

Final National Example's DE Phase 1 Content Strategy Readout

Agenda

1. Vision & Overview
2. Content & Taxonomy Audit
3. Content Recommendations
 - Core Content Recommendations
 - Trade Marketing & Sponsored Content
4. Content Activation: Page-Level Content Strategies
5. Content Model
6. Taxonomy
7. Governance Model
 - Content Governance Structure
 - Content Lifecycle & Reviews
8. Editorial Guidelines
9. Next Steps

Operationalizing a content strategy

- 1** Inventoried client and intranet site content to surface content types
 - Classifies all content by type and serves as the basis for future evaluations
- 2** Model all of the elements within each content type
 - Prepares content recommendations and gap analysis
 - Defines digital structure to “liquefy” and create new content in the systems (CMS and DAM)
- 3** Create a taxonomy and tagging strategy
 - Enables tagging of content to support search, personalization, display, filtering, and reuse
- 4** Develop a metadata and tagging schema
 - Organizes metadata required for each asset to support use cases
- 5** Identify high-level content business process from authoring to archive
 - Surfaces functional gaps to support lifecycle
 - Ensures adherence to Editorial Guidelines and Voice & Tone
 - Guides reorganization to support content publishing
- 6** Design a governance model for the content lifecycle
 - Aligns organizational functions around content lifecycle
- 7** Define the criteria for content evaluation and optimization
 - Allows content decisions to be informed by business needs

Vision

CURRENT STATE

Product Data and Pricing

Online Ordering Catalog

Transactional Relationships

Top-Down Sales Organization



FUTURE STATE

Library of Dynamic Content

Marketplace for Suppliers and Customers

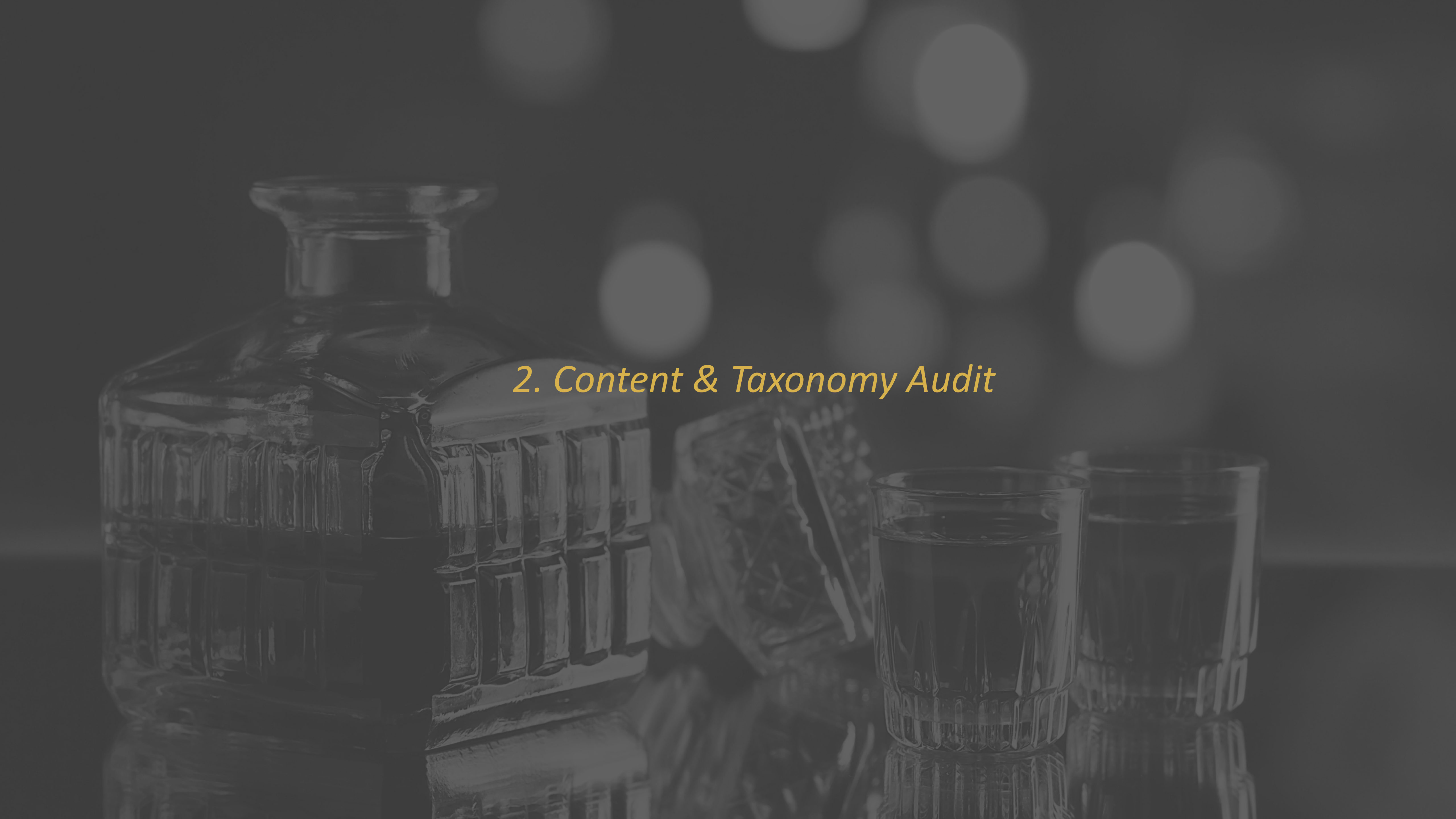
Trusted Resource for Industry Trends

Promotional Platform for Alcohol Brands

What we've completed – supporting documentation

DELIVERABLES & OTHER ARTIFACTS

- *Content Recommendations* – PDF
 - Content Recommendations – PDF
- *Conceptual Taxonomy*
 - Taxonomy Visualizations – PDF
 - Conceptual Content Model Taxonomy – PDF
 - Taxonomy Workbook – Excel Workbook
- *Conceptual Content Model*
 - Conceptual Content Model Taxonomy – PDF
 - Content Model Diagrams – PDF
 - Content Model – Excel Workbook
- *Supplier Portal Audit*
 - Supplier Portal Audit –Excel Workbook
- *Governance Model*
 - Final Phase 1 Content Strategy Readout – PDF
- *Editorial Guidelines*
 - Editorial Guidelines – PDF
- *Content Activation Strategy*
 - Final Phase 1 Content Strategy Readout– PDF

A dark, moody photograph of a crystal decanter and two glasses, with the text "2. Content & Taxonomy Audit" overlaid in a yellow font. The decanter is on the left, and the glasses are on the right. The background is dark and out of focus.

2. Content & Taxonomy Audit

Operationalizing a content strategy – 1

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What we reviewed

SITES

- National Example Corporate Site
- Our Wine Online
- Item Registry Portal
- Third-Party Sources
- Competitive Sites
 - Drizly
 - Caskers
 - Wine.com
 - The Whiskey Exchange
 - Tasting Panel
 - Seven Fifty Newsletter

OTHER ARTIFACTS

- PIM Field List
- Item Registry User Template and Taxonomy
- Product – Item Data Model
- Las Vegas Newsletters
- Pricing Books Online

What we observed – product/item metadata

- List of 100+ fields in PIM, 85 of which provided by suppliers via item registry
- Provides product attributes in key data categories such as:
 - Product/Item Details
 - Pricing
 - Marketing Classification/Descriptors
 - Packaging
 - Logistics

Item Registry Upload Template FIELD DETAILS					
Sheet	Column	Field Name	Field Description	Required	Field Type
PIM_LAYOUT	A	Item No	This is the unique key that will be used to identify your item in the SGWS Supplier Portal. A new Item Number will generate a new Item for your Catalog. An existing Item Number will update the Item in your Catalog.	Y	Text
PIM_LAYOUT	B	Supplier Product Number	The Supplier Product Number is an internal number or code your company uses to identify the product.		Text
PIM_LAYOUT	C	Supplier Item Description	Enter the Supplier Item Description in this text field that is as complete as space allows. Any reasonably knowledgeable individual should be able to read this description and know exactly what the item is called. The Supplier Item Description should match what is printed on the label as closely as possible.	Y	Text
PIM_LAYOUT	D	Label Brand	Enter the Label Brand for your item here. If the brand is new to your portfolio, please enter this in the Requested Label Brand field. One of Label Brand and Requested Label Brand must be populated.	Y	Text
PIM_LAYOUT	E	Requested Label Brand	If this brand is a new brand for your portfolio, enter the Brand Name here.		Text
PIM_LAYOUT	F	Producer	Enter the name of the Producer of the item as stated on the label. If the Producer is new to your portfolio, please enter NA - Not Applicable in this field.	Y	Text
PIM_LAYOUT	G	Proprietary/Fanciful Name	If applicable, enter any fanciful or proprietary names used on the label.		Text
PIM_LAYOUT	H	Category	The Category is a broad grouping into which the product falls. Please select the most appropriate Category for your item.	Y	LOV
PIM_LAYOUT	I	Class	A Class is a more specific definition of the product. Select the available option that best relates to the product.	Y	LOV

What we observed – product categorization hierarchies

- **Product Categories**

- CATEGORY → CLASS → SUB-CLASS → VARIETAL (*if category = wine OR material = grape*)

- **Item**

- PRODUCT (*Tier 1, Product Family w/ shared attributes*) → ITEM (*Tier 2, Sellable Unit*)

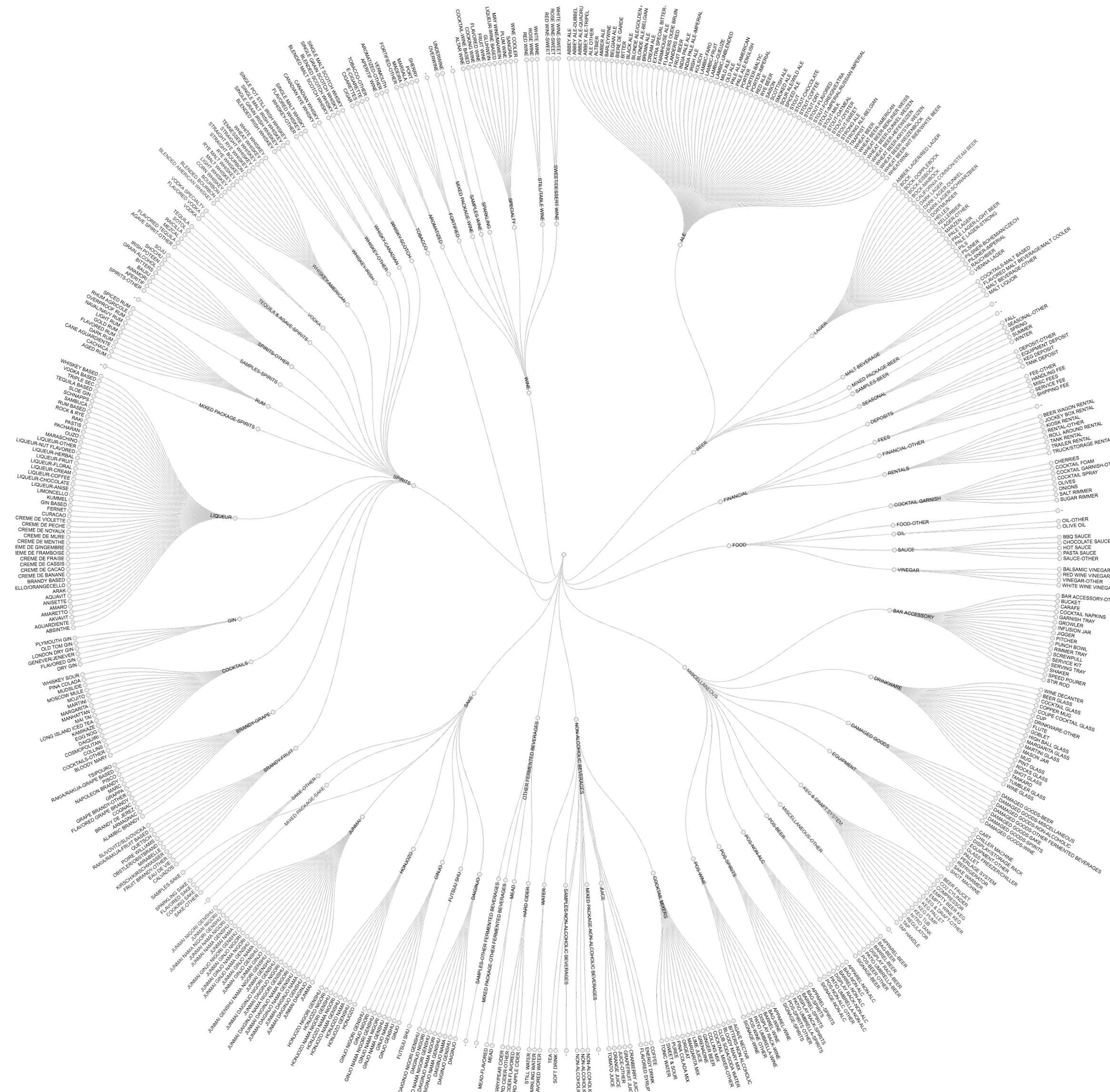
- **Geography**

- COUNTRY OF ORIGIN → REGION (state, province, etc.) → SUB-REGION → APPELLATION → VINEYARD (*mainly applies to wine*)

- **Packaging**

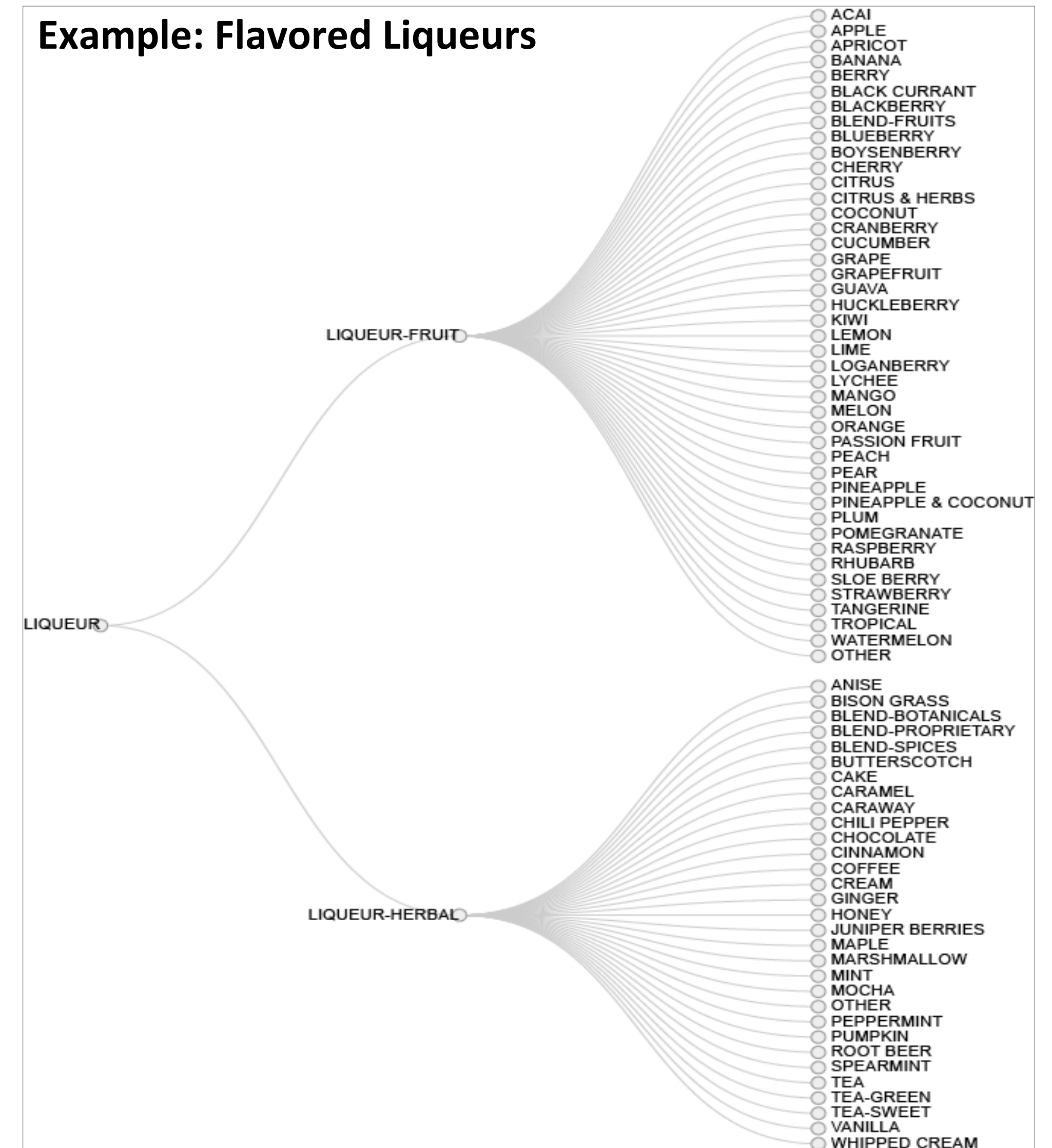
- PALLET → CASE → INNER PACK → BASE UNIT (*bottle*)

What we observed – controlled values



What we observed – controlled values

- PIM features 40 attribute categories with controlled value lists some of which are unique a specific category and some are universal
- For specific marketing classification categories, these controlled values are individually mapped to the primary product categorization. Categories include:
 - Flavor
 - Color
 - Material/Sub-Material
 - Varietal
- This can be leveraged for advanced or faceted search opportunities within an experience
 - Example: customer browses for fruit liqueurs but isn't sure which flavors are available



Review of potential third-party content sources

SOURCES

- Robert Parker Wine Advocate
 - Ratings/Reviews
 - Vintage Chart
- Whisky Advocate
 - Ratings/Reviews
 - Whisky 101 – Instant Expert
- Wine Spectator
 - Ratings/Reviews
 - Vintage Charts
- Wine and Spirits Magazine
 - Reviews/Ratings
 - Tasting Notes
 - Recipes
- Tasting Panel
 - Reviews
 - Recipes
 - Features

INTEGRATION OPTIONS

- Manual
- Automated via XML RSS Feeds/API
- Automated w/ MDM storage

NOTE: We have to anticipate the possibility of a popular wine having up to 3 – 4 different reviews/tasting notes attached to it and allow for that flexibility in the UI

Key gaps & opportunities

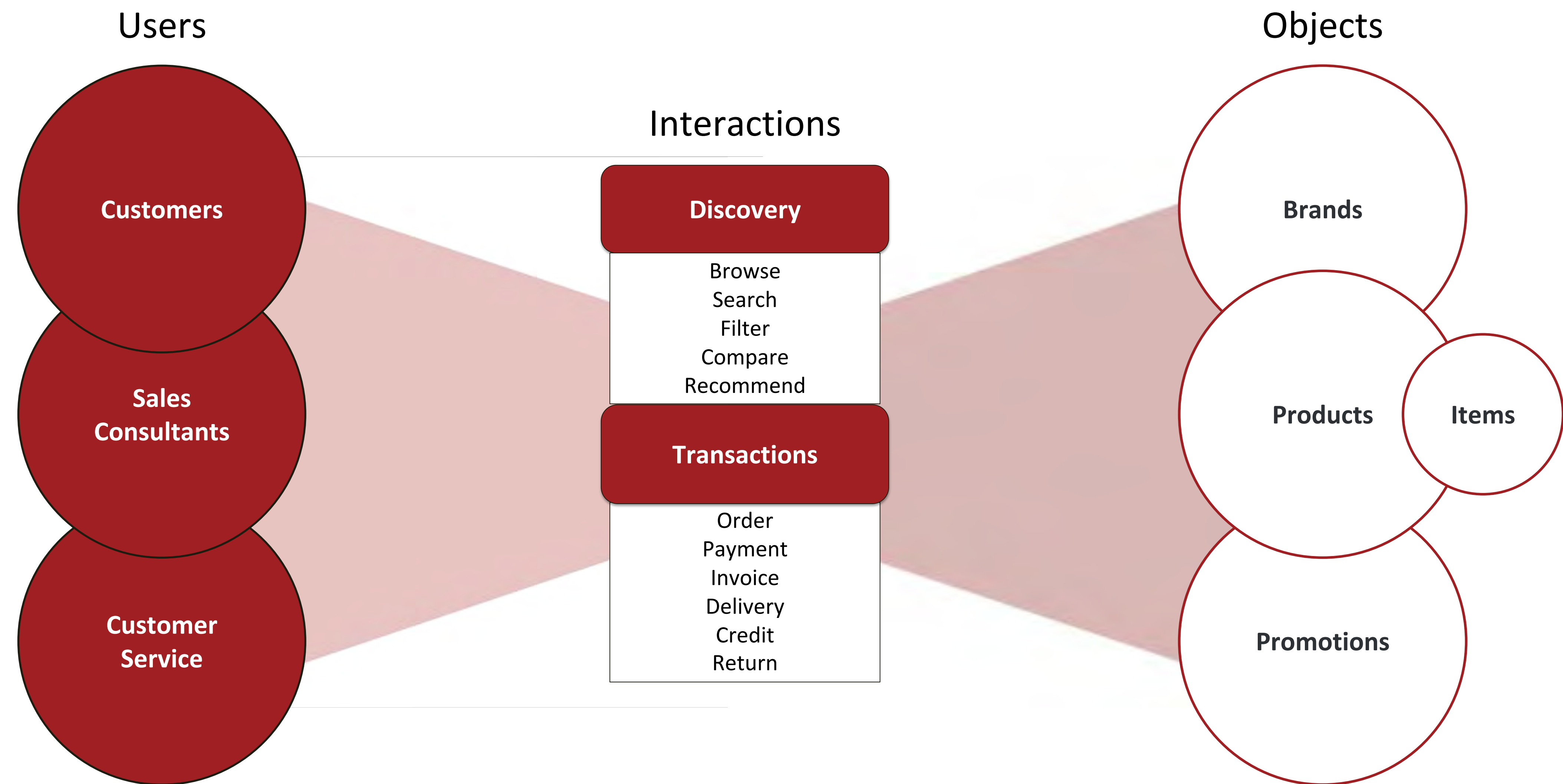
- PIM does not contain all the necessary user-facing content to support full e-commerce experience (long description, tasting notes, ratings/reviews, etc.). This information needs to be defined or sourced from third parties and/or suppliers
- Taxonomy needs to extend beyond just product categorization/classification:
 - Brand Taxonomy
 - Customer Taxonomy
 - Sales Taxonomy
- Content relationships need to be defined to understand cross-selling and deep-linking opportunities via connected via taxonomy
- Approach for any potential assets other than product assets such as banners, product family shots, etc., need to be defined:
 - Whether this is required for the experience
 - Whether these assets live in DAM or CMS Media Library

Operationalizing a content strategy: 2

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Core Content Recommendations

National Example's e-commerce content ecosystem



National Example's content marketing initiatives



Product detail content exploration



Primary Product Details

- Name
- Description
- Product Images
- Category – Class – Subclass
- Supplier – Brand*
- ABV/Proof
- Flavor
- Base Unit Type
- Country of Origin – Region
- Availability/Delivery Options
- Packaging Options (see item)
-

Marketing Descriptors

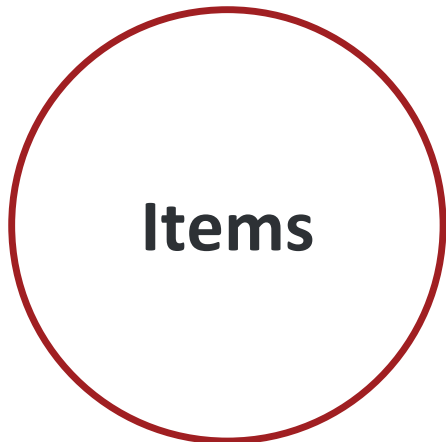
- Tasting Notes/Flavor Profiles
- Ratings/Reviews
- Recipes/Serving Guides*
- Food Pairings
- Promotions*
- Discount Codes
- Brand Info – Banner, Ads, etc.
- ...

Related Products

- Related Products
- Products in Same Category
 - Products in Same Geo
 - Products in Same Brand
- Complimentary Products
- Products in Different Category
- Recommended Products
- Customer Recs*
 - Sales Recs*
 - Best Seller Recs*

Search/Filter Facets:

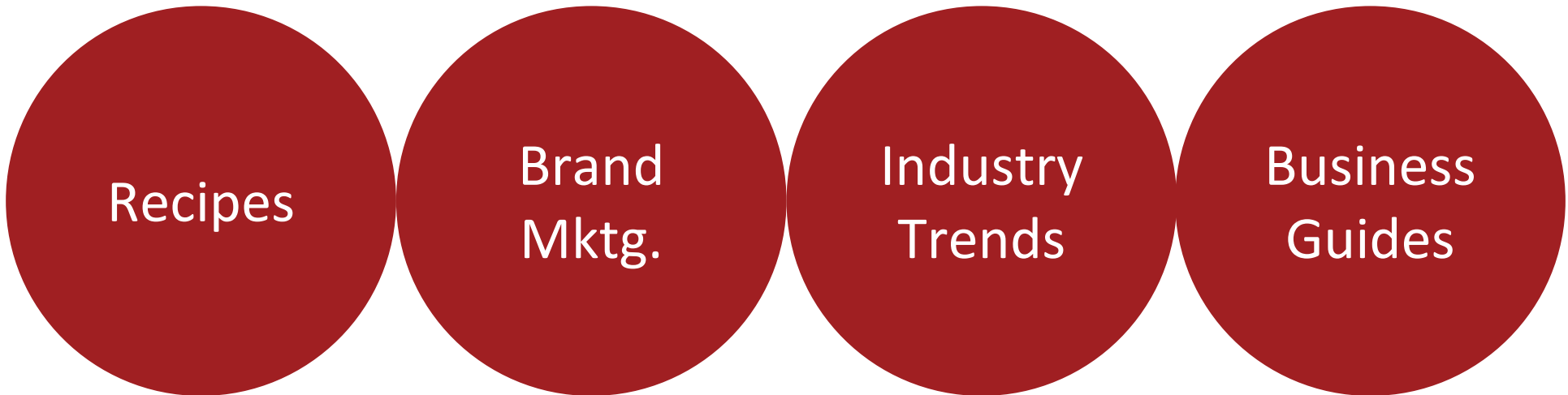
- Category
- Region
- Brand (Distillery, Vineyard)*
- Price (bottle, case)
- Rating
- Size/Packaging
- Age/Vintage



Item Details

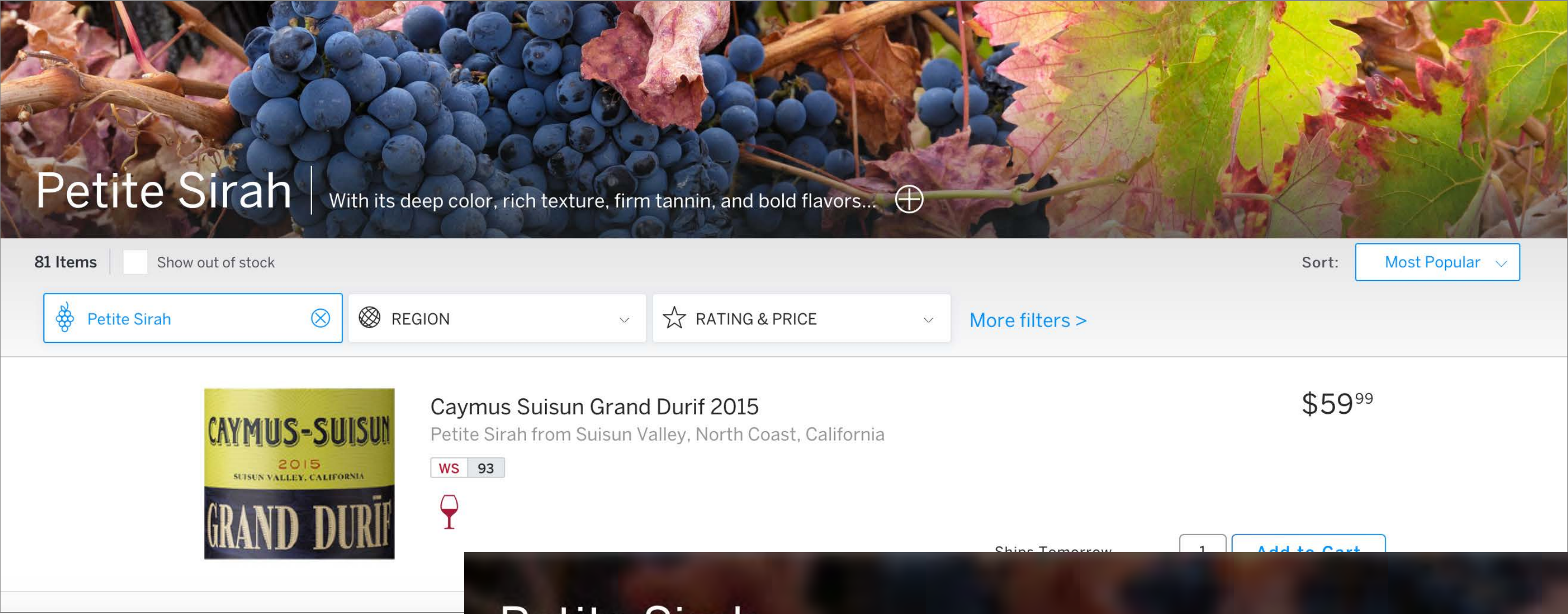
- Price (Per Bottle, Per Case)
- Size
- Item Availability
- Item Packing Unit Details
- ...

Content Marketing Areas



* denotes a relationship to a potential content type or filter

Product content opportunity: category overview



Wine.com offers content around the specific wine varietal that a user chooses. This includes a banner image, description, and a group of wine characteristics.

This content may open customer eyes to underrepresented varietals.

Petite Sirah

With its deep color, rich texture, firm tannin, and bold flavors, there is nothing petite about Petite Sirah. The variety was originally known as Durif, but took on its more popular moniker when it was imported to California from France in 1884. Despite its origins, it has since become known as a quintessentially Californian grape. It has been commonly utilized as a blending partner for softer Zinfandel and other varieties, but has also found success as a single varietal wine. It is most commonly grown in [Lodi](#) and the Central Valley, and to an extent in [Sonoma](#) and [Napa](#) counties.

In the Glass
Petite Sirah wines are typically deep, dark, rich, and inky, with concentrated flavors of blueberry, plum, blackberry, black pepper, sweet baking spice, leather, and cigar box, and chewy, chocolatey tannins. Notes of vanilla and coconut can be found in examples with significant amounts of new oak.

Perfect Pairings
Petite Sirah's full body and bold fruit make it an ideal match for barbecue, especially brisket with a slightly sweet sauce, and other rich meat dishes. The variety's heavy tannins call for fatty protein and strong flavors that won't get drowned out by the wine.

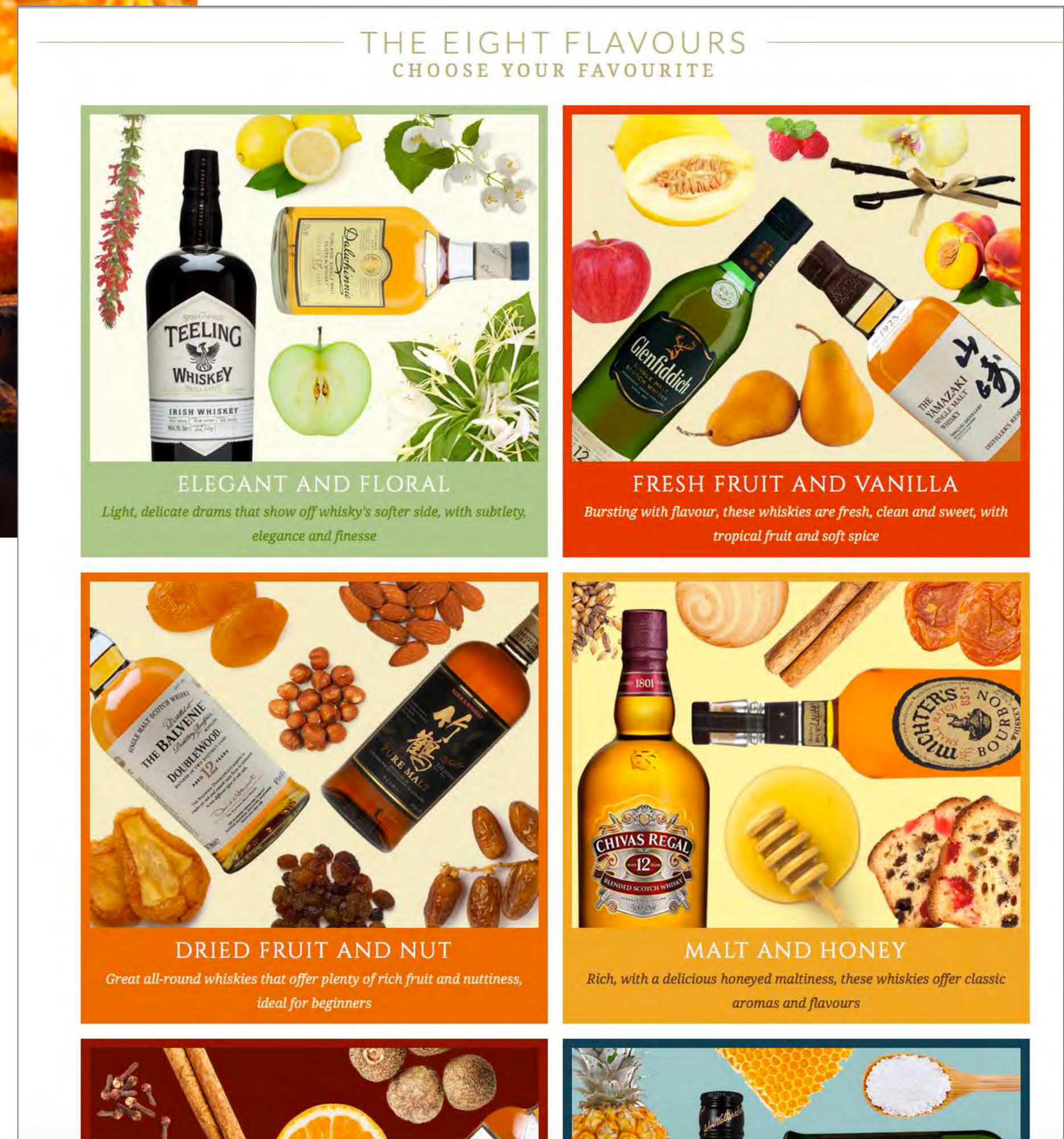
Sommelier Secret
Don't get Petite Sirah confused with Syrah—it is not, as the name might seem to imply, a smaller version of Syrah. It is, however, the offspring of Syrah (crossed with an obscure French variety called Peloursin), so the two grapes do share some characteristics despite being completely distinct varieties.

Product content opportunity: browse/search by flavor



The Whisky Exchange allows users to search and filter whisky by flavor. This section also features guides and imagery to help consumers identify their own flavor profile.

This is an example of how to build useful content that supports a particular faceted navigation scheme. We need to think about the available attributes and whether or not there is an opportunity to develop content that helps a user understand and make a purchase.



Product content opportunity: popular/recommended products

National Example's
Top Picks for You

Top Picks



Bulleit Bourbon
\$19.99 - \$51.99



Baileys Irish Cream Original
\$15.99 - \$44.99



19 Crimes Red Blend
\$7.14 - \$22.09



Tito's Handmade Vodka
\$9.99 - \$37.09

Popular –
Purchase Data

Trending Now



Veuve Clicquot Brut Yellow Label
\$39.60 - \$99.99



Johnnie Walker Blue Label
\$149.99 - \$314.99



Moët & Chandon Imperial Brut
Champagne
\$37.98 - \$82.99



Hennessy V.S Cognac
\$27.99 - \$69.99

Online alcohol distributor and delivery service, Drizly has homepage modules that feature top picks and trending items.

This could be a huge differentiator for National Example's considering the large amount of purchasing data that can be leveraged as well as the sales force of consultants who are equipped to make strategic, customized recommendations.

Product content opportunity: recipes with featured products

Try These Bulleit Recipes



BLT

bourbon

Step aside, vodka and gin—this Bulleit BLT is the new go-to summer drink. You may associate tonic water with vodka or gin, but what about bourbon? This golden alternative is just as simple and light for summer.

[Read More >](#)



Bulleit Boilermaker

beer

Go old-school with Bulleit's take on the classic whiskey and beer drink.

[Read More >](#)



Bulleit Old Fashioned

bourbon

It doesn't get much more classic than the Old Fashioned. This timeless drink is a staple for any mixologist or home bartender!



Rye Manhattan

rye whiskey

An important staple in your bartending arsenal, the Manhattan is a classic cocktail traditionally made with Rye Whiskey.

Drizly / Recipes



Bulleit Old Fashioned

by Bulleit

FEATURED

Bulleit Bourbon

Shop Now

bourbon

classic

★★★★★

Write a review

Level:

Medium

Prep:

5 min

It doesn't get much more classic than the Old Fashioned. This timeless drink is a staple for any mixologist or home bartender!

Ingredients

Tools

How to Mix

✓ 1 oz Bulleit Bourbon

✓ 1/4 oz Bitters

✓ 1 oz Sugar

✓ 1 splash of Water

✓ Lemon Slice

✓ Orange Slice

Old fashioned

Jigger

Muddler

1. In a rocks glass, muddle sugar and bitters

2. Add bourbon, water, and a large ice cube

3. Twist slices of lemon and orange peel over the drink and drop the slices in

4. Garnish with a cherry

Shop Ingredients



Bulleit Bourbon

\$19.99 - \$51.99



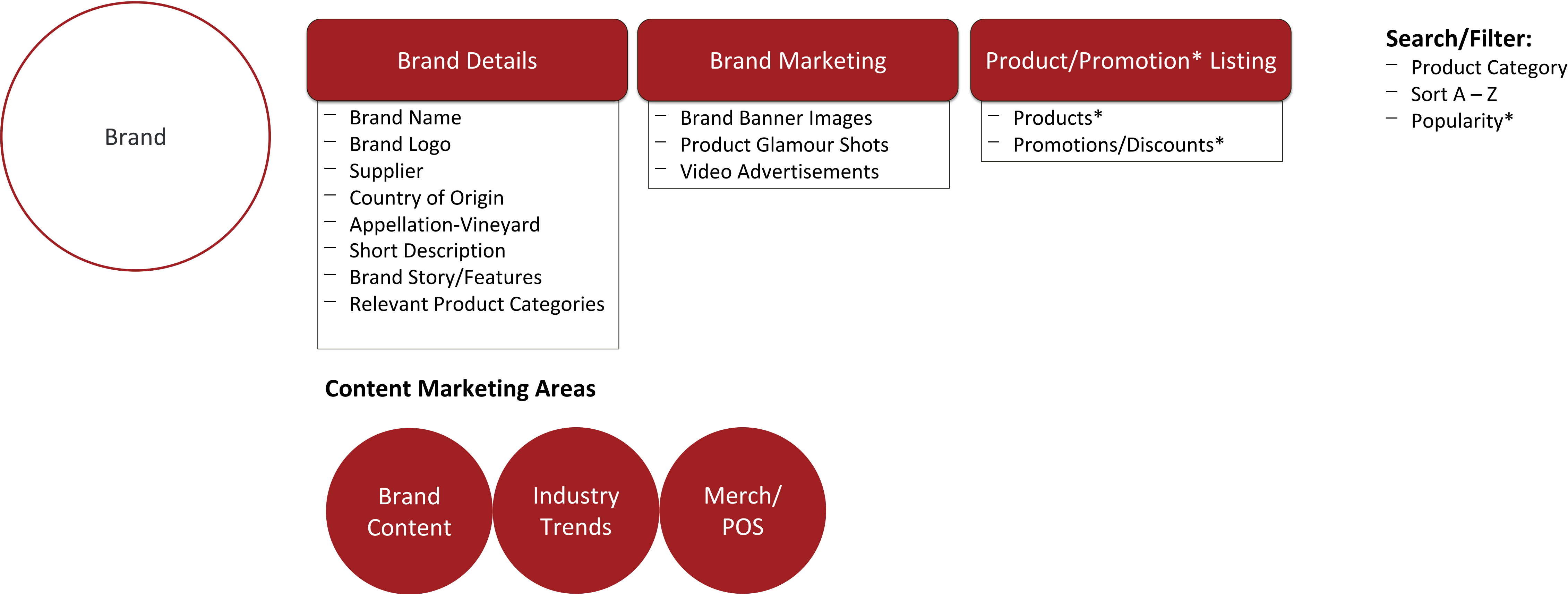
Angostura Bitters

\$5.99 - \$34.99

Drizly features recipes on their product pages. These recipes are provided by the supplier and highlight a specific product. It also links back to the shopping experience with a “Shop Ingredients” module.

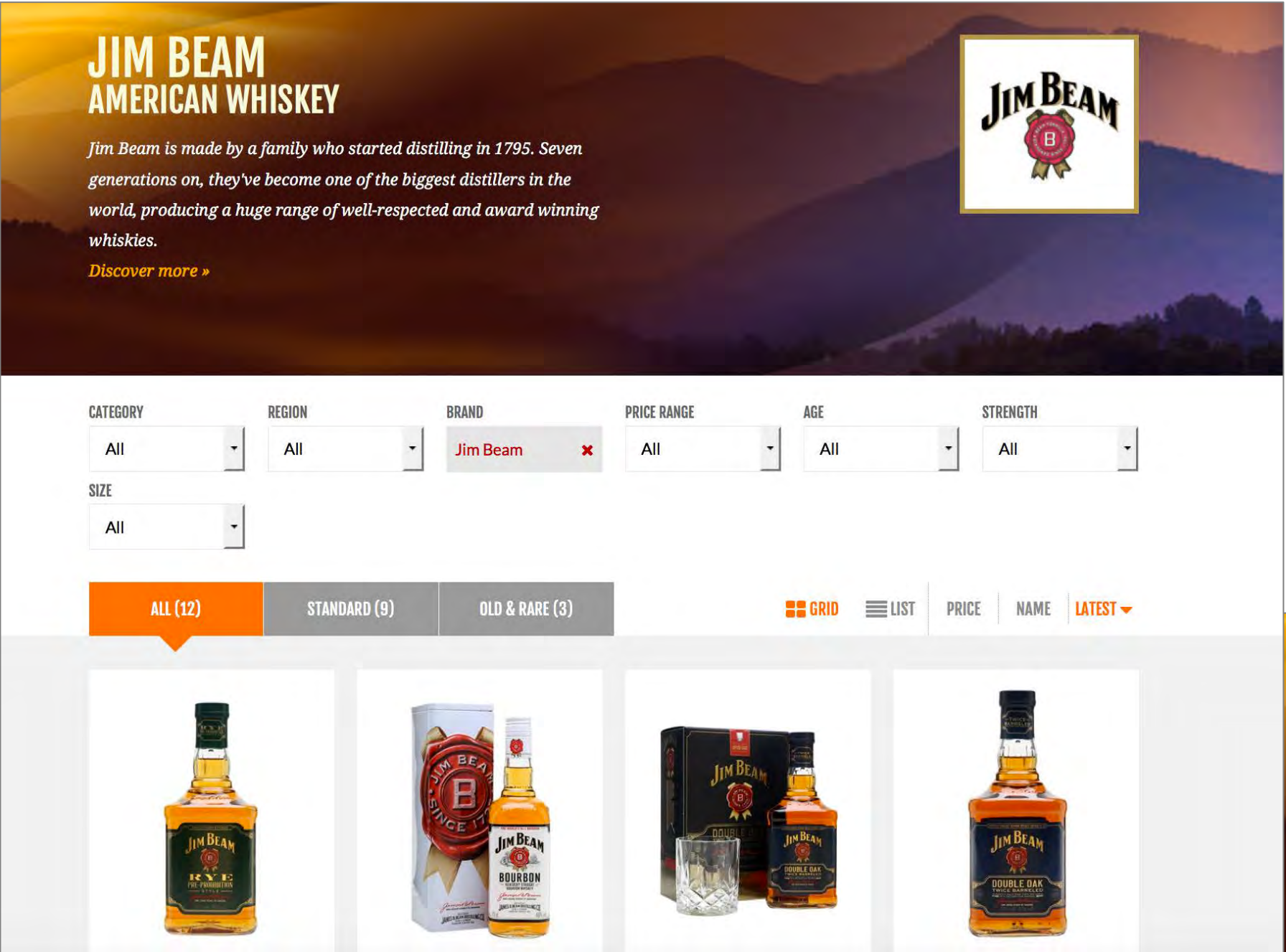
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Brand detail content exploration



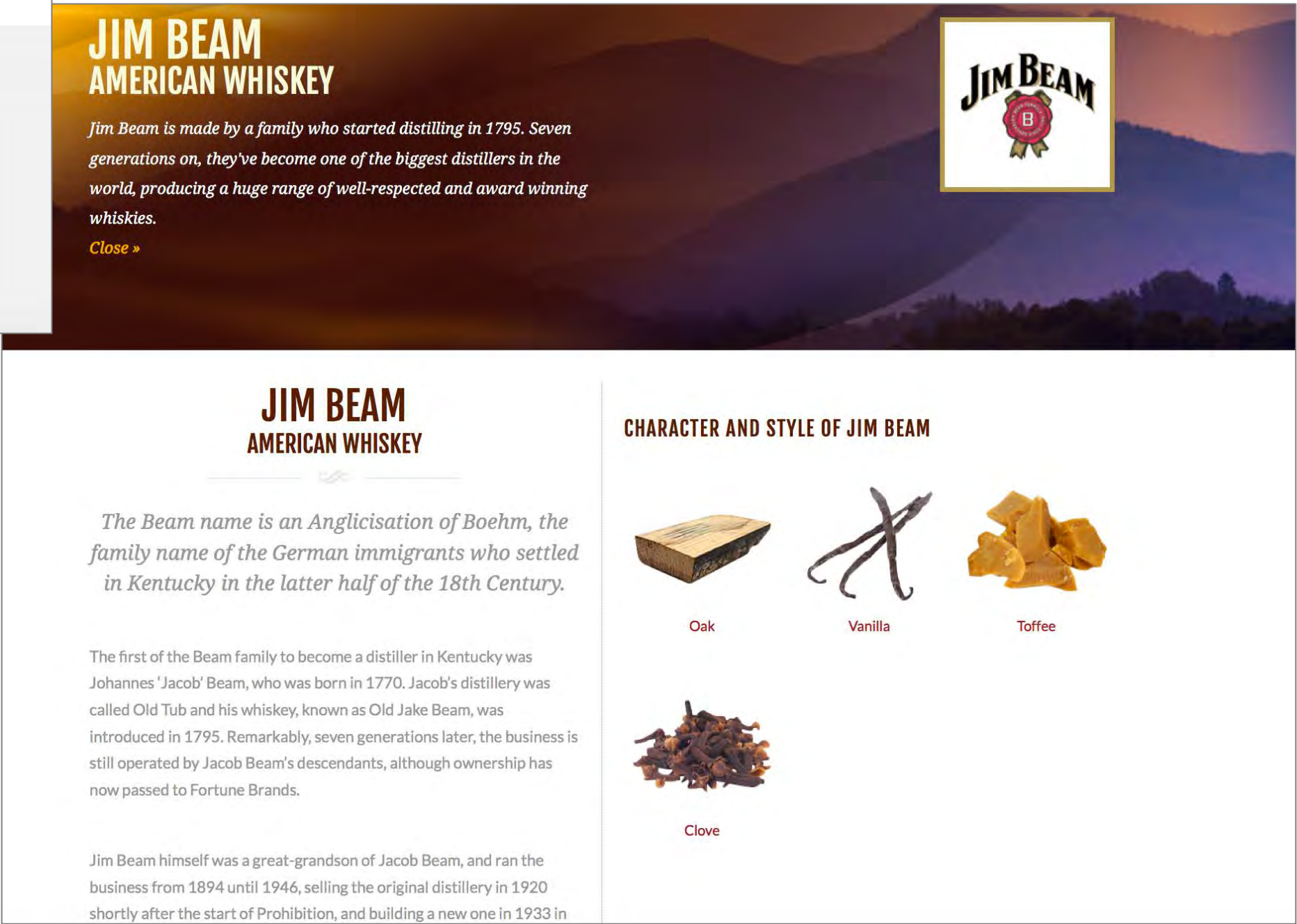
* denotes a relationship to a potential content type or filter

Brand content opportunity: brand landing page

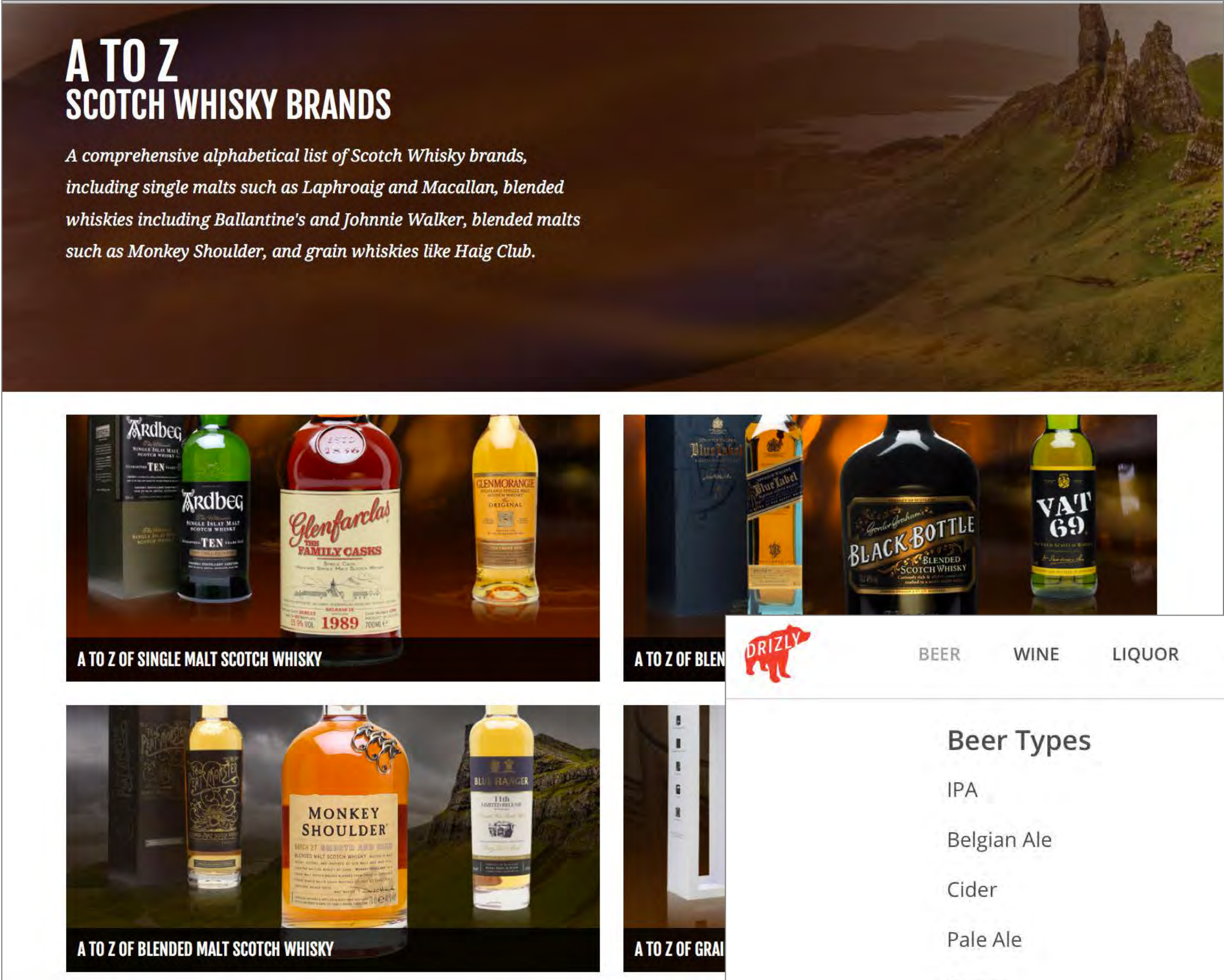


The Whiskey Exchange features brand landing pages that display all of the products associated with that brand. It also features the descriptive background and history that helps inform customers of the brand’s story.

Not only does this proposition help the customer discover new information about the brands they purchase, it also helps position brands and their associated products on the platform.



Brand content opportunity: brand search/discovery



It is also helpful for users to be able to search brands as an object itself. Whiskey Exchange allows users to search for brands A-Z with a breakdown for each category.

Drizly and Wine.com feature a Top Brands designation in the navigation to help route people to products they want to sell. This could be a major opportunity to align supplier and user goals.



[BEER](#) [WINE](#) [LIQUOR](#) [EXTRAS](#) [RECIPES](#)

Beer Types

IPA

Belgian Ale

Cider

Pale Ale

Porter

Amber Ale

Wheat

Seasonal

Stout

Pilsner

Sour Ale

Hefeweizen

[View All >>](#)

Top Brands

Bud Light

Stella Artois

Corona

Lagunitas

Dogfish Head

Angry Orchard

[View All Beer Brands >>](#)

Countries

United States

Germany

Ireland

Mexico

Japan

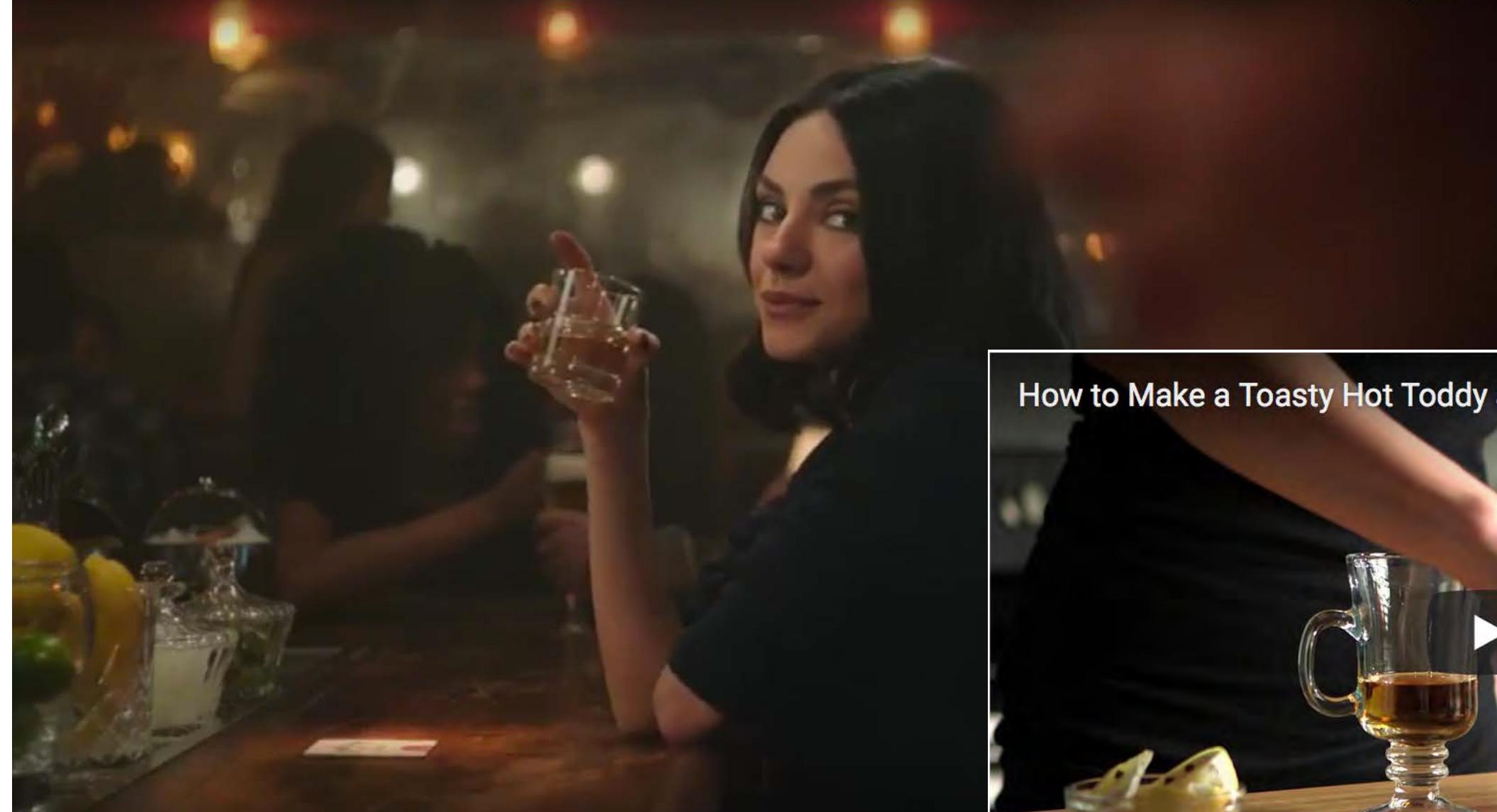
Belgium

[View All >>](#)

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Brand content opportunity: brand videos

Jim Beam® | Mila Kunis "Invitation" TV Commercial



How to Make a Toasty Hot Toddy at Home



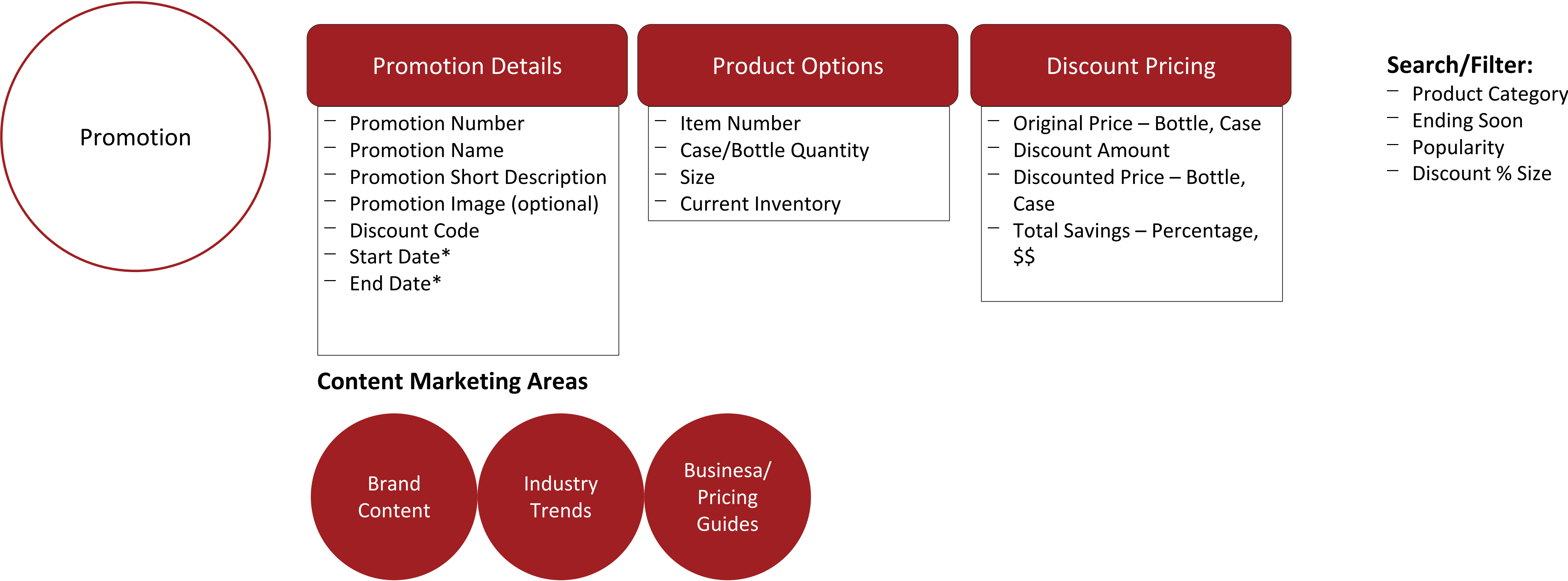
How to Make an Easy Old Fashioned with Bulleit Bourbo...



Incorporating brand videos into the experience is also a possibility considering some of the suppliers you work with are already pushing this content on other channels.

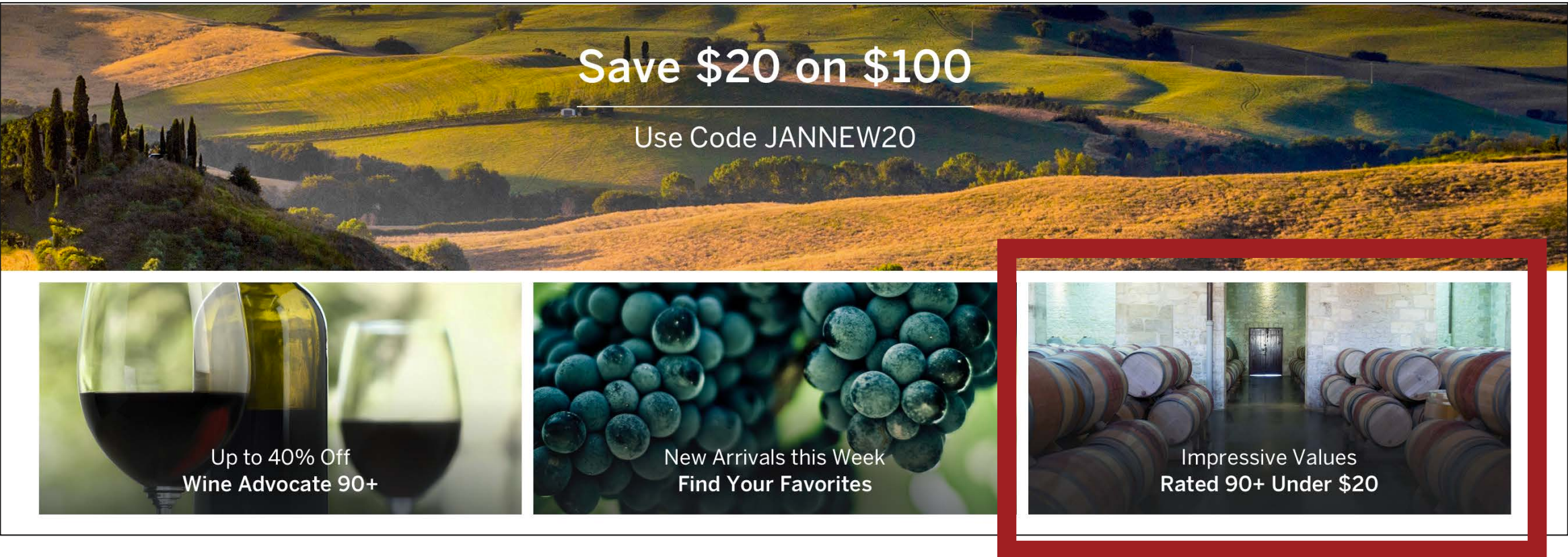
Even if the video is a commercial, in the experience, it would work as additional product content which the user can choose to engage with or not.

Promotion detail content exploration



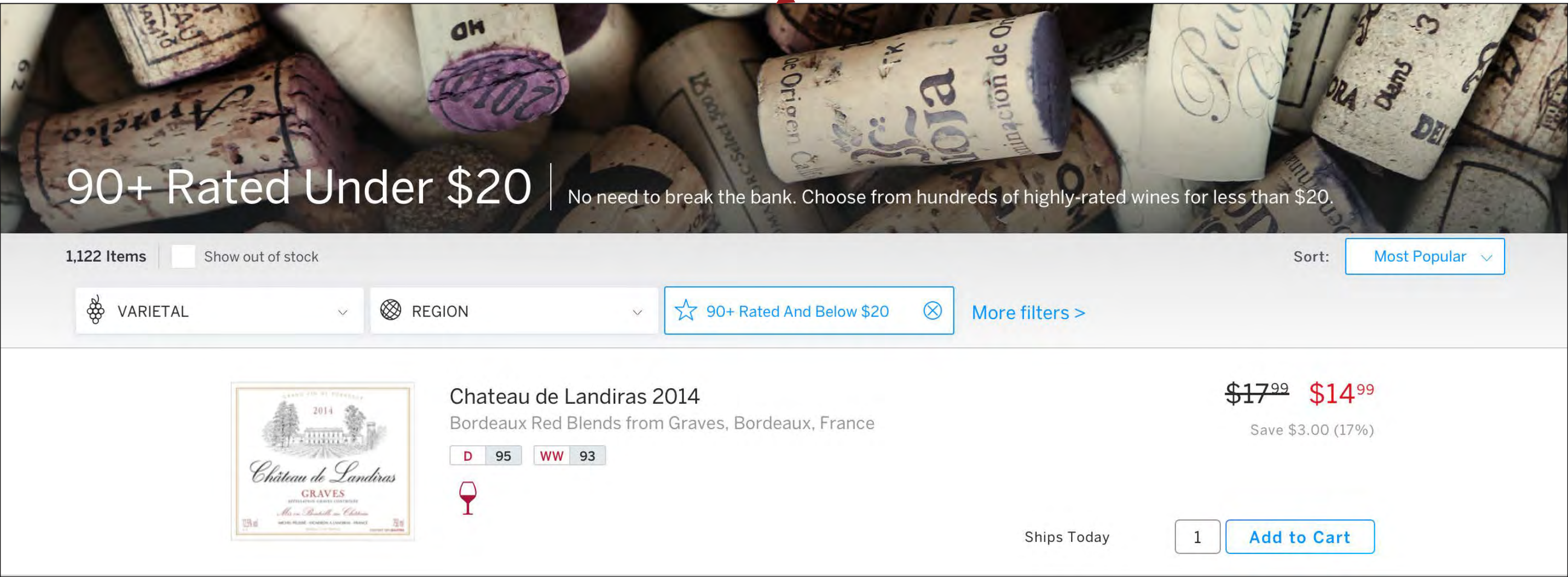
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Promotion content opportunity: highlighted promotions/deals



Wine.com uses tiles on their homepage to highlight great deals and promotions. This promotion leads to a product listing page that shows price cuts as well as the total/percentage saved on specific items.

This could be a great way to present enticing bulk sales and discounts.



Promotion content opportunity: promotion labels

FEATURED  SELECTION
CLICK TO SEE ALL OF OUR SPIRITS

⌚ SALE ENDS *in 2 DAYS*



OBAN LITTLE BAY SINGLE MALT
SCOTCH WHISKY

\$86.99

⌚ SALE ENDS *in 2 DAYS*



THE MACALLAN 15 YEARS OLD
FINE OAK SCOTCH SINGLE MALT
WHISKY

\$149.99

⌚ SALE ENDS *in 10 DAYS*



TOMATIN 12 YEAR OLD CUATRO
MANZANILLA SHERRY CASK
FINISH SINGLE MALT SCO...

\$89.99

⌚ SALE ENDS *in 2 DAYS*



QUIET MAN 8 YEAR OLD SINGLE
MALT IRISH WHISKEY

\$53.99

Cask.com features labels on their products to indicate when the sales end. This entices users to click on the item and drives their behavior to purchase before the sale ends.

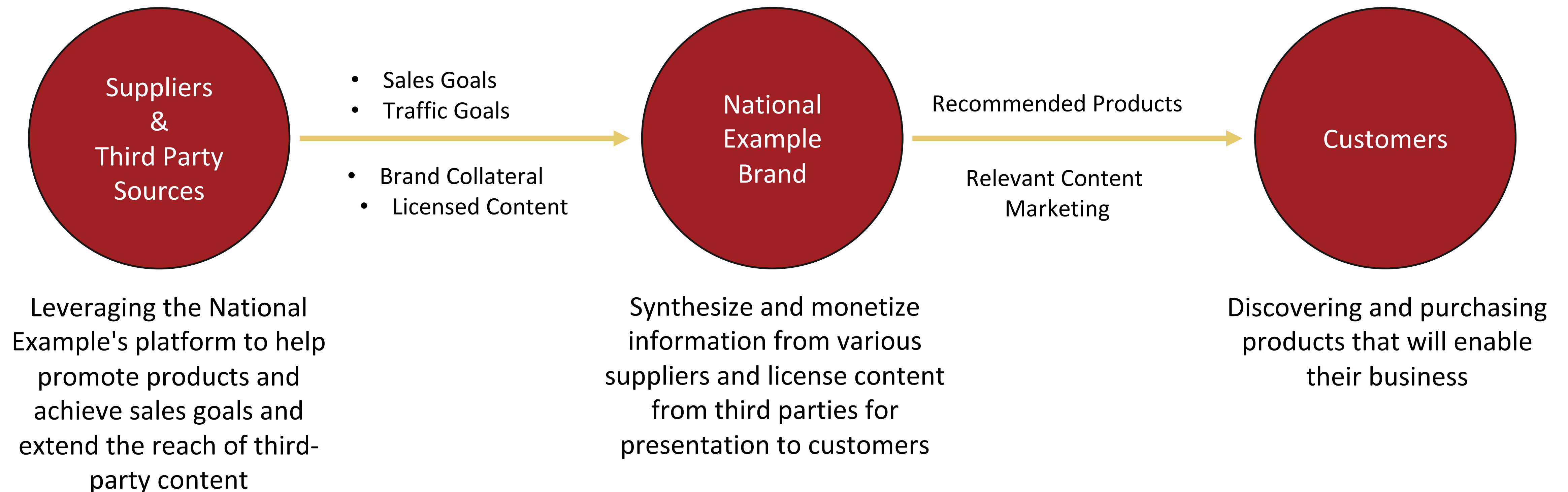
Initial content prioritization matrix

Content Type	Exists in Current State?	Source	Strategic Priority	Effort
Product Details/Pricing	Yes	Client	TIER 1	MEDIUM
Product Imagery	Spring 2018	Client	TIER 1	HIGH
Reviews and Ratings	No	3 rd Party, Users	TIER 1	MEDIUM
Tasting Notes	No	3 rd Party, Suppliers	TIER 1	MEDIUM
Customer Purchasing History/Data	Yes	Client	TIER 1	HIGH
Flavor Profiles	No	3 rd Party, Suppliers	TIER 2	MEDIUM
Food Pairings	No	3 rd Party, Suppliers	TIER 2	MEDIUM
Recipes	No	3 rd Party	TIER 2	MEDIUM
Promotions	Yes	Client, Suppliers	TIER 2	MEDIUM
Brand Marketing (Banners, Advertisements, Merchandising, Sales)	No	Suppliers	TIER 2	MEDIUM
Pricing Guides	Yes	Client	TIER 2	LOW
Product Notifications/Release Calendar	No	Client, 3 rd Party	TIER 3	MEDIUM
Industry Trends (Popularity, Geography, Seasonal)	No	Client	TIER 3	HIGH
Local/Industry Events	No	Client, 3 rd Party	TIER 3	MEDIUM
National Example's News and Updates	Yes	Client	TIER 3	LOW
On-Premise/Off-Premise Business Guides	No	Client	TIER 3	HIGH

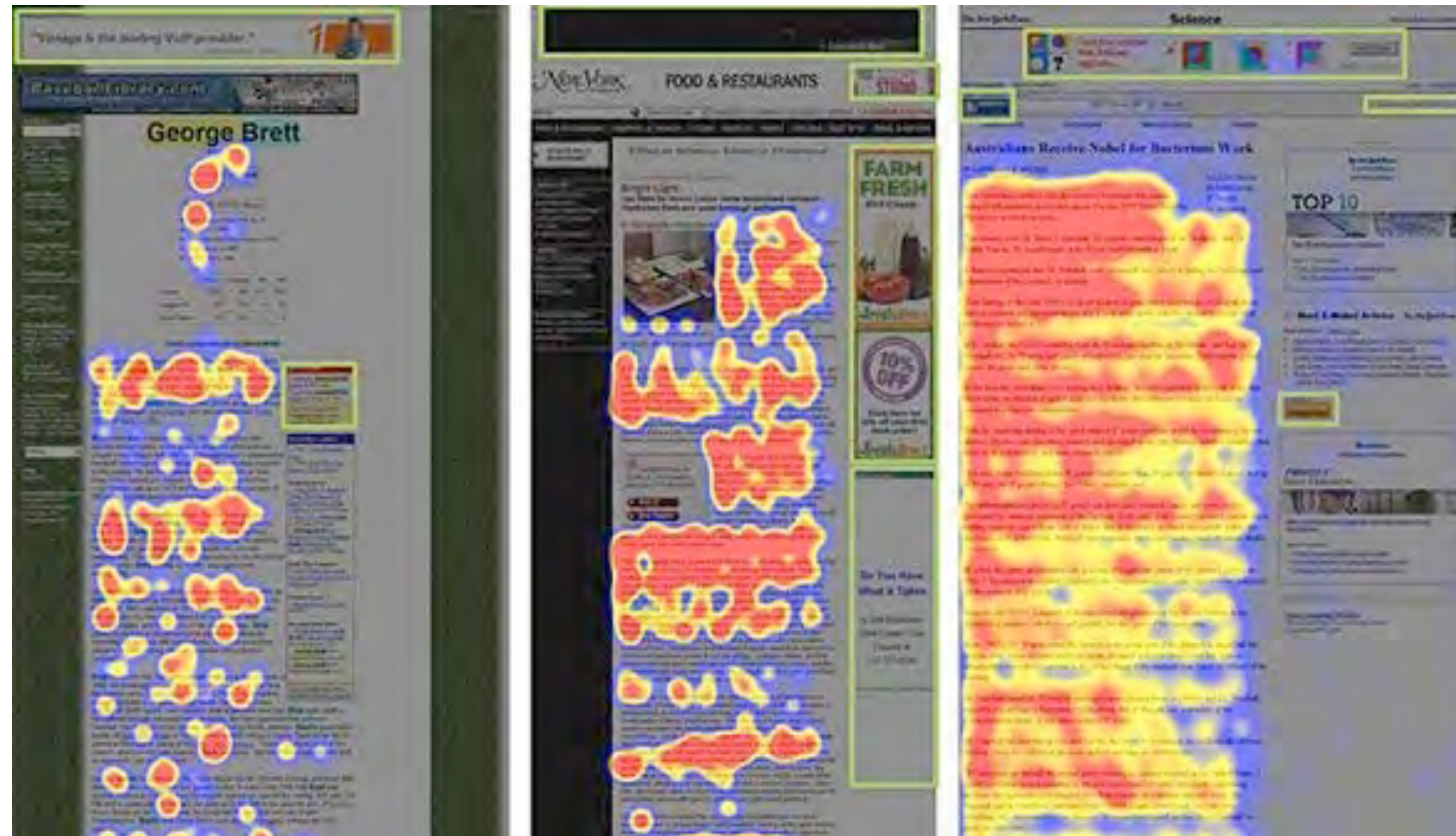
Trade Marketing & Sponsored Content

Supplier-driven and third-party content marketing

The key to sponsored content is striking a balance between supplier and customer goals in a way that never compromises the user experience. The key to licensed content is acquiring the license.



Sponsored content/advertising – best practices



This image depicts an eye-tracking study from Nielsen Norman where they tested user visual engagement on sites with ads. Red/Yellow spots highlight areas with the highest engagement, while the green boxes indicate areas with ads, which saw virtually no engagement.

Sponsored content – pricing

Though there is no real standard for pricing sponsored content/advertising units, there are a variety of variables that can influence how you choose to monetize content. The studies list below outline the factors in pricing these opportunities in great detail.

Our recommendation, would be to ease into monetization opportunities after building out the platform, collecting data and examining user behavior.

SOURCES

- Sponsored Content Guide by Moz
 - <https://moz.com/blog/everything-you-need-to-know-about-sponsored-content>
- Sponsored Content White Paper:
 - https://connect.relevance.com/hubfs/Rebranded_Case_Studies/WhitePaper_SponsoredArticles_RELEVANCE_2017.pdf?t=1515987641894

Pillars of web content management

The secret to effective content management for any organization is understanding and coordinating these four core concepts:

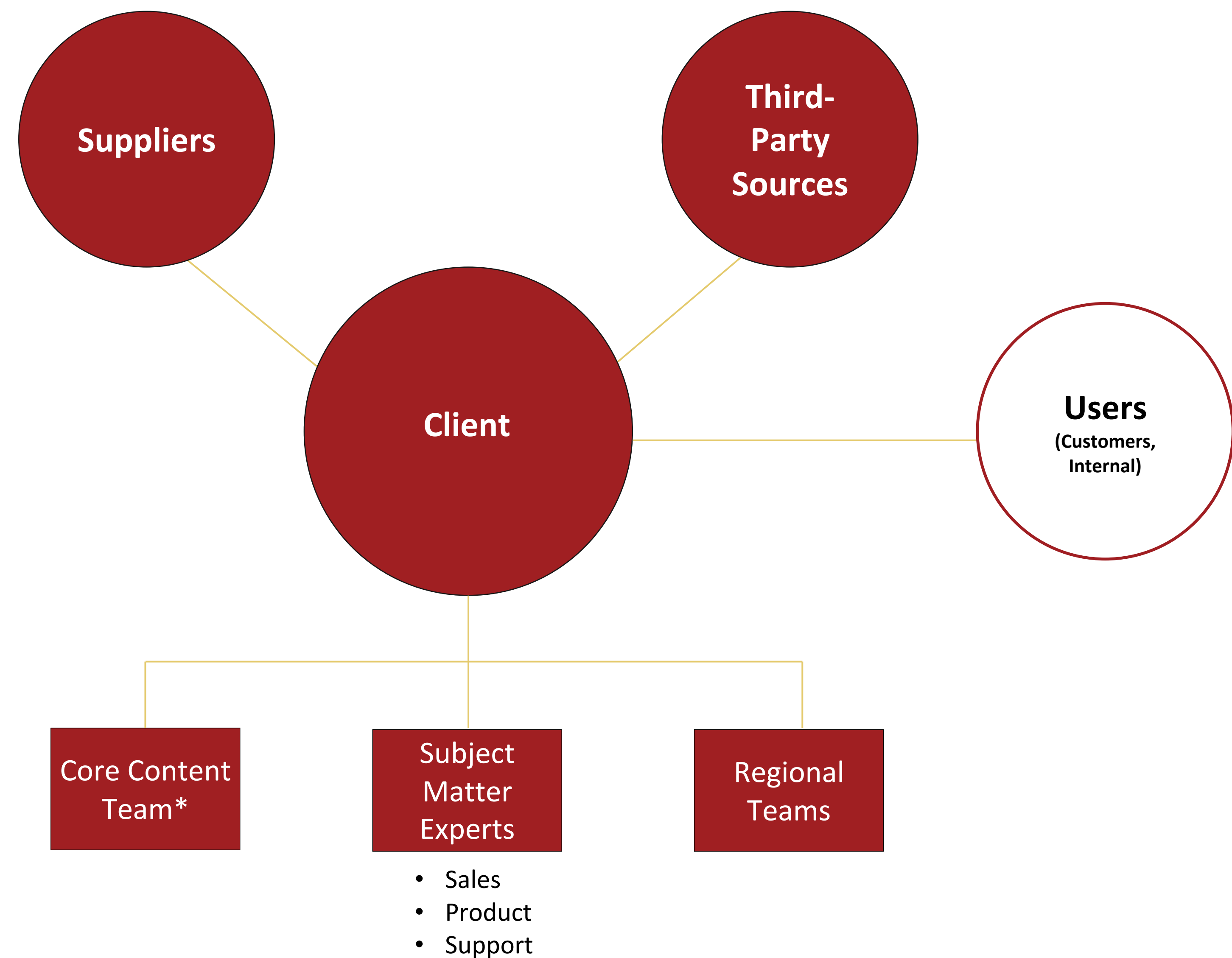
- **Content Modeling** – Editorial and User Experience
- **Content Aggregation** – Content Structure and Categorization
- **Editorial Tools & Workflow** – People and Process
- **Delivery & Output Management** – System Management and Integration

Key activities for National Example's success

The key activities that the National Example's organization will have to undertake to achieve and implement a consumer-facing content strategy, specifically in regards to the e-commerce platform and content marketing, include:

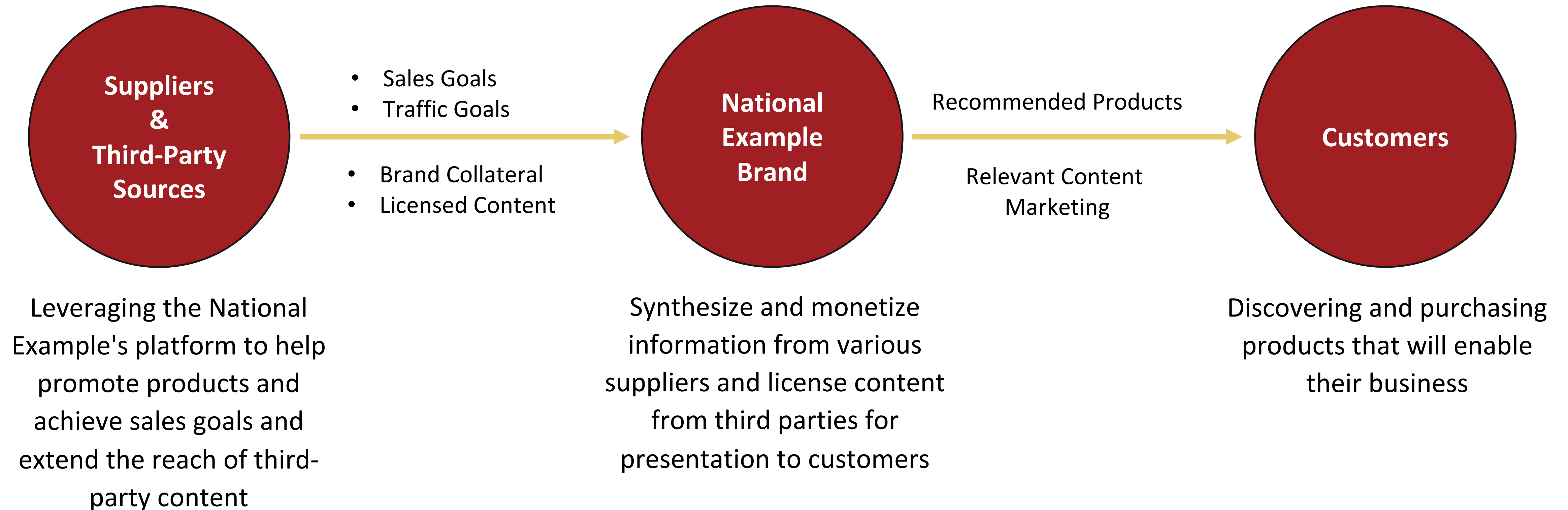
- **Content Tagging** – Validate existing product data quality and ensure the necessary tags have been applied to all product content being pulled from PIM to enable searching and filtering
- **Product Naming** – Engage product experts to develop a naming convention for product name (short description) that is both user-friendly and merchandises the product properly
- **Product Assets** – Ensure bottle shot URLs are captured in PIM and asset metadata is applied
- **Supplier Activation** – Enable product suppliers to become content providers to fill in gaps around product long descriptions and brand assets (images, videos, other resources)
- **Third-Party Activation & Licensing** – Solidifying partnerships with publications/content creators to outsource tasting notes, reviews and category descriptions across the product catalog
- **Editorial Workflows** – Establish a team and workflow for managing the content lifecycle for future iterations

National Example's content sources



***Note:** Currently, no core content team exists

External sources: supplier-driven and third-party content



Note: The key to sponsored content is striking a balance between supplier and customer goals in a way that never compromises the user experience. The key to licensed content is acquiring/negotiating the license.

Refined prioritization matrix

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Tasting Notes	No	3 rd Party, Suppliers	TIER 1	MEDIUM
Customer Purchasing History/Data	Yes	Client	TIER 1	HIGH
Promotions	Yes	Client, Suppliers	TIER 1/2	MEDIUM
Brand Marketing (Banners, Advertisements, Merchandising, Sales)	No	Suppliers	TIER 2	MEDIUM
Pricing Guides	Yes	Client	TIER 2	LOW
Product Notifications/Release Calendar	No	Client, 3 rd Party	TIER 2	MEDIUM
Industry Trends (Popularity, Geography, Seasonal)	No	Client	TIER 2	HIGH
Local/Industry Events	No	Client, 3 rd Party	TIER 2	MEDIUM
On-Premise/Off-Premise Business Guides	No	Client	TIER 2	HIGH
Flavor Profiles	No	3 rd Party, Suppliers	TIER 3	MEDIUM
Food Pairings	No	3 rd Party, Suppliers	TIER 3	MEDIUM
Recipes	No	3 rd Party	TIER 3	MEDIUM
National Example's News and Updates	Yes	Client	TIER 3	LOW

Activating the core-content recommendations

- The following slides represent the core-content recommendations, along with third-party and supplier content recommendations, distilled into page-level content strategies for each of the pages below. These will indicate how to best activate the content at our disposal and lead to the experience our customers and internal audiences seek:
 - Product Search/Listing
 - Product Detail
 - Product Insights/Opportunities
 - Category Listing
 - Brand Listing
 - Promotions
 - Support

NOTE: Additional page-level recommendations will be prepared as design continues.

Product search/listing

WHAT IT IS

Users can view, filter, search and sort through an aggregate list of products distributed by National Example's and make selections to add items to cart or learn more about a particular product.

FEATURES

- List of individual products with high-level product details and attributes such as product name, bottle shot category, geography, price, sizes available and inventory status
- Provide the option to identify case amount or bottle amount that you would like to add directly to cart or save the product to watchlist
- Filter list of products based on relevant attributes such as category, price, reserve status, item type
- Display a tag that identifies whether this product is on promotion or an opportunity for a customer in the sales view
- Option to sort by level of inventory, date added, price, name, etc.
- Provide a feature image and description to be used to highlight promotions, brands or specific product categories

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Marketing DAM – Promo/Brand Assets
- Promotion, Inventory Data

CONTENT TYPES

- Products
- Categories
- Promotions
- Brands

CHANNELS



AUDIENCES All - Customers, Sales, Service

CUSTOMER VALUE

Product Details/Attributes	—				+
Search/Filter Capability	—				+
Feature Image/CTA/Desc.	—				+
Add to Cart/Watchlist	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Product detail

WHAT IT IS

Users can get the detailed view of all information relevant to a particular product to understand more about the contents within the bottle, the people who manufactured the product and the impact it has on your business.

FEATURES

- See complete set of bottle shot assets related to a product – Front Shot, Back Shot, Label Shot, 360 shot
- View product name, tags and other metadata related to that product
- Option to select number of cases/bottles to add to cart based on current inventory
- Marketing descriptors about that product including product long description, tasting notes, flavor profiles, regional guides etc.
- Ability to view ratings/reviews from trusted third party sources and submit a product rating as a customer
- Ability to view assets, resources, activations directly from the suppliers about the particular brand of that product
- See recommendations on similar products, complimentary products and products that have been recommended to you by a sales consultant

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Marketing DAM – Promo/Brand Assets
- Customer Purchasing Data
- Recommendations Engine

CONTENT TYPES

- Product
- Categories
- Region
- Brand
- Tasting Notes
- Ratings/Reviews
- Flavor Profiles
- Food Pairings
- Recipes
- Insights

CHANNELS



AUDIENCES

All - Customers, Sales, Service

CUSTOMER VALUE

Product Details/Attributes	—				+
Marketing Descriptors	—				+
Brand Information	—				+
Recommendations	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Product insights/opportunities

WHAT IT IS

Users can see trends and data about the impact a product has on the market which will drive sales recommendations to customers

FEATURES

- Sales users can see purchasing trends for a particular product in a variety of graphical forms
- Sales users can see data pertaining to a specific product category or a specific region/territory
- Sales users can gather insights and deliver them with product recommendations to a specific customer that they are consulting
- Customer can see the the proposals that have been created for them along with the business insights
- Customers can also see when products are tagged as recommended for them by their sales rep

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Customer Purchasing Data
- Recommendations Engine

CONTENT TYPES

- Products
- Insights
- Proposal

CHANNELS



AUDIENCES

Sales, Customers

CUSTOMER VALUE

Product Insights	—				+
Proposals	—				+
Market Trends	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Category listing

WHAT IT IS

Users can browse through different product categories offered by National Example's and discover information about varietals and spirit styles while also being surfaced a list of products that fall into that category

FEATURES

- Category landing outlines the full National Example's categorical hierarchy (Category, Class, Sub-Class, Varietal) to allow user to browse through and identify new product styles
- When a category filter/tag is selected, a category image and short description appears above the product listing on the results page that sets context around the product type as well as displays all the products in that category
- User can click a CTA from that category feature image that leads to an article/guide on that specific category or varietal so they can learn more about the history, flavor profiles, regional specs of that category
- Promotion can be run on a specific product category which filters the product list and displays the discount

NOTE: Might be useful to start with Wine types and varietals and gradually move into other categories

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Marketing DAM
- CMS

CONTENT TYPES

- Categories
- Products
- Promotions
- Article

CHANNELS



AUDIENCES

All – Customers, Sales, Service

CUSTOMER VALUE

Category Landing	—				+
Category Feature Section	—				+
Category Article/Guides	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Brand listing

WHAT IT IS

Users can browse through a list of brands and suppliers that have partnerships. Users can see all products within that brand as well as marketing activations and resources created by the suppliers.

FEATURES

- Brand landing page outlines the full brand portfolio carried
- When a brand is selected, user navigates to a results page where a brand feature image and description appear above the product listing for that particular brand
- User can click a CTA from that category feature image that leads to a brand spotlight where documents, videos and other assets regarding the brand can be accessed
- Similar brand resources and assets can also be found as a component on the product detail page and linked to from there

NOTE: This will likely have to start off as a partnership between certain suppliers who can provide information directly from their supplier portals

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Marketing DAM
- CMS
- Suppliers

CONTENT TYPES

- Brands
- Products
- Promotions

CHANNELS



AUDIENCES

Customers, Sales

CUSTOMER VALUE

Brand Product Tags	—				+
Brand Assets	—				+
Brand Descriptions	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Promotions

WHAT IT IS

Users can view current promotions that help customers identify deals and special pricing on different types of products.

FEATURES

- Promotions are featured on the homepage to drive people to special product offers when they enter the experience.
- Promotions can populate the feature image/CTA above the product listing with information that highlights the details of the offer
- Products that are on promotion should have an indicator in both the product listing and product detail page
- Search results listing should feature active promotions below the filters in the sidebar, which can be reserved as essentially ad space for suppliers
- If you a user selects a promo item, then a discount code should be automatically applied in shopping cart/checkout

DEPENDENCIES

- PIM – Product Details, Product Assets, Product Tags
- Marketing DAM – Promo/Brand Assets
- Promotion, Inventory Data

CONTENT TYPES

- Products
- Promotions
- Brands
- Categories

CHANNELS



AUDIENCES

All – Customers, Sales, Service

CUSTOMER VALUE

Homepage Promo Tiles	—				+
Promo Feature Image	—				+
Offer Details	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

Support

WHAT IT IS

Users can find support/help content to help them self-service issues related to orders, refunds, credits, shipping, using the e-commerce tool, etc. They can also find information to connect them with service representatives either via phone or online.

FEATURES

- A searchable collection of help topics and categories that organize support articles for self-service
- Users can find support articles written and maintained by the service team that offer detailed guidance on
- Users can open a help case or find contact information to work directly with a service representative
- Service reps can see open cases that they have and start to manage open cases and solve issues

DEPENDENCIES

- CMS
- Support Team Knowledge/Expertise
- Help Taxonomy
- CRM/Case Management

CONTENT TYPES

- Articles

CHANNELS



AUDIENCES

All – Customers, Sales, Service

CUSTOMER VALUE

Support Landing	—				+
Support Articles	—				+
Help Topics/Tags	—				+

BUSINESS CONSIDERATIONS

Business Value	—				+
Operational Complexity	—				+
Implementation Complexity	—				+

5. Content Model



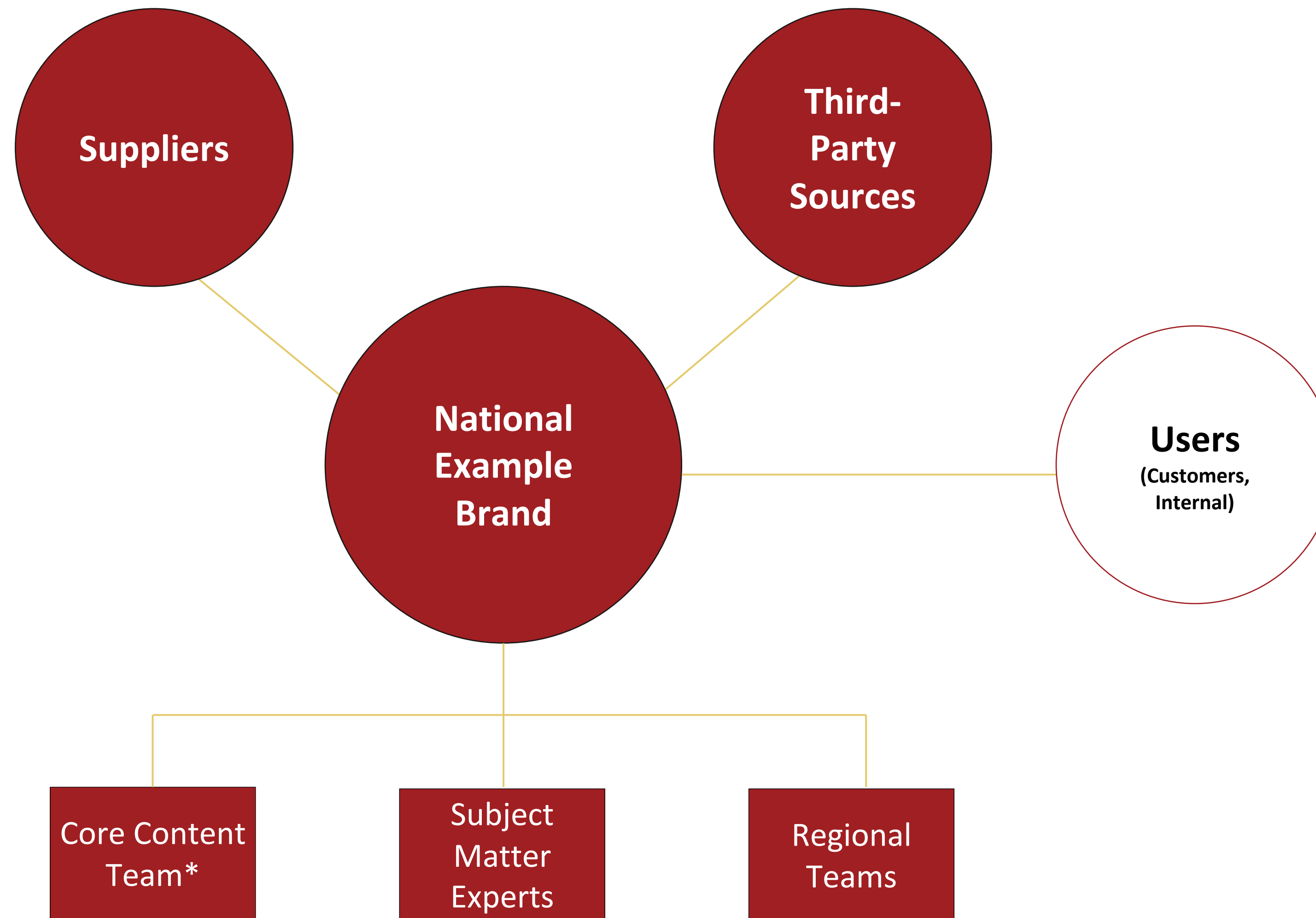
Operationalizing a content strategy: 2

- 1** Inventoried client and intranet site content to surface content types
 - Classifies all content by type and serves as the basis for future evaluations
- 2** Model all of the elements within each content type
 - Prepares content recommendations and gap analysis
 - Defines digital structure to “liquefy” and create new content in the systems (CMS and DAM)
- 3** Create a taxonomy and tagging strategy
 - Enables tagging of content to support search, personalization, display, filtering, and reuse
- 4** Develop a metadata and tagging schema
 - Organizes metadata required for each asset to support use cases
- 5** Identify high-level content business process from authoring to archive
 - Surfaces functional gaps to support lifecycle
 - Ensures adherence to Editorial Guidelines and Voice & Tone
 - Guides reorganization to support content publishing
- 6** Design a governance model for the content lifecycle
 - Aligns organizational functions around content lifecycle
- 7** Define the criteria for content evaluation and optimization
 - Allows content decisions to be informed by business needs

Content model use case

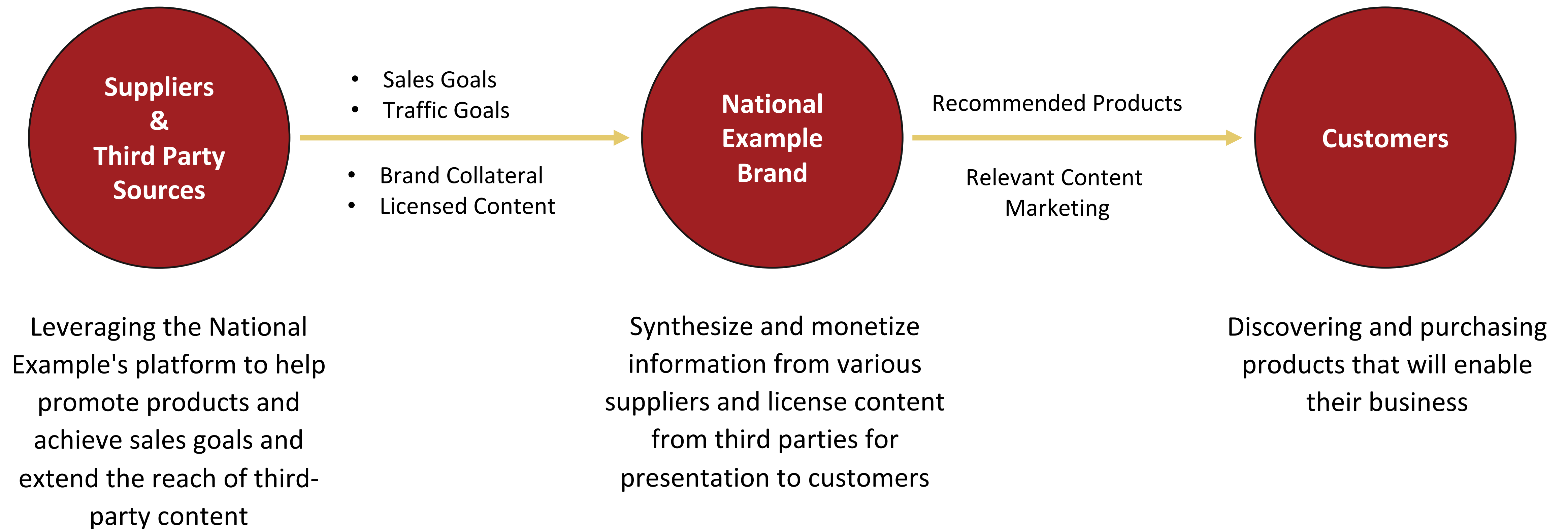
- Organizes our system of objects and relationships to identify what types of content needs to exist and how to connect those pieces of content
- Defines content structure to maintain a clear and consistent experience for the people who are interacting with the platforms and digesting information.
- Outlines design of authoring templates in CMS, and to some extent Salesforce, for creating and publishing different content types
- Allows us to assess gaps in current state content to identify level of effort and prioritize activities
- Assigns an audience (user) and source (creator) to a particular content element

National Example's content sources



***Note:** Currently, no core content team exists

External sources: supplier-driven and third-party content



Note: The key to sponsored content is striking a balance between supplier and customer goals in a way that never compromises the user experience. The key to licensed content is acquiring/negotiating the license.

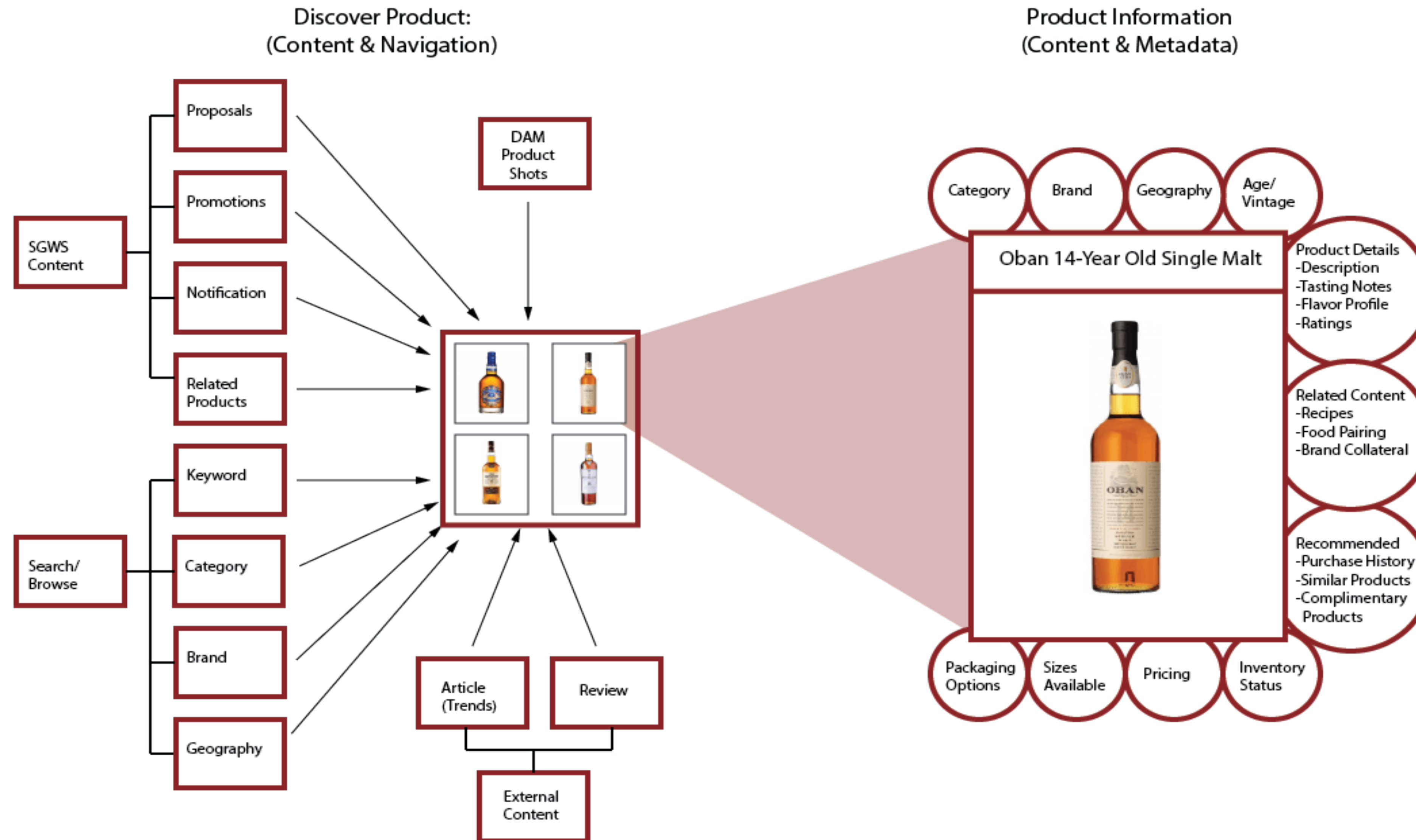
National Example's content areas

E-Commerce & Content Marketing	Sales Planning & Management	Service & Support	National Example's Internal Communications	Universal Messaging
• Product • Promotion • Brand • Rating/Review • Tasting Notes • Flavor Profile • Recipe • Brand Collateral • Article (Trends)	• Goals • Opportunities • Insights • Sales Activities • Territory (Route) • Proposal • Performance • Training	• Support/Help • Service Request	• News and Updates • Corporate Comm.	• Asset • Notification • Transaction

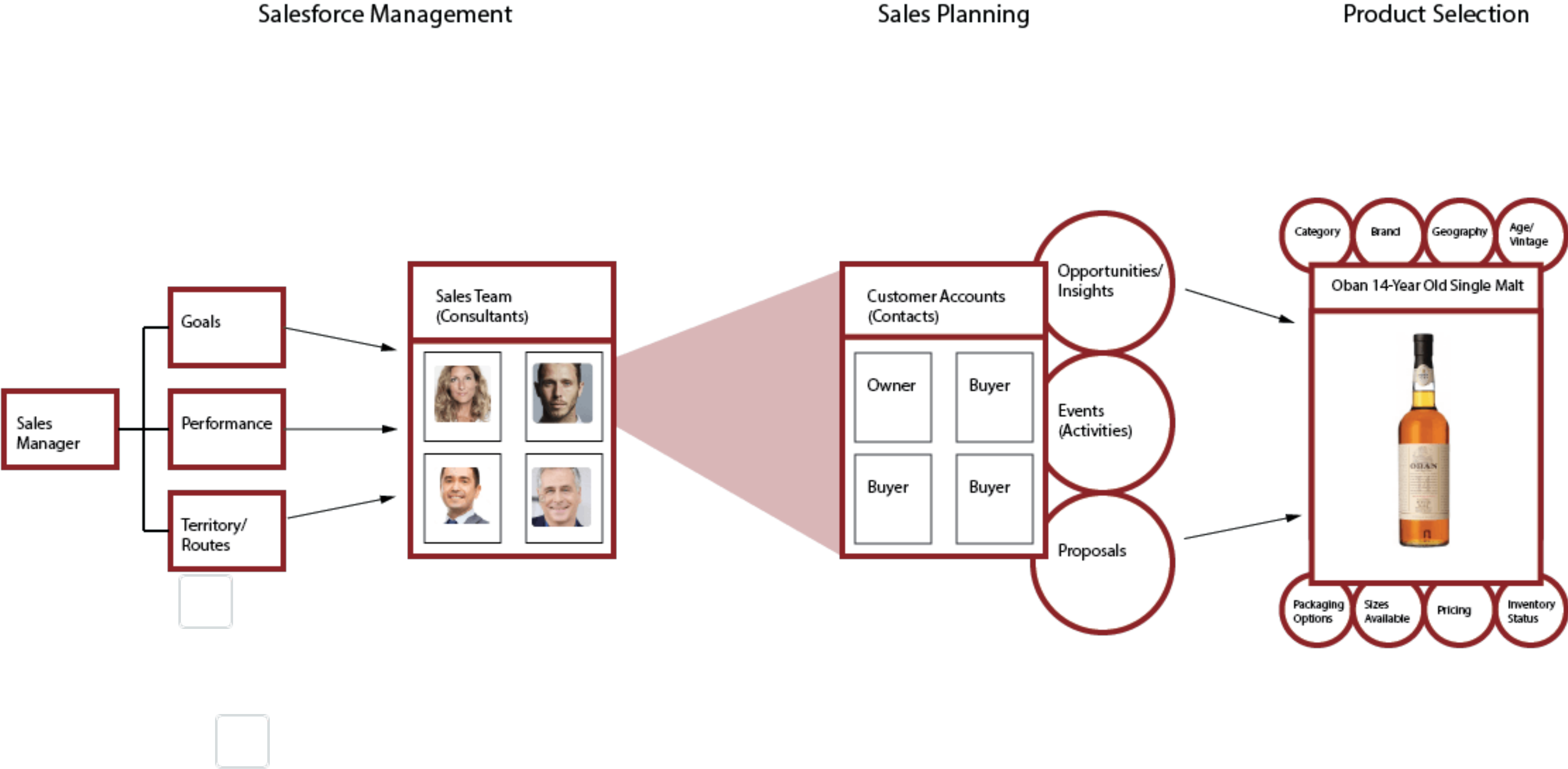


Consultative Sales Supported by Content

National Example's e-commerce content ecosystem modeled



National Example's sales content ecosystem modeled



6. Taxonomy

Operationalizing a content strategy: 3 - 4

- 1** Inventoried client and intranet site content to surface content types
 - Classifies all content by type and serves as the basis for future evaluations
- 2** Model all of the elements within each content type
 - Prepares content recommendations and gap analysis
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 - Allows content decisions to be informed by business needs

Taxonomy use case

- Develops a rich index of product metadata that enables searching and filtering across facets (product characteristics)
 - Categorization – Category, Class, Subclass, Varietal
 - Geography
 - Product Characteristics – Flavor, Color Material
 - Size/Packaging Type
 - ...
- Establishes a consistent vocabulary for systems and components (navigation, labels, dropdowns, filters, notifications, etc.)
- Defines complex relationships between data/content objects for insights, dynamic content and reporting
- Creates a categorization scheme for tagging assets to make them findable in DAM and readable as a URL string

National Example's hierarchies

- **Product Categories**

- CATEGORY → CLASS → SUB-CLASS → VARIETAL (*if category = wine OR material = grape*)

- **Item**

- PRODUCT (Tier 1, Product Family w/ shared attributes) → ITEM (Tier 2, Sellable Unit)

- **Geography**

- COUNTRY OF ORIGIN → REGION (state, province, etc.) → SUB-REGION → APPELLATION → VINEYARD (mainly applies to wine)

- **Packaging**

- PALLET → CASE → INNER PACK → BASE UNIT (bottle)

- **Supplier**

- SUPPLIER → BRAND → PRODUCT FAMILY

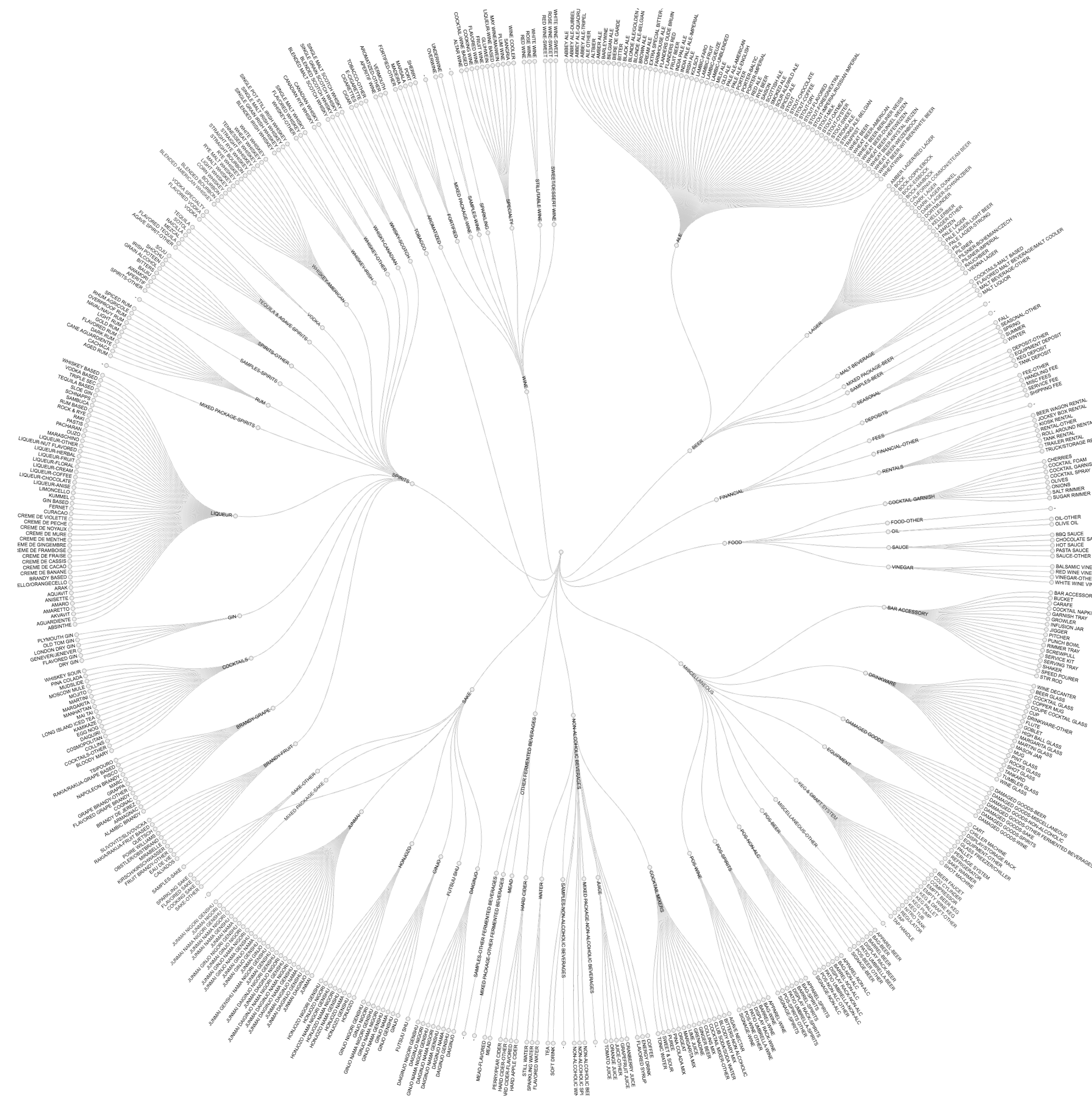
- **Sales Team**

- SALES MANAGER → SALES CONSULTANTS

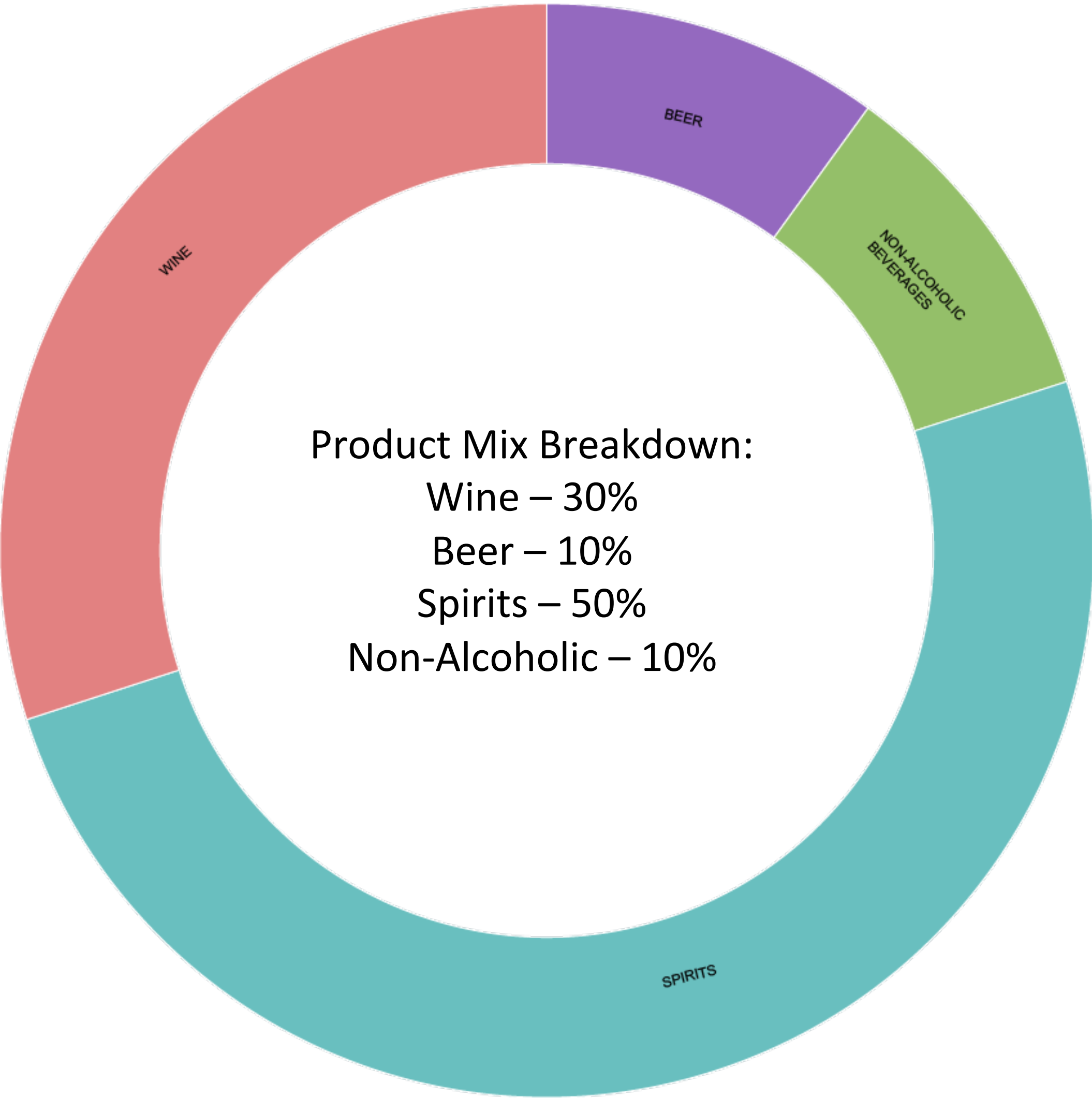
- **Customers (Accounts)**

- ACCOUNT → CONTACTS → OWNER → BUYERS

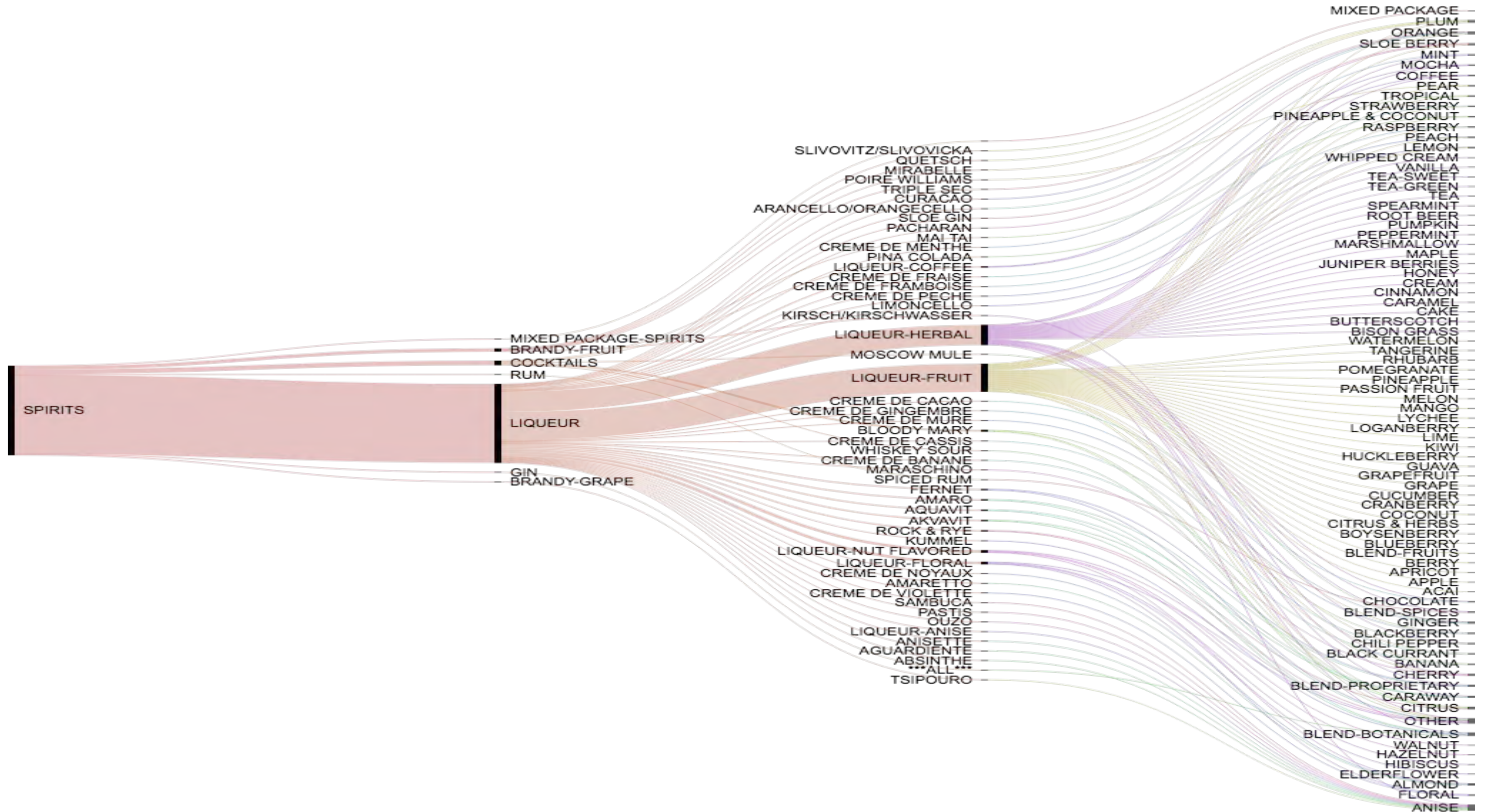
Product categorization taxonomy (primary)



Taxonomy in action | customer product mix



Taxonomy in action | product characteristics – flavor



Taxonomy in action | product asset tags – spirits

Asset Family



Individual Asset



Asset Details

- Asset ID
- Asset URL
- Filename
- Dimensions
- Asset Type
- Shot Type
- Alt Text

Product Details

- Category
- Brand
- Supplier
- Country of Origin
- Age
- Packaging Type

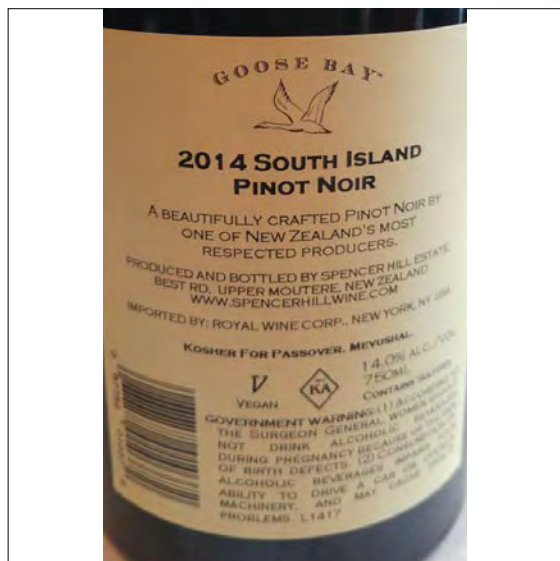
Usage

- Channel Usage
- Asset Owner
- Date Shot
- Date Uploaded
- Expiration Date

Example:
Spirits
Whiskey
Hibiki Harmony
Suntory Beam
Japan
8 years
Case

Taxonomy in action | product asset tags – wine

Asset Family



Individual Asset



Asset Details

Asset ID
Asset URL
Filename
Dimensions
Asset Type
Shot Type
Alt Text

Product Details

Category, Class and Subclass
Brand
Supplier
Country of Origin
Region
Varietal
Vintage
Packaging Type

Usage

Channel Usage
Asset Owner
Date Shot
Date Uploaded
Expiration Date

Example:
Wine
Still/Table Wine
Red
Goose Bay
Goose Bay
New Zealand
East Bay
Pinot Noir
2014
Case

Other taxonomies or controlled vocabularies

- Users
 - Sales Teams
 - Customer Type/Segment
 - Service Request
- Sales
 - Visit Planning
 - Opportunity Type
 - Goal Type
- Transactions
 - Transaction Types
 - Notification Triggers

Operationalizing a content strategy: 5 - 7

- 1** Inventoried client and intranet site content to surface content types
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 - Allows content decisions to be informed by business needs

Content governance overview

Governance

Implementing content delivery and maintenance for the the National
Example's digital experience will require the management of
multiple complexities...

Three stand out.

Content governance overview

Complexity Drivers



Multiple Systems

Unify content delivery from CMS, MDM, Sapphire, etc.

Implement DAM and dynamic content technologies

Content governance overview

Complexity Drivers



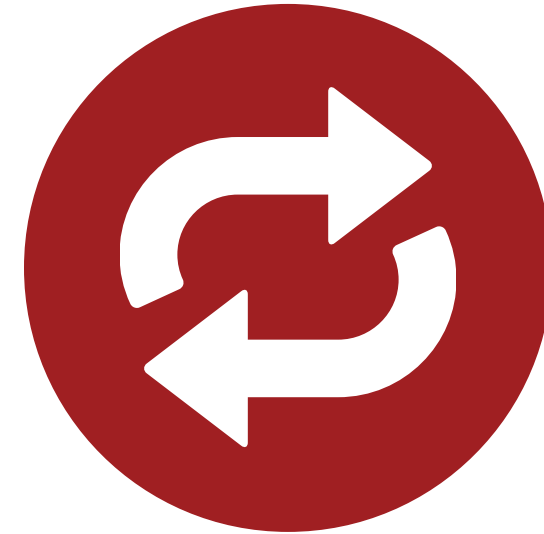
Numerous Stakeholders

Drive change and improvement through communication

Collaborate to understand business, supplier and technology requirements

Content governance overview

Complexity Drivers



Evolving Standards

Manage digital content processes and tools to meet changing business needs and customer preference

Optimize the way National Example's operates and the results delivered

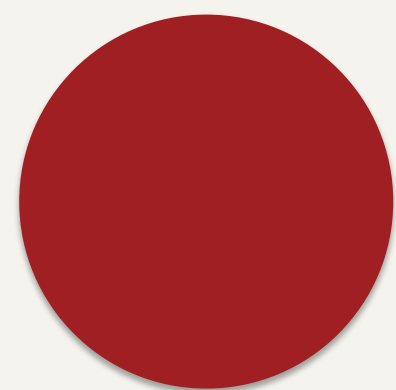
Content Governance Structure

Governance models

To manage these complexities, some form of governance is required. There are three common organizational governance models, each with its own strengths and weaknesses:

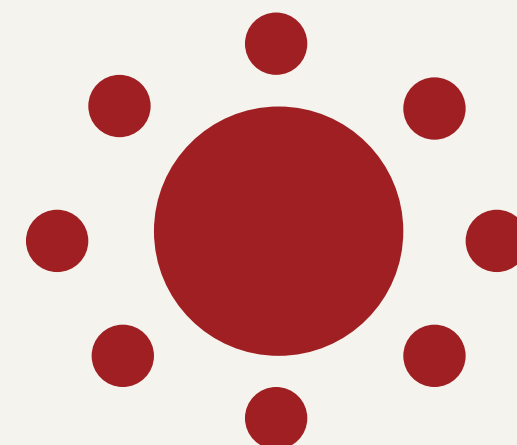
Centralized

- Digital governance and operations aligned in one organizational group
- Other groups act as customers of central team



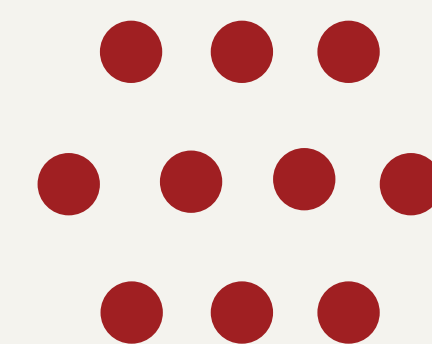
Federated

- Digital governance is centralized
- Digital content is subject to central approvals
- Digital operations are shared among entities

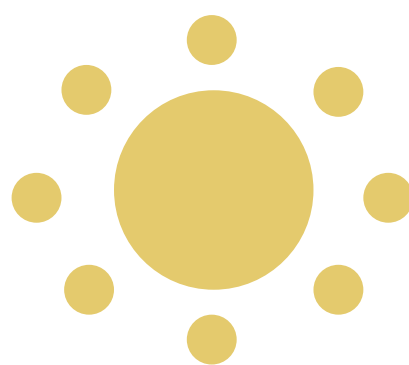


Decentralized

- Digital governance and operations are distributed among various entities and decentralized
- Digital content is distributed and approved within distributed teams

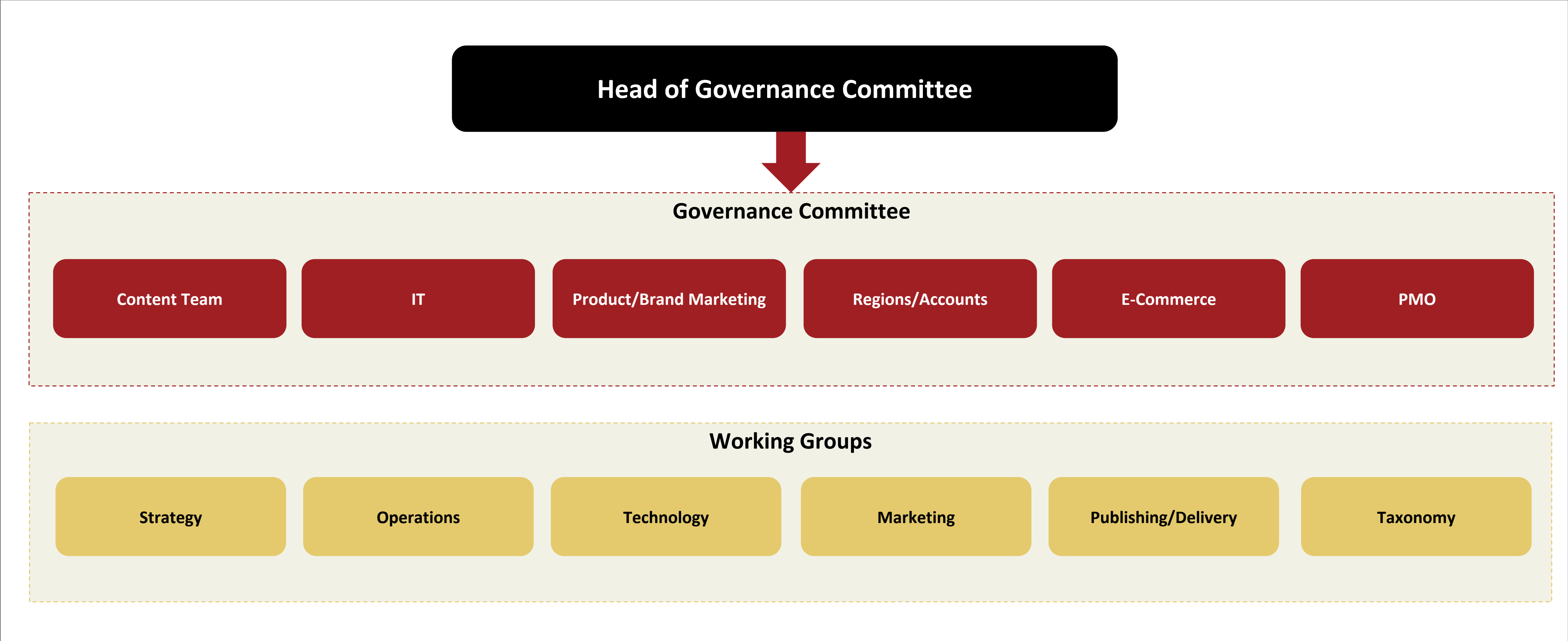
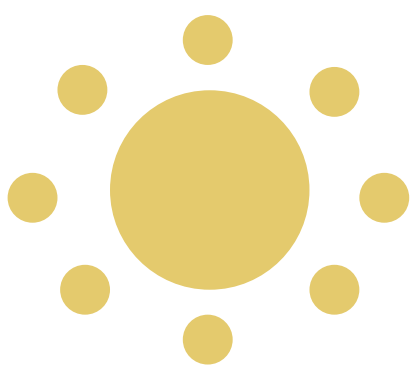


Recommended governance model – federated

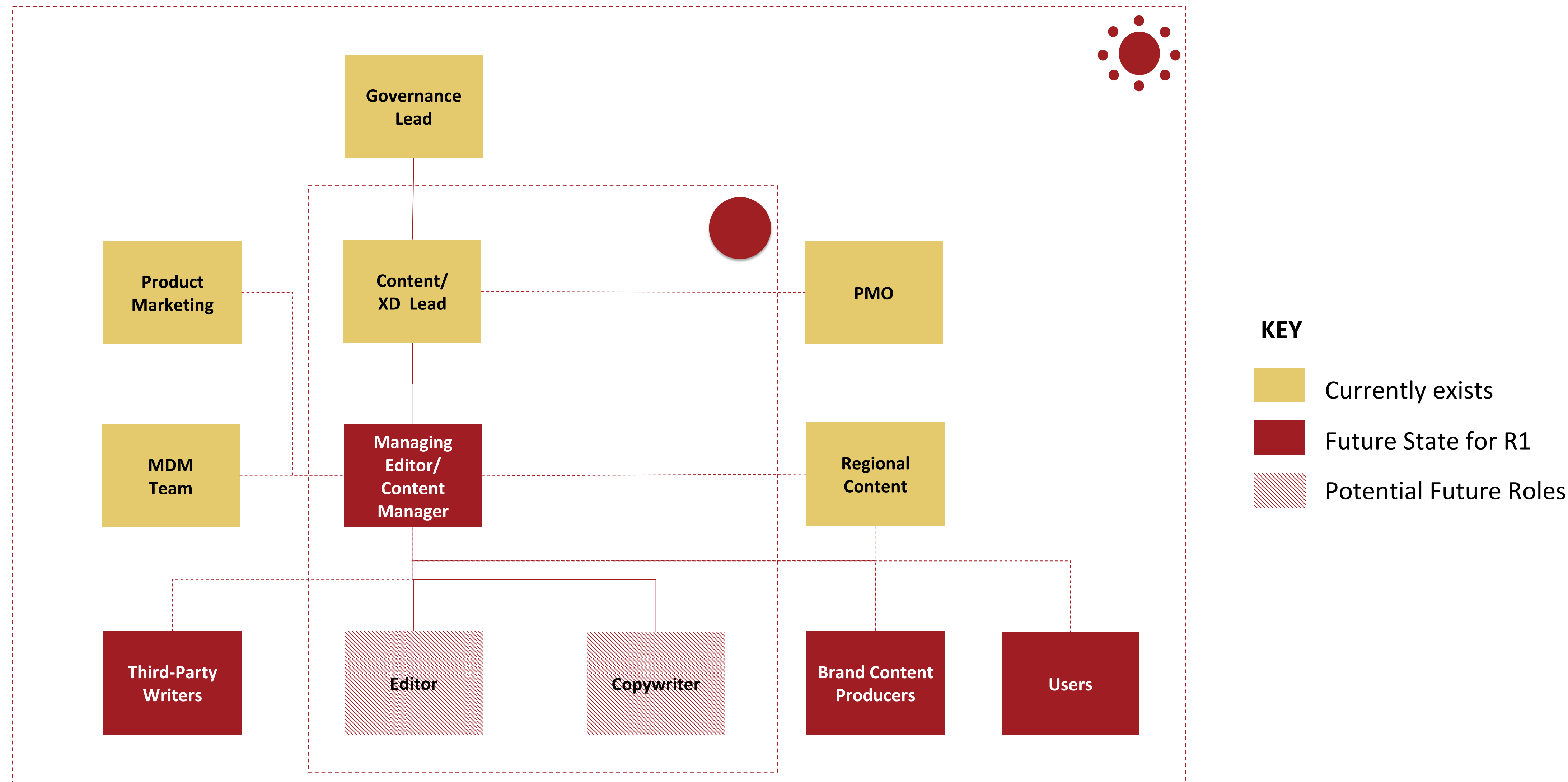


Digital Governance Board		
- Members: Content Team, Business Teams, IT, Marketing, PMO - Role: Provide vision, set goals and objectives, make strategic decisions about digital presence and taxonomy, final authority on policies and standards		
Content Operations - Members: Content team - Role: Own overall digital experience; monitor, enforce, and evolve governance standards; provide product management for CMS and content/experience production support	User Experience	Digital Governance Board Role: Provide vision, set goals and objectives, make strategic decisions about digital presence, content model and taxonomy, final authority on policies and standards
Content Providers (internal and external) - Members: Third-party publishers, Suppliers, MDM Team - Role: Provide trusted, unbiased content to establish credibility and position National Example as a curated platform. Provide brand content. Information from MDM team		
Content Delivery Management - Members: IT - Role: Deliver technology to enable content operations; control setup of content types, CMS design, etc.		

Content governance board



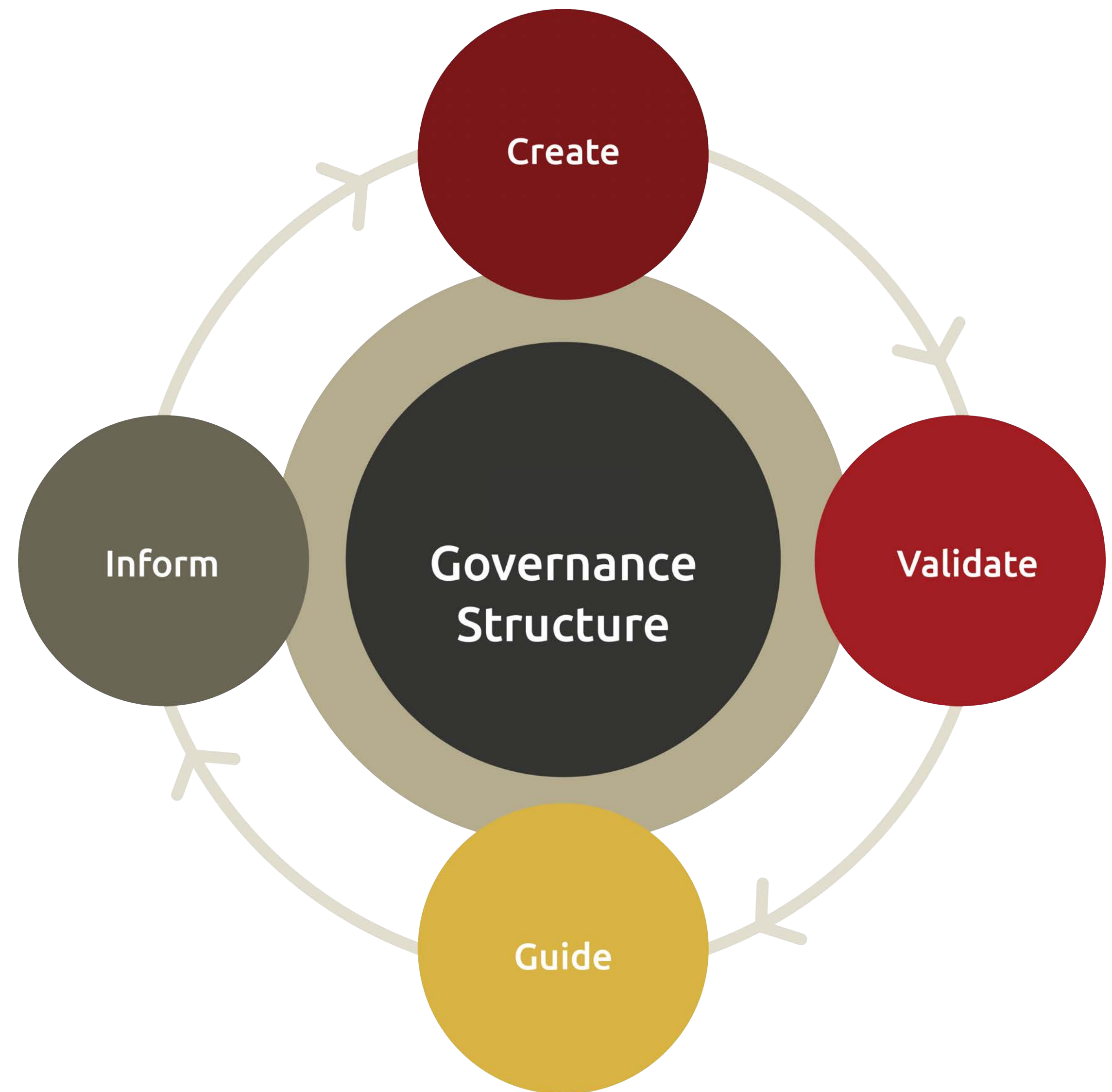
Content operations team in context



Content governance steps

Effective governance can help manage content delivery and maintenance and content model and taxonomy implementation

1. Core content team
2. Governance board



Content team: content governance steps

1. Create

Core Content Team

Content team with input from:

1. Product Marketing
2. Suppliers
3. MDM
4. Third-Party Sources
5. User-Generated Content

Content Types

1. Product Information
2. Promotions
3. Brand Content
4. Saving Assets in DAM
5. Incorporating User-Generated Content (Ratings & Reviews)
6. Incorporating Third-Party Content (Tasting Notes, etc.)

Content team: content governance steps

2.Validate

Core Content Team

A Managing Editor or Content Operations Manager will provide ongoing oversight and analysis on content from various internal and external sources as outline above.

Responsibilities

- 1. Review new content, new tags, and fix issues
- 2. Analyze tag and content usage to identify trends and changes
- 3. Identify education and communication needs
- 4. Report findings to the Governance and Stakeholder groups

Core content team: roles and responsibilities

Role	Key responsibilities
Managing Editor/Content Manager	• Ultimate owner of content; accountable for the content performance • Initiate content requests for update/addition • Gather and facilitate all content to submit with requests • Review and provide feedback on content; authorize content deployment • Responsible for third-party licensing agreements and managing relationships • Responsible for moderation and review of third-party content and user-generated content
Content Editor	• Collaborate with creators on content development • Review content for substantive, organizational, branding, and legal concerns • Ensure compliance with styles and standards • Moderate user-generated content as necessary
Copywriter/ Content Creator (external)	• Create content: Client, Suppliers, Users all create content subject to moderation and workflow approval
Creative/UX (external)	• Lead creative development effort and manage creative developer team • Ensure quality and timeliness of delivery of creative elements • Evolve creative standards

Content governance board: content governance steps

3.Guide

Content Governance Board

A governance board should be used to make decisions through targeted collaboration.

This small fluid group of delegates should meet monthly or quarterly including, but not limited to, representatives from the following:

- Products/Brands/Regions
- Content Team
- MDM Team
- PMO
- IT

Responsibilities

1. Reviews change recommendations of Managing Editor
2. Drives overall implementation and adoption of digital content principles
3. Works with stakeholders to understand business requirements and facilitates collaboration
4. Communicates with organization to drive change within groups
5. Support the long-range goals of the digital strategy
6. Ensure that decisions are informed and processes are improved

Content governance board: content governance steps

4. Inform

Content Governance Board

A larger group of stakeholders from the groups represented on the governance board will continue to be informed on a quarterly basis and provide strategic direction:

- Strategy
- Products/Brands/Regions
- Content Team
- MDM Team
- PMO
- IT

Responsibilities

1. Receives updates on changes
2. Provides expert perspective on escalated topics
3. Facilitates consensus and decisions on strategic issues
4. Collaborates in digital content education and communication

Content governance board: roles and responsibilities

The head of the Content Governance Board should be introduced to lead the content governance board composed of a representative of each digital channel to leverage synergies and ensure consistencies across the organization

Role	Key responsibilities
Communications and change management	• Corporate information dissemination, internal and external
Corporate Brand/Design	• Brand compliance, visual design and consistency
Head of Content Governance	• Final decision maker for the governance model • Leverage synergies and ensures consistencies across single governance models of each site (web channel) in the organization
UX/Content Team Lead	• Business vision, concept, and strategy • Plan, direct, and coordinate content operations • Formulate standards and policies • Plan the use of tools and human resources
Managing Editor/Content Manager	• Brand compliance, copy and content • Manage daily operations for iimplementation of vision, content lifecycle management, style guide, information architecture and overall quality • Manage third-party and user-generated content sources
Technology	• Technology strategy and implementation for digital experience delivery
Business units	• Corporate, product, service, and support content owners

Other (PMO): roles and responsibilities

Roles	Key responsibilities
Program Management	• Understand and gain agreement on the overall objectives, scope, risk, approach, budget, etc. • Define, adopt and evolve the standard project management procedures that will be used to manage the project • Coordinate with business, content operations and outside vendors to manage projects to completion • Drive appropriate business process improvement and change management efforts
Performance Insight	• Provide metrics and analysis on digital content, user experience and customer feedback • Provide guidance on how to integrate analytics and maximize data • Develop and distribute dashboards • Support change management efforts
Business Analysis	• Elicit, analyze, communicate and validate business requirements • Facilitate changes to business processes and or policies • Work with outside vendors and internal IT to develop applications and tools that meet customer and business needs • Relate/convey Internet application trends to business owners

Other (IT): roles and responsibilities

Roles	Key responsibilities
System Administrator	• Represents technology on governance board to strategize content delivery methodologies • Maintain content modules, content types, taxonomies, controlled vocabularies and presentation templates • Control site process • Provide user access • Maintain workflows
Technology Architect	• Provide, adopt and evolve technology standards
System Administrator	• Maintain infrastructure, upgrades, rollout
Technical Development and Support	• Application development • UE Design for changes • Performance and technical issue resolution and escalation
Quality Assurance	• Testing and UAT on technical releases

Content Lifecycle & Reviews

Content strategy lifecycle: questions governance addresses

0. Content Governance

- What process should we use?
- To what standards must we adhere?
- Who is available to support this effort?

1. Assess:

- How is the experience and its content performing?
- What actions can be taken to improve performance?
- Who will take it?
- What issues exist around standards compliance?
- What corrective measures should be enacted?

2. Define:

- What business/customer outcomes are you trying to achieve?
- How will you know if you're successful? How will you measure?
- Who owns this content?
- Who is responsible for approving, creating, maintaining, and retiring this content?
- Are enough resources available?
- How long will this take?



Content strategy lifecycle: questions governance addresses

3. Define:

- What is the source of content?
- How will users access this content?
- What content should be created?
- What other touchpoints should be considered?
- How long should this content be valid?

4. Implement

- What template do we use?
- What standards should be followed as content is created?
- Will an agency support content creation?
- Do assets exist that we can reuse?
- Who will enter content into the CMS?
- How do we optimize for search?

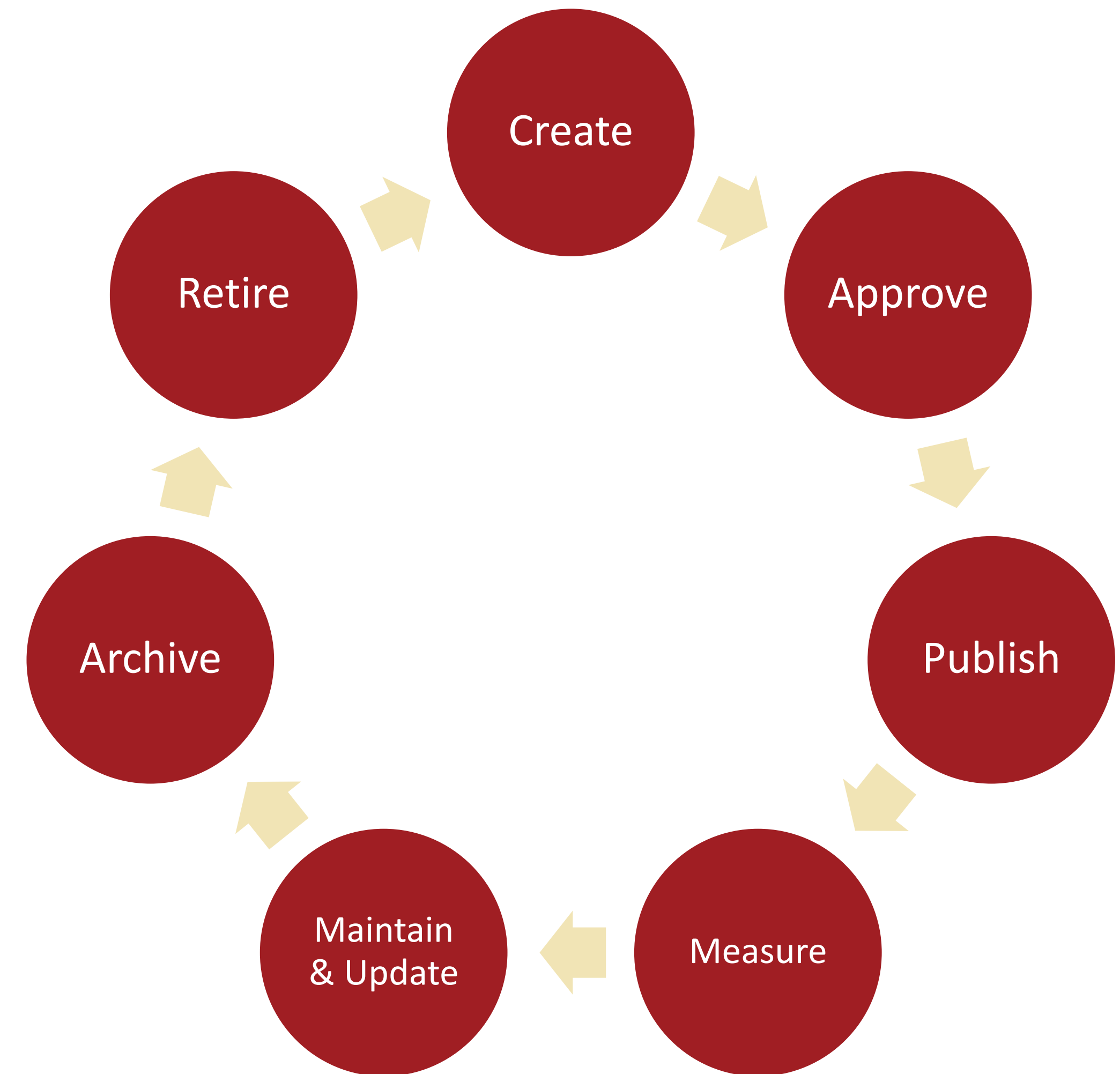
5. Optimize

- What testing is required before deployment?
- When will this content be published?
- At what intervals will updates be released?
- What is the measurement plan for content performance?
- When will this content be retired?



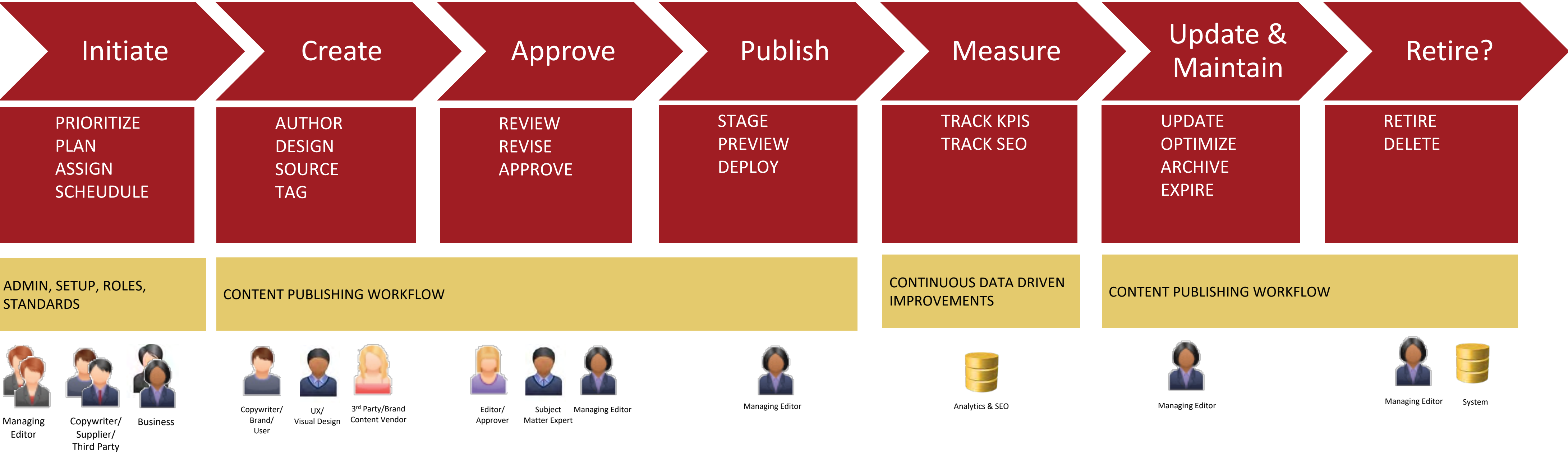
Generic content maintenance process

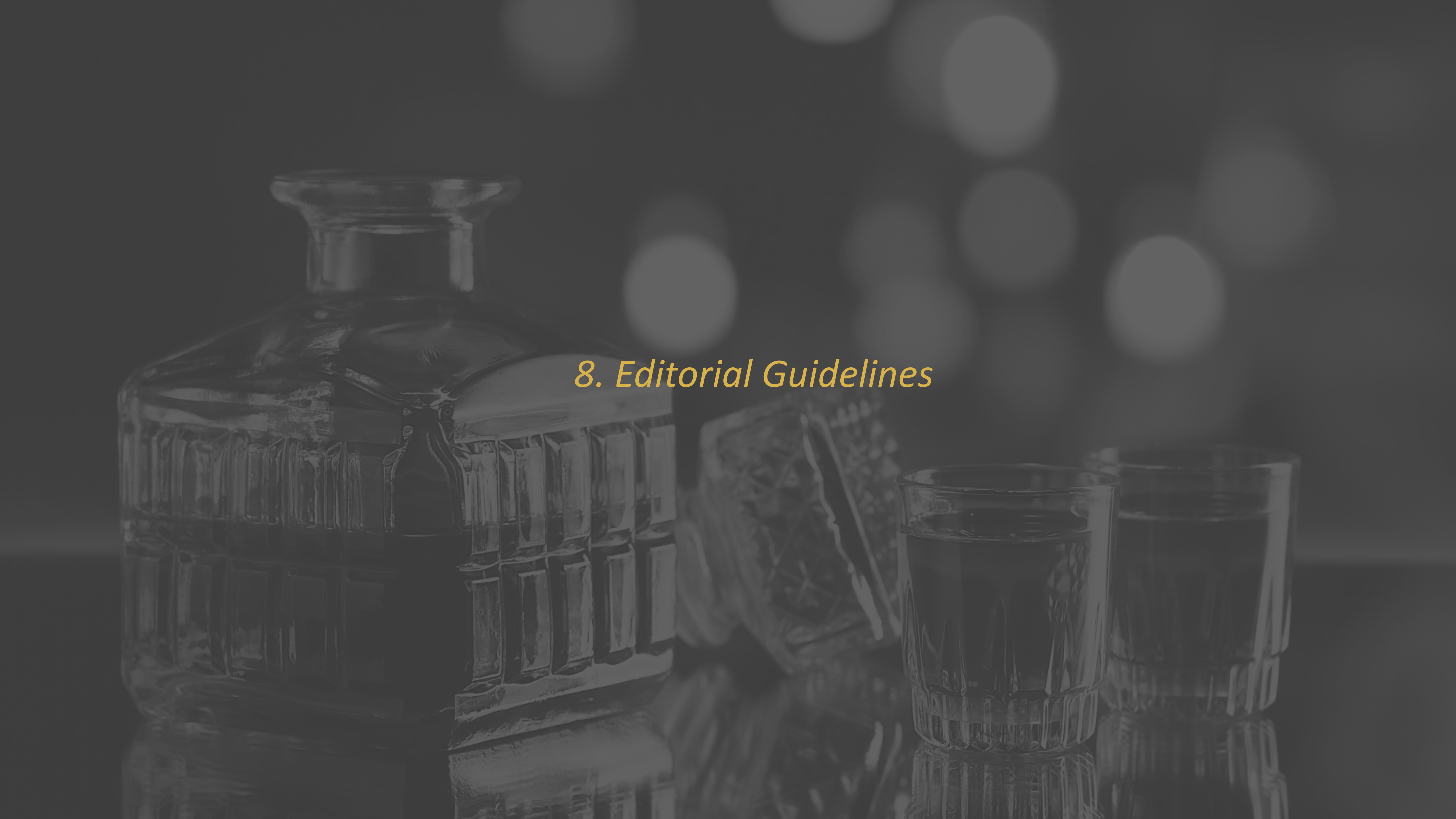
1. Create: Content will be provided from various sources, internally and externally
2. Approve: The mechanisms the content team and other approve content that is created for publication on the site via workflow approvals or moderation
3. Publish: Actually pushing content to the live site(s) after all approvals are met
4. Measure: Ascertaining which content is performing against KPIs or metrics and making plans for steps 5-7 accordingly
5. Maintain & Update: Making any updates to meet business needs or otherwise updating content to keep it fresh and relevant (subject to approvals as required)
6. Archive: Deciding when content is now longer applicable for presentation on the experience. This could be based on a timed review (quarterly, yearly, etc.), but can still be accessible in the system for potential future use
7. Retire: Determining when content is now longer relevant to the experience and will not be applicable in the future and retiring it completely.



Example content workflow

DEFINING YOUR PROCESS



A dark, moody photograph of a crystal decanter and two glasses on a reflective surface. The decanter is on the left, with a faceted body and a stopper. Two glasses are on the right. The background is dark with bokeh light effects. The text "8. Editorial Guidelines" is overlaid in the center in a yellow, italicized font.

8. Editorial Guidelines

Operationalizing a content strategy: 6 – 7

- 1** Inventoried client and intranet site content to surface content types
 - Classifies all content by type and serves as the basis for future evaluations
- 2** Model all of the elements within each content type
 - Prepares content recommendations and gap analysis
 - Defines digital structure to “liquefy” and create new content in the systems (CMS and DAM)
- 3** Create a taxonomy and tagging strategy
 - Enables tagging of content to support search, personalization, display, filtering, and reuse
- 4** Develop a metadata and tagging schema
 - Organizes metadata required for each asset to support use cases
- 5** Identify high-level content business process from authoring to archive
 - Surfaces functional gaps to support lifecycle
 - Ensures adherence to Editorial Guidelines and Voice & Tone
 - Guides reorganization to support content publishing
- 6** Design a governance model for the content lifecycle
 - Aligns organizational functions around content lifecycle
- 7** Define the criteria for content evaluation and optimization
 - Allows content decisions to be informed by business needs

Editorial guidelines use case

- Establishes the National Example's brand voice to maintain consistency in tone throughout the various digital experiences
- Creates rules for crafting messaging and other content that remains faithful to this voice and tone
- Provides best practice recommendations on how to write digital elements such as browser titles, CTAs, error messages and more
- Provides general usage guidelines for producing content for the digital experience

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Voice and tone

Brand Voice & Values



Proof

Brand Voice

- ✓ Confident
- ✓ Trustworthy
- ✓ Loyal
- ✓ Progressive
- ✓ Passionate

Brand Values

- ✓ Reinvention
- ✓ Performance
- ✓ Legacy
- ✓ Stewardship
- ✓ Passion

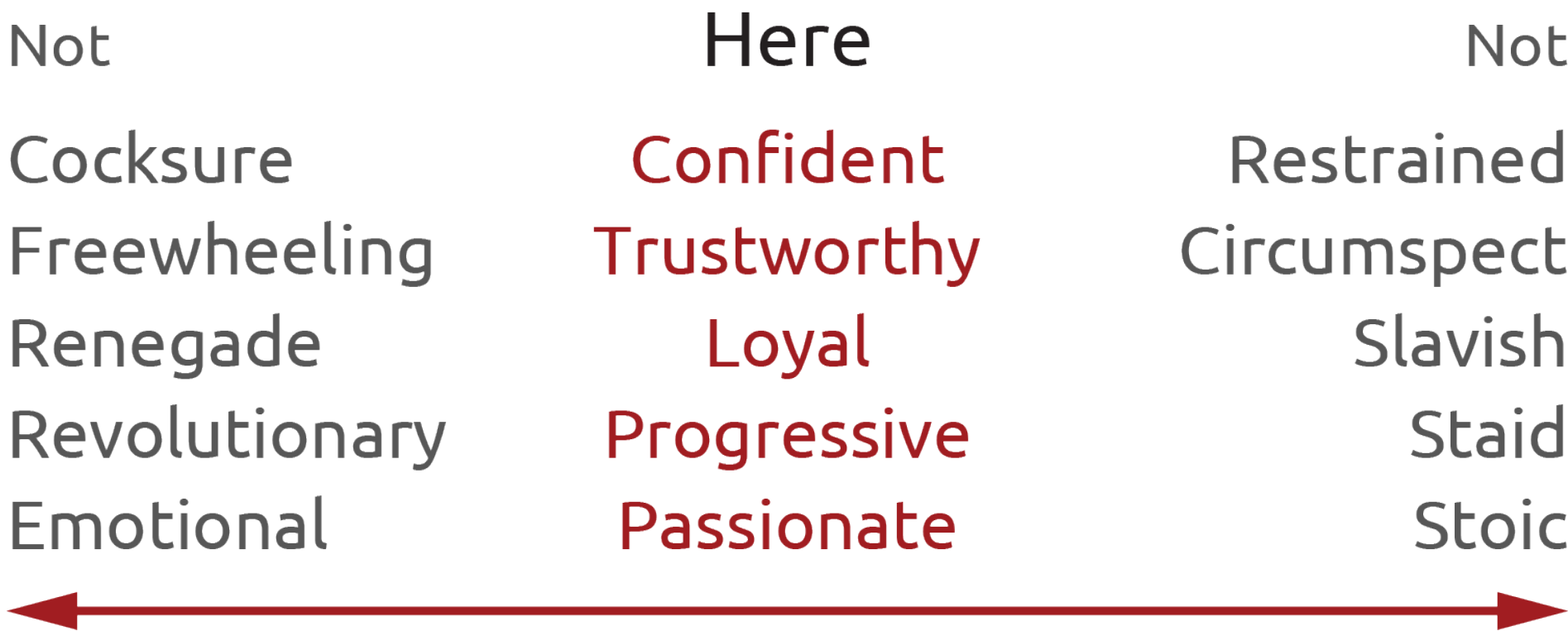
SG Vision

"To be the world's top-performing, **most trusted** and highly efficient distributor of adult beverages."

Top-performance and high efficiency are what we expect from implementing DE.

✓ **Most Trusted** comes from Proof (transparency through DE)

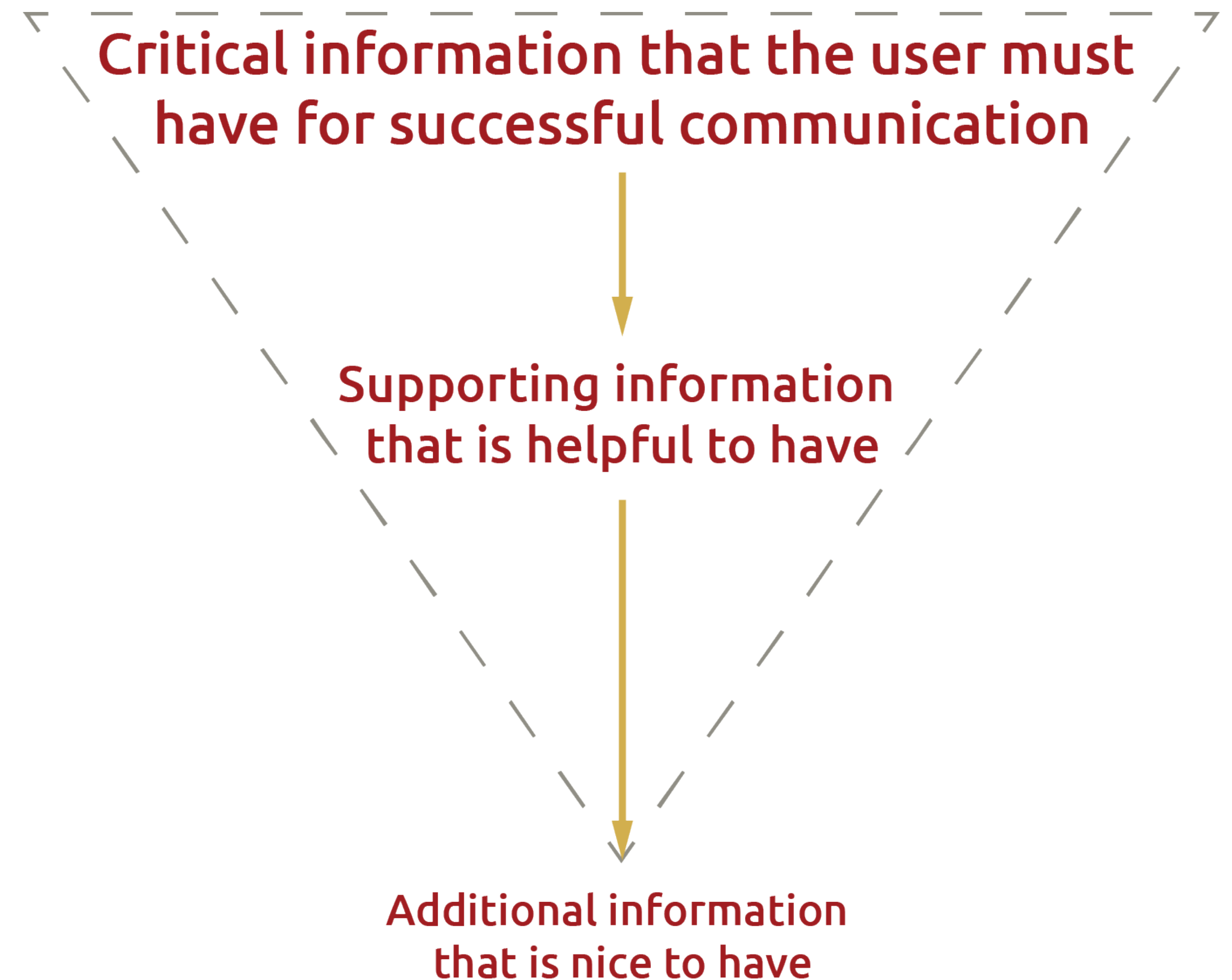
Voice Scale



User-centered writing recommendations

The way we write for interfaces shapes the users perception of our digital products. The editorial guidelines provide best practices on how to use language that enhances the experience:

- User-centered digital writing
- Labeling and nomenclature
- Usage and style
- Accessibility best practices



Continuing to operationalize the content strategy

- 1** Inventoried client and intranet site content to surface content types
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Prioritized steps to operationalizing governance model

