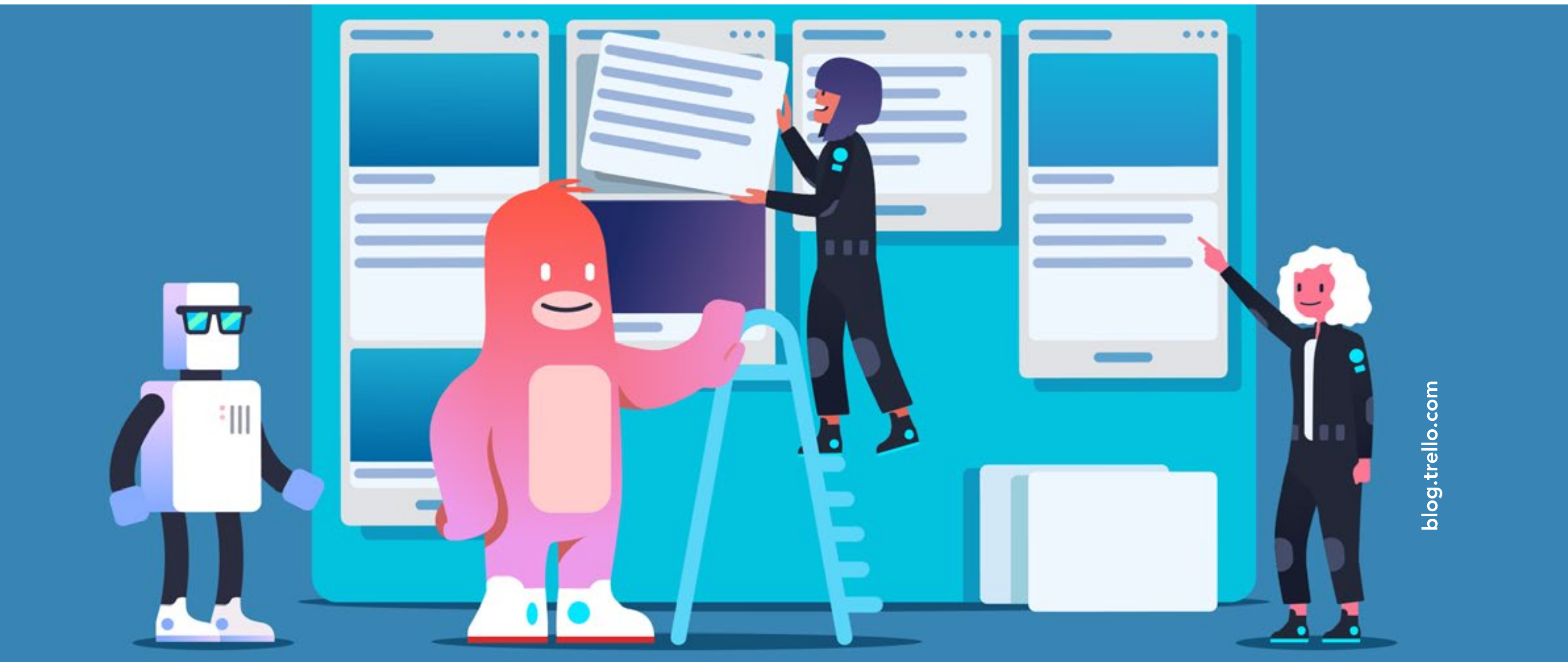
Agile, fun and creative content auditing with Trello

Trello is our Kanban app of choice.

It's a project management tool that we think is perfectly suited to applying Kanban to your workflow. It's a highly visual and fluid way of organizing large amounts of content and remote team members to ensure that nothing slips through the cracks. It's not only intuitive and easy to use, it allows you to customize various elements, such as adding information in various formats (images, files, links), assigning tasks to team members and creating lists according to priority areas and time sensitivities. It integrates to several platforms to help you store things and access files.

One aspect we really like is that you literally see pieces of content flowing across the board as each step of the audit is completed. You don't need to wait for an entire group of similar content to progress. You can move each piece as soon as it's done. Remember the key word here is 'flow'. Keep things moving and you'll start to see how an overwhelming assignment becomes quite manageable.

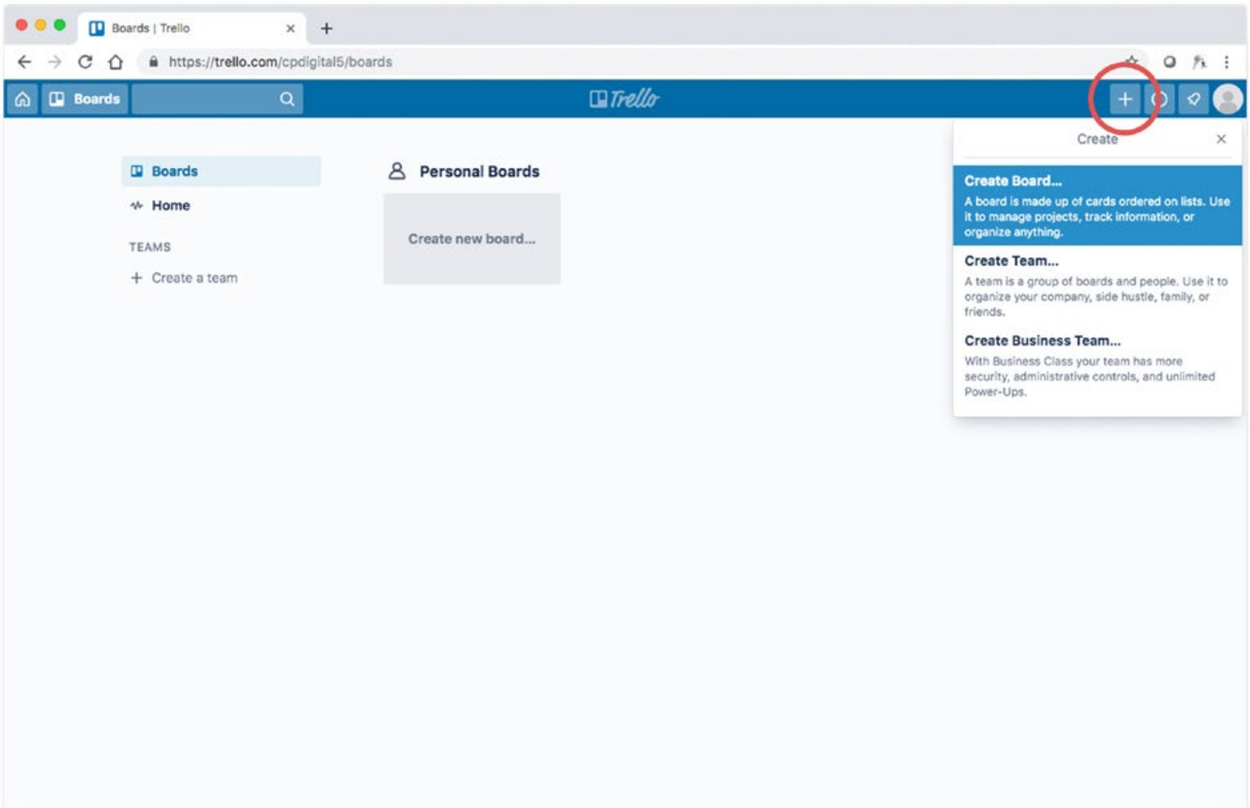
It also has a very useful search feature that you can use to search across boards. And for those of us who love being fun and creative, it allows some silly stuff like stickers and colouring of things.



How to use Trello for your content audit

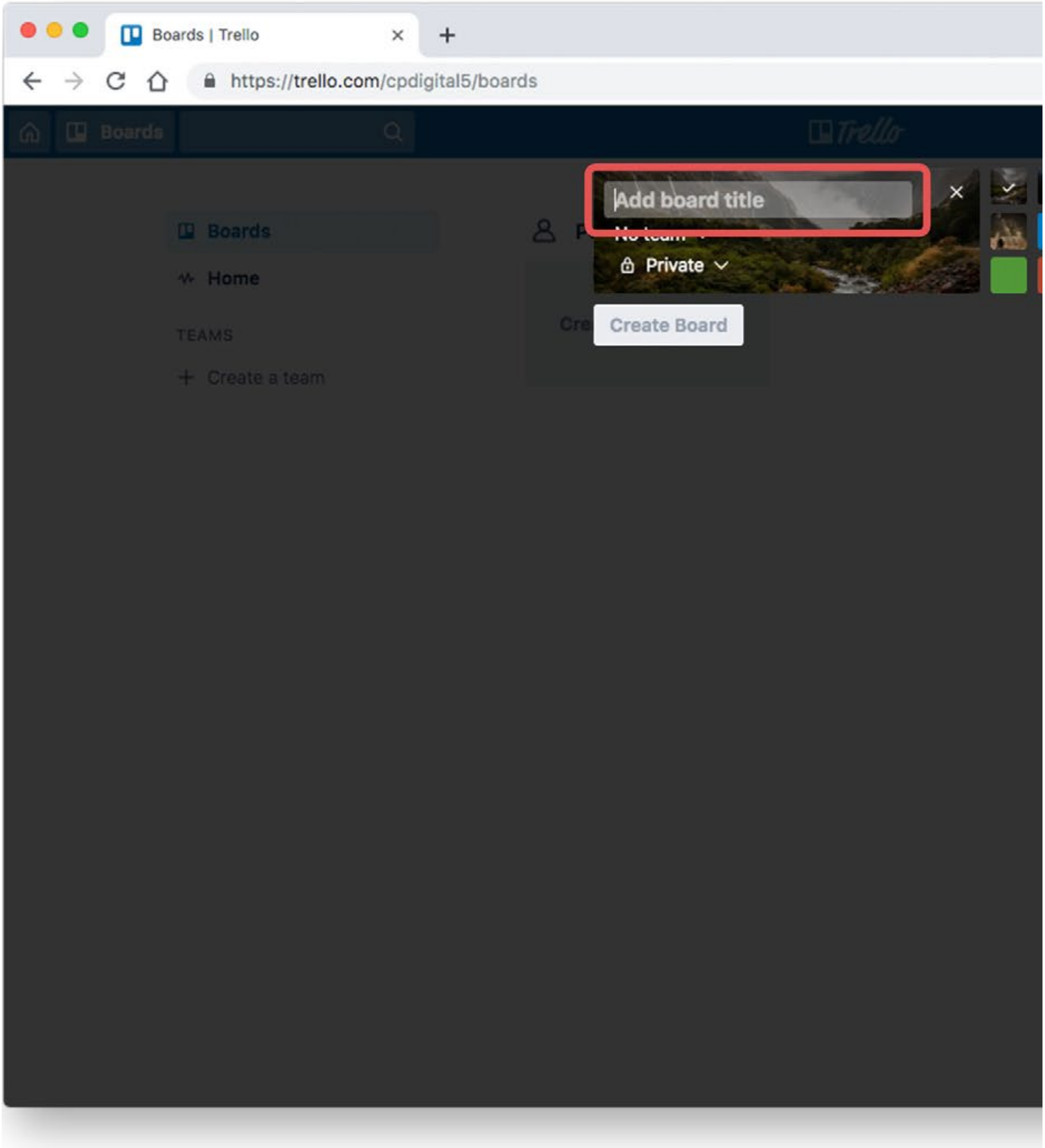
We recently used Trello to do a monumental content audit for **MacKenzie Investments** to update, centralize and automate their advisor content library. We're going to walk you through some of the steps in the process of an audit involving a 1000 or more pieces of content:

1. **After signing up for Trello, create your project board, by clicking on the + button on the top right of your dashboard.**



2. **Name your board according to activity or organizational structure of the company you're auditing. One company might have several boards across several content channels or functions.**

   For example, one board could be 'Marketing Materials' and another board could be 'Product Information'. However you group your content, mimic that on your Trello boards.

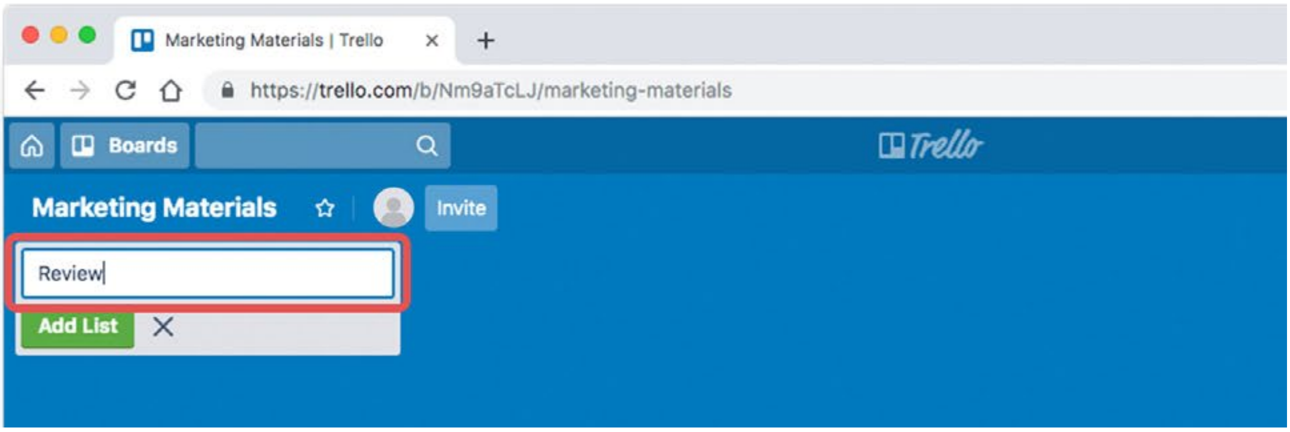


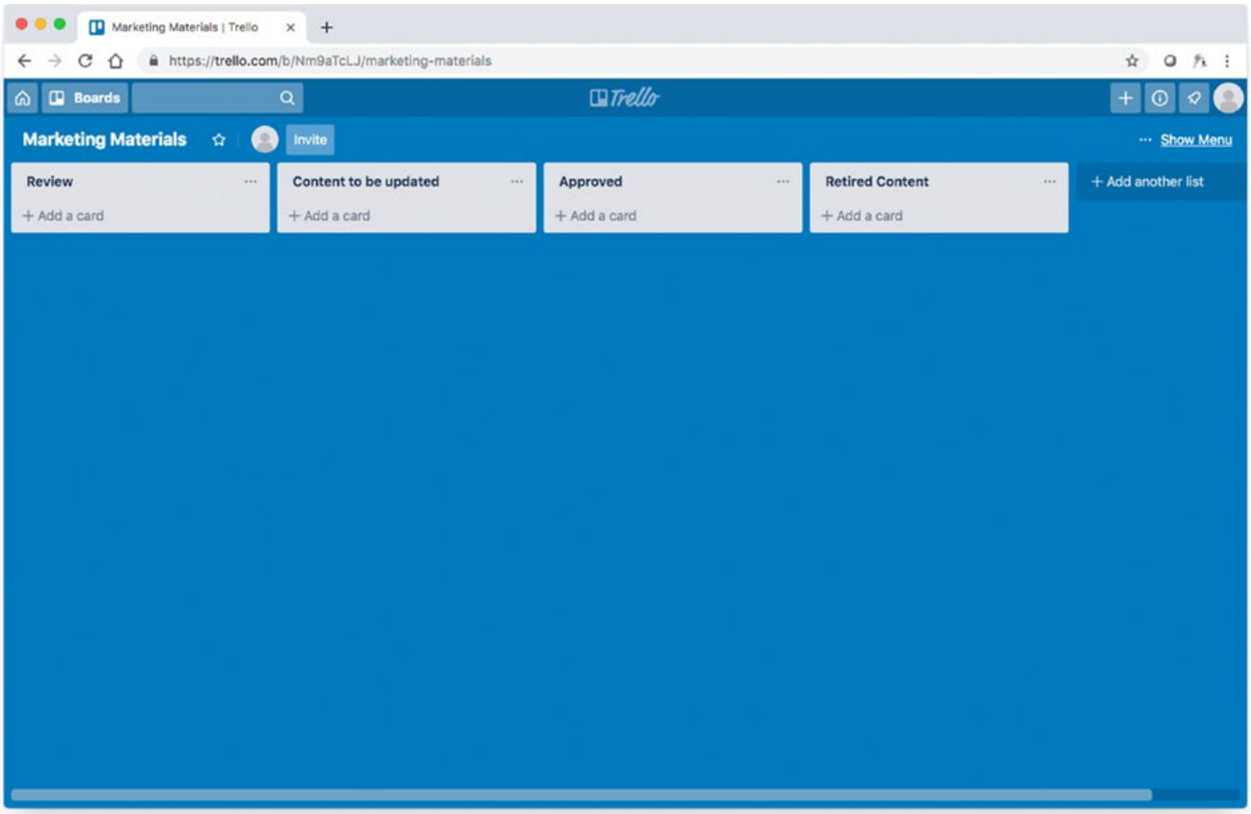
3. **Populate your workflow with lists (or column headings) that match the steps or process that your content needs to flow through in order to get from 'to do' to 'done'.**

   In the past we've included lists such as: Review Required, Content to be Updated, Approved, Image to be populated, add CTA, fix broken links, etcetera (you get the drift).

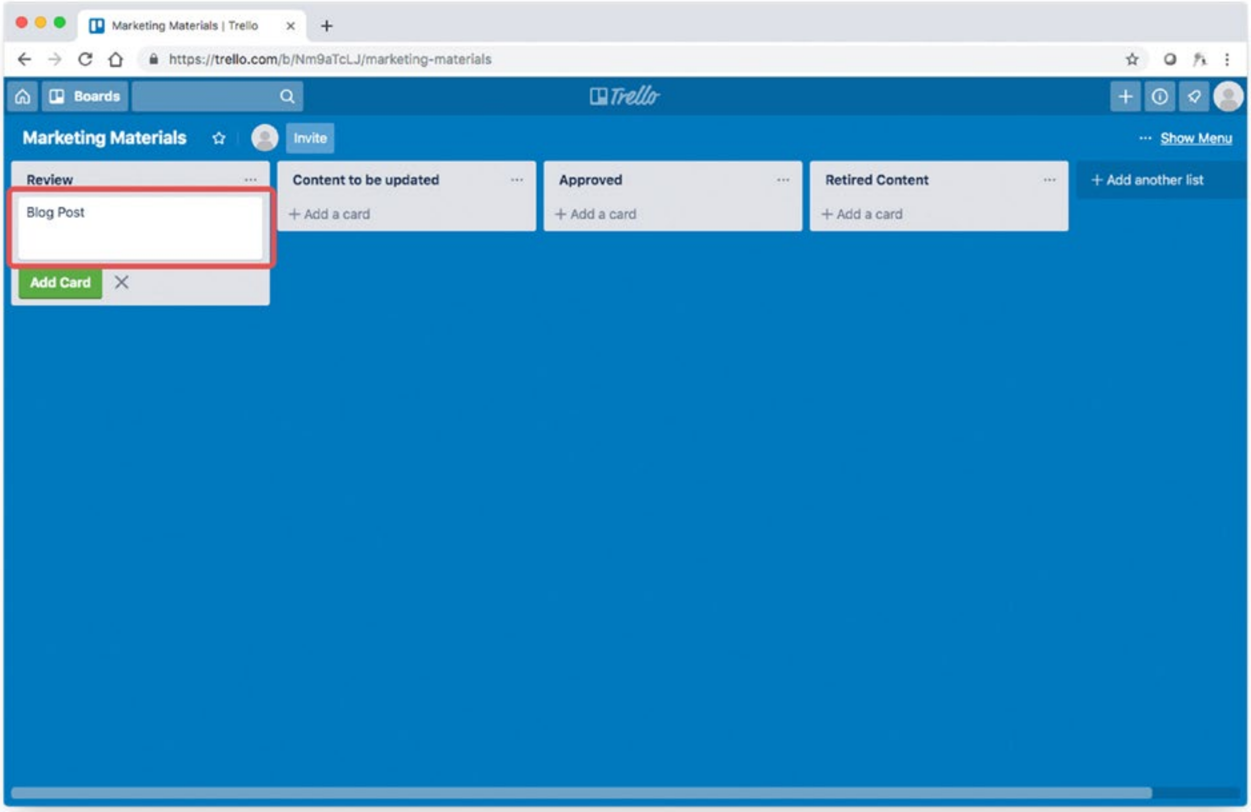
   If your goal is to eliminate old or underperforming content, create a list and name it something like 'To be removed' or 'To retire.'

   This is what this looks like for us:





4. **Now it's time to add your cards (or content tasks). To do this click below the list name and click add card.**



Each card should represent one piece of content. For example: a Blog post, a video, a newsletter… all of these should have their own card. (And while that's intuitive for some elements, if you're running a wider audit, don't forget things like contact forms and landing pages and the multitude of other pages and pieces of content that help deliver your digital experiences. Those need separate cards too.)

The title of the card should be the title of the content piece. Open up the card and you can add a link to where it's published on your site. This way people reviewing the card can click out to directly see the actual piece of content. Or add images to represent offline material.

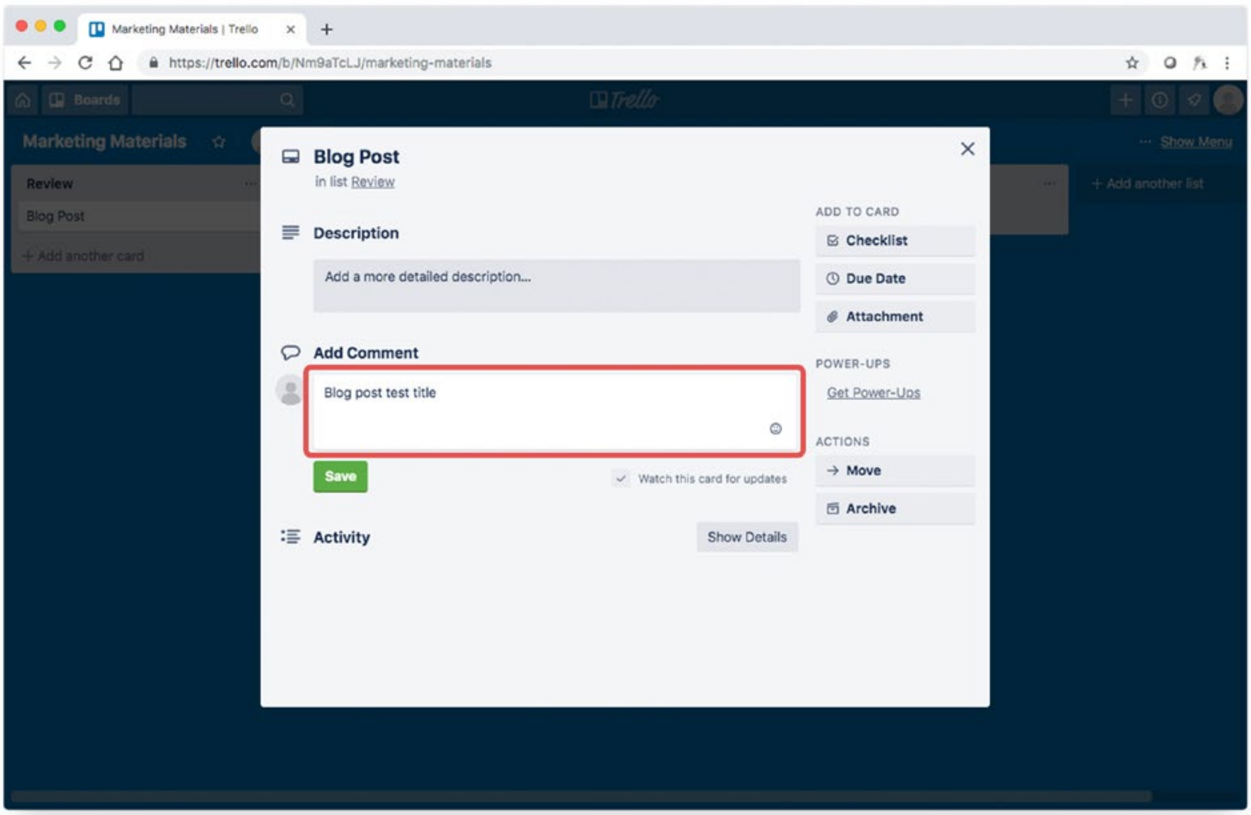
Just remember to make sure that each task is assigned to one card. This is essential for Kanban to work with Trello.

5. **You can assign tasks to team members to action. But you don't have to, it's entirely up to you.**

   Pure Kanban doesn't use task owners, although you can invite other collaborators to your board so they can follow the activity as it happens (such as project heads who might not be directly involved but want to observe or comment on the process). To invite a person to your board click the 'invite' button at the top of the board. Once they've joined the board, you can add them to the card/task you want to assign to them.

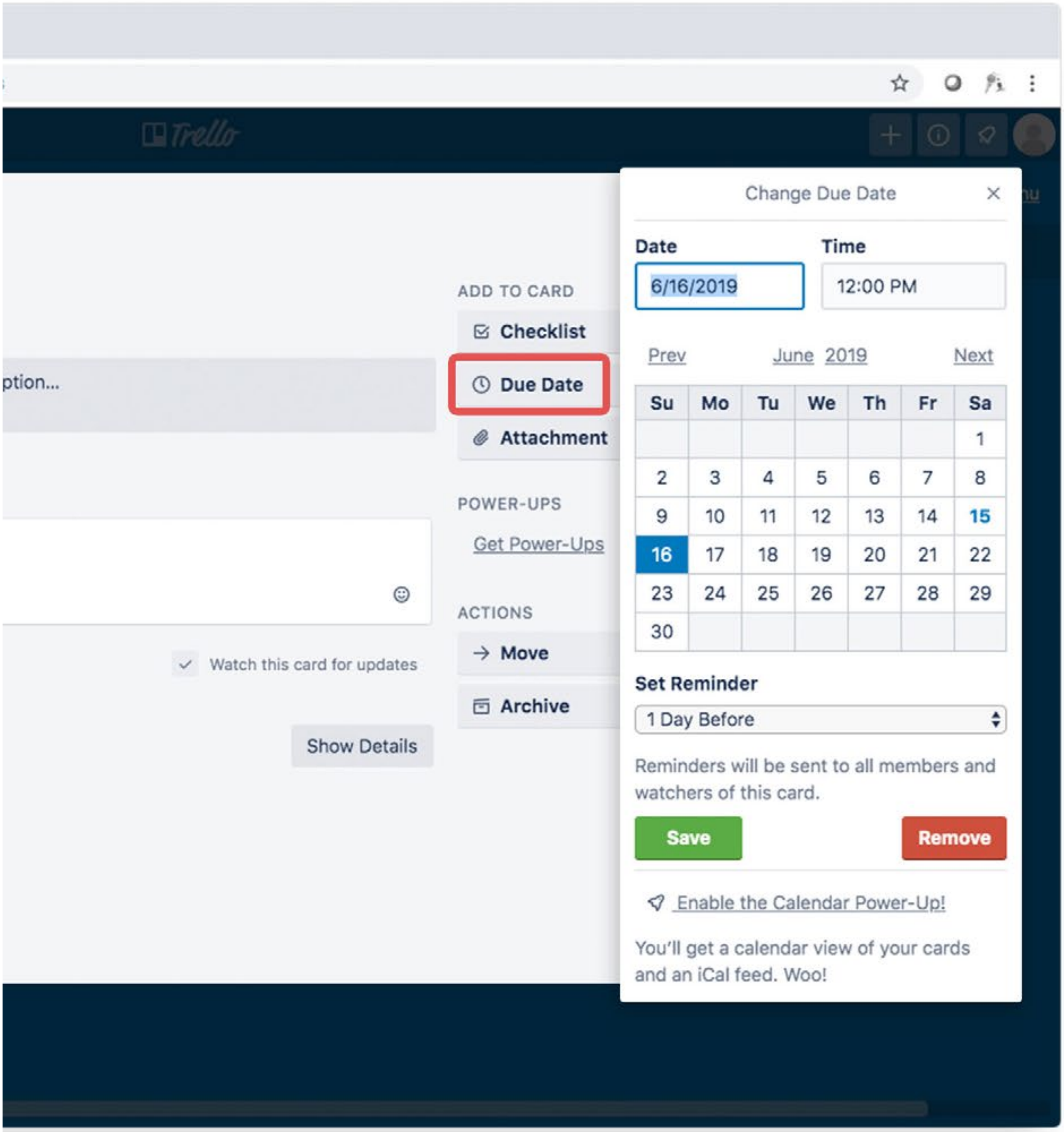
6. **Upon reviewing a piece of content, you can leave comments on the card as to why you're moving it to a particular column. For example, in the comments, you could write "old logo - needs to be updated" and then move it into the 'Update Needed" column.**

   Or you could tag (@) someone on your team asking them for their advice. Each card will show its history - so you can always see who moved what where and when. This helps you stay sane while looking at masses of content. It's good to be able to look back and get some context on why a card/piece of content has been moved to a particular column.



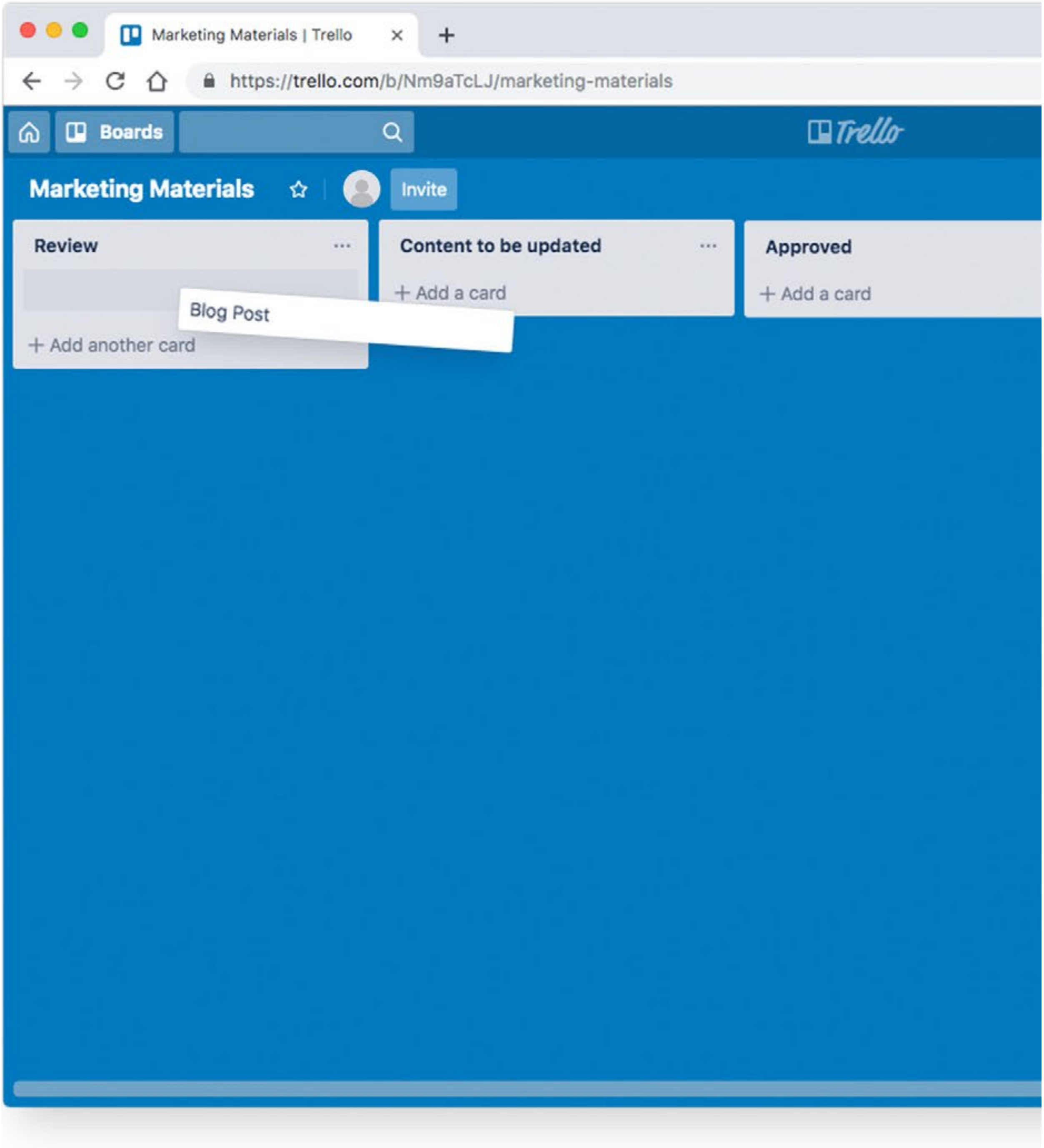
7. **With Kanban, one doesn't usually assign due dates. It's more about the constant flow of cards across the lists.**

But if your team works better with dates and deadlines, you can set the due date and time on the card. This allows Trello to send handy reminders to your members as the deadline approaches. To assign a due date, open a card and click the due date button on the right hand side, assign the date and save.



8. **Move cards across lists. Now each team member can follow the Kanban process to update the status of your tasks in Trello.**

   Simply put, just click and hold down on a card and drag it to the next list. This is how you manage the flow of content from one column to another until you've reviewed each piece of content, updated or repurposed it, redirected, retired or published it.



Sounds pretty darn awesome, doesn't it?

Now you know how Trello works for a content audit, in the spirit of full disclosure we have to mention some of its downsides, few as they might be.

- Trello was built with small businesses in mind, so it can get a little expensive if you have lots of users and need to integrate it with lots of other software.
- It can't automatically convert things to a Gantt view, which is often required when you need to report to committees and bosses. That's not to say it can't. Just that you'll need to integrate it with other software/plugins to do so.
- Then there's the fact that it's not deadline driven, probably because deadlines are the antithesis of the flow of continuous improvement that Kanban subscribes to. You can set due dates and the system will send reminders, but other tools may have better functionality to support a deadline based system.

As an agile project management tool for a content audits, Trello **gets our vote.**

If fun, visual, intuitive and easy are words you'd like to hear more of, **drop us a line.** We'll set up a free, 45-minute call to discuss how a content audit (using agile tools like Kanban and Trello) can simplify and amplify your digital marketing.