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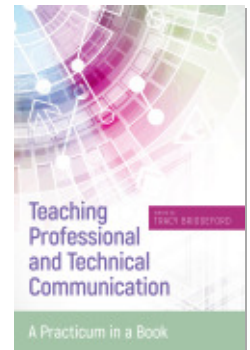
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TEACHING CONTENT STRATEGY IN PROFESSIONAL AND TECHNICAL COMMUNICATION

Dave Clark

Amanda, like all experienced instructors of professional and technical communication, has long engaged in the heavy lifting needed to help students keep up on the newest developments in the field, including toolsets and frameworks they will certainly encounter (e.g., InDesign, component content management) and theories and methodologies they need to know (genre theory, agile/scrum methodologies). In addition, she and her colleagues help students become familiar with the methods and foibles of their most likely workplace collaborators: project managers, business analysts, and subject-matter experts.

There's always something new. Professional and technical communication has always been an ambitious, expansive field that incorporates new approaches and puts its own shape on them. When knowledge management was at its peak in the early 2000s, Amanda and her students discussed Corey Wick's (2000) piece urging technical communicators to engage with knowledge management, along with key texts from *Harvard Business Review* and John Seely Brown and Paul Duguid (Brown and Duguid 2000). She also taught them the basics of content management and single sourcing. As *component content management* became the term of art, Amanda's students dug into Ann Rockley and Charles Cooper (Rockley and Cooper 2012), JoAnn Hackos (2006), and others who championed the move to topic-based authoring, XML, and DITA. These students graduated ready to help workplace teams transition to content management approaches that saved money (particularly on translation) while also improving clarity and consistency.

Now, in 2016, Amanda's reading of industry blogs and listservs, along with her attendance at recent conferences, has left her feeling she must again refresh her approach to advanced professional and technical communication. She must incorporate content strategy, a movement that

asks technical communicators to look beyond producing ever-cheaper technical documentation that optimizes reuse to a more complete integration of their work with that of others across the enterprise (e.g., marketing, corporate communication, and training). This line of thinking isn't new: Rockley, Pamela Kostur, and Steve Manning argued for breaking down these organizational silos back in 2002 (Rockley, Kostur, and Manning 2002). But new tools and organizational priorities have made desiloing more practical and urgent than ever, and technical and professional communicators have a unique opportunity to take a leadership role in these changes.

But on a random Tuesday in October, where should Amanda start? Content strategy is still so new that definitions are in flux: it was just four years ago that Scott Abel and Rahel Anne Bailie's (Abel and Bailie 2014) *The Language of Content Strategy* attempted to codify content strategy terminology, and most articles and postings still begin by defining key terms. The first step, then, in any attempt to help students wrap their heads around the possibilities of content strategy, is to situate content strategy within the larger discourse. In what follows, I suggest how Amanda can provide students with some principles, guidelines, and ideas that can help them begin to grasp content strategy. I close with a call for the sharing of ideas and best practices that can help our classroom work begin to provide the guidance many students need as they enter contemporary technical communication workplaces.

ASSIGNING FOUNDATIONAL TEXTS

In pulling together her initial lesson plans on content strategy, Amanda quickly discovers there has been an imbalance in content strategy discussions. Until very recently, content strategy was confined almost solely to nonacademic venues. A 2013 survey of TC practitioners rated content strategy as the single most important development in the field (Andersen et al. 2013); despite the widespread currency of content strategy in industry since around 2009 (Andersen and Batova 2015), very few academics ranked content strategy as having any importance. And while there has been some useful work specific to the teaching of content management (Evia, Sharp, and Pérez-Quinones 2016; McShane 2008; Robidoux 2008), very little has emerged on how content strategy, which requires a broader understanding of organizational goals and processes than does content management, should best be taught to future communicators.

Fortunately, for those just getting started with content strategy, there are ample resources available from practitioners, and academics

are beginning to provide alternative, peer-reviewed perspectives (cf. Andersen 2014; Hart-Davidson 2009), including two new edited volumes of *IEEE Transactions on Professional Communication*, both of which will be available by the time this volume is published. Amanda and her students will find the following texts particularly useful in learning what content strategy is, what it isn't, and how it might require some rethinking of the relationship of technical and professional communication to other fields:

1. Ann Rockley and Charles Cooper (Rockley and Cooper 2012): *Managing Enterprise Content: A Unified Content Strategy*. Nine years after the original volume, this second edition provides key updates, including new definitions of content strategy and a focus on the now-critical concept of intelligent content.
2. Kristina Halvorson and Melissa Rach (Halvorson and Rach 2012): *Content Strategy for the Web*. Because it focuses heavily on marketing and web-based communication, Halvorson and Rach's work provides a critical counterpart to the TC-focused work highlighted in the other recommended works.
3. Scott Abel and Rahel Anne Bailie (Abel and Bailie 2014): *The Language of Content Strategy*. This book will make more sense after a reading of Rockley and Cooper, which provides an essential conceptual backdrop that helps ground the definitions in this text.
4. Rebekka Andersen and Tatiana Batova (Andersen and Batova 2015): "Component Content Management: An Integrative Literature Review." This article provides a peer-reviewed, academic, comprehensive synopsis of all the relevant literature on component content management; in the process, it includes a very useful synopsis that contextualizes content strategy.
5. Dave Clark (2016): "Content Strategy: An Integrative Literature Review." In my piece, I build on Andersen and Batova's work by providing a comprehensive synopsis of content strategy as an emerging method; in particular, I explore and differentiate key definitions of content and content strategy.

DEFINING CONTENT STRATEGY

So what *is* content strategy? As Amanda's students will discover, it is difficult to provide a simple answer. There are multiple definitions, further complicated by the fact that definitions from web-intensive marketing strategists have a different emphasis than do those from technical communicators. As Abel (2013) suggests, "We lack a common understanding of the term. Content strategy means different things to different people.

And the differences in definition often are a matter of vantage point. It is not uncommon for those who come from the technical communication world to think of content strategy differently than those who hail from marketing, PR, user experience, information architecture, or mobile interaction design. As a result, confusion abounds” (14).

It is just this confusion that led to the production of *The Language of Content Strategy*, which defines content strategy as “the analysis and planning to develop a repeatable system that governs the management of content throughout the entire content lifecycle” (Abel and Bailie 2014). This definition is helpful in that it gives a sense of *scale* to the content strategy project (very large) and in that it emphasizes process and life cycle over any particular technology. Beyond that, it’s a pretty abstract definition, and it’s difficult to know what is included and what is left out.

It is helpful to consider some additional definitions to get a more complete picture of what is involved in content strategy. Ginny Redish (2012) is speaking of web-only content strategy in this quotation, but it nonetheless nicely captures what is new and unique about content strategy: “Following good practice in clear writing, let’s turn the two nouns into a verb phrase: Content strategy = thinking strategically about your content. Thinking strategically means that instead of letting everyone post whatever content they want when they want with whatever messages they want, all the content on your website is part of your overall business plan” (37).

The final clause here is critical. Content strategy, at its heart, is about connecting formerly ad hoc or isolated departmental processes to the overall business plan of an organization. As such, content strategy is a unique opportunity for technical communicators, marketers, and PR specialists to better anchor their activities to the bottom line of the business. This kind of business relevance has been a goal for technical communicators for decades.

CONTENT STRATEGY: LINKING CONTENT TO ORGANIZATIONAL GOALS

And there are still significant opportunities for content specialists to help develop new efficiencies and business relevance for professionals who write. Technical communication (and marketing and publishing) instructors must prepare their students for a working world in which they will be expected to work within and contribute to a content strategy. It’s not a change that will necessarily come easy to those of us who, like Amanda, have a long history in technical and professional communication. As a

field, we have been in transition from traditional, book-style publishing for at least two decades; the software startups I worked in during the late 90s were moving aggressively into single sourcing their documentation in order to optimize potential reuse across different media, even though we still produced print documentation. Today, few technical communicators continue to produce print content, but multimodal publishing is more critical than ever as devices and contexts for writing proliferate, so communicators have continued to rely on new tools and develop new methods for producing and managing content. At the same time, technical communicators (like those in other fields) are under continual pressure to do more with less while simultaneously better justifying their contributions in terms of the organizational bottom line.

“Content management,” which a few years ago was suggested as the technical implementation of “knowledge management” (Clark 2002), was the best answer we had in the 2000s. Content management itself came in a number of varieties (Clark 2008), including web content management and enterprise content management, and technical communicators particularly latched onto component content management (CCM). In CCM, writers use topic-based authoring, moving from the linear structure common in books to modular chunks that can be reused in other documents and modalities. Topic-based authoring in TC is often structured using a standard like the Darwin Information Typing Architecture (DITA) and implemented using a proprietary or off-the-shelf content management system (CMS) that stores topics in an open standard like XML.

Properly tagged with metadata, topics can be easily rediscovered, reused, and repurposed, all without additional writing or revision. In fact, rewriting is actively avoided; a topic composed with reuse in mind can be used across multiple documents and can thus save significantly on translation costs. For example, a well-executed topic-based guide for installing a printer might reuse, say, 75 percent of its content in the manuals of an entire suite of printing products. Those topics, then, need not be retranslated each time, and writers and translators can focus solely on what is different among the printers.

Component content management has drawn interest from academic writers, who have published critiques of how it reconceptualizes rhetorical tasks (Bacha 2008; Clark 2002; Williams 2003), explorations of how it alters the field (Andersen 2011; Clark 2008), and explorations of the practitioner articles and research that suggest the potential changes we can expect in the careers of students (Andersen 2014; Hart-Davidson 2009). Meanwhile, workplace practices have evolved very quickly. As technical

communicators, marketers, bloggers, journalists, and public-relations specialists have engaged with emerging tools and techniques that allow for better enterprise-wide repurposing, richer metrics for measuring content success, and intelligent content, the content management of just a few years ago is now thought of as one small piece of a larger movement toward a global content strategy that encompasses all phases of content life cycles and allows for a richer discussion of interactivity.

MAKING CONTENT STRATEGY CONCRETE

Even with these definitions of what content strategy is and is not, it remains difficult to imagine what it is that a content strategist actually *does*, and that understanding is pretty important to being able to teach the methods and processes critical to the role. This diagram from Joe Gollner (2013), who blogs as the Content Philosopher, helps position content strategy appropriately in relation to other, better-defined activities (see fig. 4.1). Fundamentally, developing a strategy means systematically roping together acquisition, which incorporates the planning, designing, and creation of content; delivery, which includes the selection and assembly of content to meet user needs; and management, which includes database technologies and much of what we have always considered content management in technical communication. Finally, content engagement includes the development of feedback and social media mechanisms to involve stakeholders (readers) with the content.

In all cases, it is worth noting that content is, epistemologically, envisioned as a static thing to which management or engagement is applied, despite the emergence of intelligent content, which suggests autonomy but actually means content properly structured and tagged so as to be useful in a strategy that relies on reusing and adapting existing content to new contexts. The content isn't intelligent; it has a wrapping that allows us to use it intelligently.

But let's get even more pragmatic. If we hope to prepare students for content strategy work, we must have a solid grasp on what content strategists actually do. As I discussed earlier, there is precious little content strategy work from academics and/or in peer-reviewed publications, and much of what is out there (in industry publications, on blogs, and in popular-press books) is driven largely by establishing definitions and laying out the groundwork of the practice.

Still, examining some of the core texts of the field can be instructive in laying out some key principles, principles we must embrace in our teaching if we're going to properly prepare students for the world

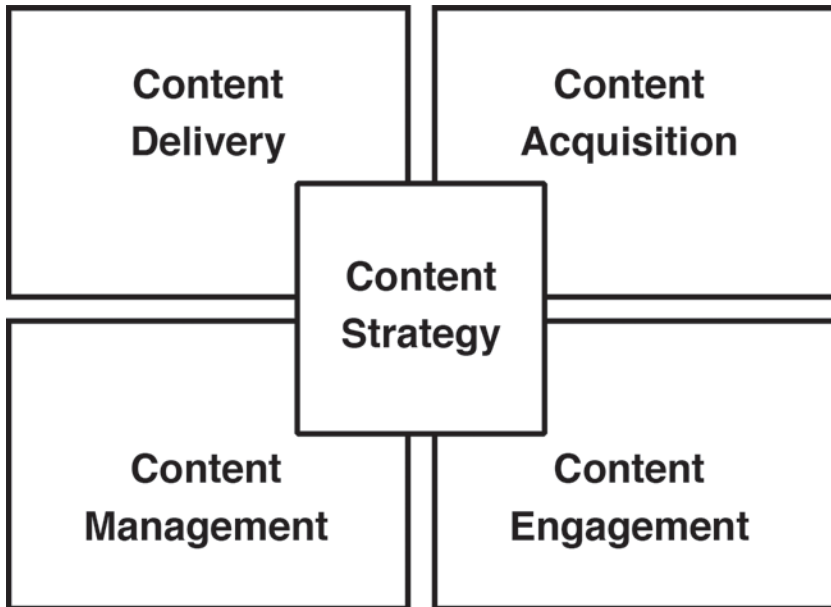


Figure 4.1. Content Lifecycle Model (Collner 2013)

of content strategy. Many of the key texts seem remarkably similar in their approaches, which does provide some confidence that we're getting a reasonably comprehensive picture of the central activities. In assembling this overview of principles, I relied on Rahel Anne Bailie and Noz Urbina (Bailie and Urbina 2013), Sara Wachter-Boettcher (2012), Meghan Casey (2015), Kristina Halvorson and Melissa Rach (Halvorson and Rach 2012), Kevin Nichols (2015), and Rockley and Cooper (2012).

- **Content must be concretely aligned with business requirements.** Content strategy disrupts the traditional model of content as an ancillary, late-in-the-process user manual or brochure. Content strategists work proactively to align their work with the larger business goals of their organizations. Early in any content strategy initiative, strategists conduct a content audit, a process in which they determine whether their existing content meets the needs of their many internal and external stakeholders; a thorough audit assesses all organizational content in order to ensure it is achieving what it should for the good of the enterprise and establishes metrics for measuring future success.
- **Content is more collaborative and inclusive than ever.** An important initial goal of any content strategy initiative is break down silos (like traditional department and job boundaries) that impair content sharing and lead to unnecessary duplications of effort. In content strategy,

the content life cycle is the responsibility of everyone in the firm, and we broaden our understanding of content to include not just text and visuals but also information architecture and project management. In addition, we expand the scope of content to include texts that may have previously escaped notice, like product packaging, call-center support scripts, employee portals, and compliance information.

- **Content cycles and workflows must be carefully planned and implemented.** After strategists have identified all the producers, stakeholders, tools, and cycles, they must develop comprehensive methods for determining and modeling how content is produced, reused, managed, and delivered and must also manage the organizational change required to implement such a system. In doing so, they must strive to create *repeatable* systems that optimize efficiency and quality.
- **Content strategy requires a nontrivial array of new methods and tools.** Designers and users of a content strategy can often expect changes to the ways they write, store, share, and reuse content, both in terms of the methods and flows and in terms of the tools they are expected to use. Content strategists must have a good understanding of the available options and also must anticipate resistance and struggles for, say, writers required to move from a linear, hand-crafted model of content production to a topic-based authoring environment.

These content strategy basics tend to evoke one of two responses from technical writers. Experienced, senior writers often say, “I’ve always done all of this! I didn’t know I was a content strategist.” Less experienced technical writers ask, “Where is the writing?” My students most often fall into the second category. Many of our professional and technical writing students have switched into our program from another, less obviously pragmatic humanities program and are hoping to get a job in which they can simply write and edit as they have been trained throughout their schooling: individually, and without the pesky ties to larger business processes.

To these students, content strategy is an unwelcome intruder, insisting they learn countless new tools and methods and radically overhauling their perceptions of their futures. Some students, particularly the type who plan to be business analysts or project managers, take to this kind of work immediately. From some other students, we can expect some resistance. At least part of the task before us, then, is to persuade students of the importance of learning about content strategy. While all students who have graduated into roles in technical writing have learned XML, DITA, topic-based authoring, and other techniques on the job, if they are not given a bird’s-eye view of the overall content strategy of their organization, they will be greatly delayed in their ability to contribute to company efforts at a higher level.

ASSIGNMENTS

Amanda and others new to content strategy should begin with assignments that, at least initially, are conventional in their writing and design, as students struggle to understand new concepts. At first, the goal should be establishing the importance of and demystifying content strategy, making it less abstract than it can seem after simply reading one of the many textbooks.

The Applied Literature Review

To establish the importance of content strategy, bringing in industry guest speakers can be useful and eye opening, particularly for students who have a more conventional liberal arts background. But what can be even more helpful is requiring students to explore just how different the mainstream practitioner discourse about content is from anything they will see in academic journals or textbooks. Asking students to conduct and report on the contemporary discussions of technical communication and marketing content can give them a strong sense of just how much they have to learn. Some possible topics for exploration:

Value

How does content strategy impact discussions about how content specialists argue for the value of their work to their organizations? Ten to twenty years ago, technical communicators relied on metrics such as reduced call volume and more amorphous topics like customer satisfaction. What new options does content strategy make possible, and how might they shape the future of content in the enterprise?

Sources

How does discourse about content take shape in different media? Examine published texts, listservs, blogs, advertisements, and conference programs and proceedings. How are the sources, genres, and authors of work on content strategy shaping the discourse, and what does that shape suggest about future needs and directions for the discussion?

History

How has technical communication discourse about content shifted in the past ten years? Twenty years? What new organizations, thought leaders, and alliances have emerged? What kind of work is less privileged as a result? What do these changes suggest about the future place of technical communication as a profession?

The Needs Assessment, Content Inventory, and Content Audit

The available texts on content strategy offer substantial, helpful guidance on how communicators can best assess their information infrastructure as an initial step toward developing a content strategy. Students can select a small organization to study, such as a student organization or their home academic department, and then they should conduct and report on the full range of what is available. There are three key phases:

- **Needs Assessment.** It is impossible to perform a content audit without a detailed assessment of organizational and stakeholder needs. As Rockley and Cooper (2012) note, the key is determining what your customers (internal and external) really need. To pull together this information, students should interview stakeholders across functionalities; marketing, documentation, sales, and other segments of the enterprise perceive different needs. Rockley and Cooper offer an excellent guide to help students get started, with an emphasis on identifying pain points that suggest areas for improvement. Nichols (2015) offers a particularly helpful breakdown of questions related to business and project strategy goals.
- **Content Inventory.** The content *inventory* is, as Nichols suggests, a complete list of all of an organization's content and content processes; the intent is not to evaluate but to simply uncover all the different kinds of content available to and produced by the organization and how they are produced. Students should develop charts and follow best practices from one of the many sources (Nichols is a good one) on how to systematically present the complete list, broken down by ID, title, genre, description, functionality, purpose, metadata, and so forth.
- **Content Audit.** Now equipped with an understanding of organizational needs and a comprehensive list of content options, students can conduct an *audit*, which assesses the content *inventory* in light of stakeholder *needs*. Fundamentally, the purpose of the audit is to assess the quality, rhetorical appropriateness, tone, and so forth in terms of customer needs. What content is doing its work effectively? What content needs to be improved? What content doesn't yet exist and should be created? What content can be reused? What existing processes could be improved, streamlined, revised, eliminated?

The Tool Training

Not every student will be persuaded of the use of learning XML and structured authoring tools, and I don't advocate a technology-heavy approach to teaching content strategy. Tools change frequently, and the sorts of tools required for a corporate-style content strategy can be cost prohibitive to many universities (although it's worth noting that there are countless open-source alternatives to industry-standard tools like Arbortext and MadCap Flare). I strive, instead, for students to

understand the range of options available to them and develop *conceptual* understandings of the potentials of topic-based authoring, XML, intelligent content, and data-driven reuse systems.

An effective method for assessing student understanding is a simple topic-based authoring project. Working with one problem or opportunity identified in their analysis of the content set in the previous project, students develop a paper-based prototype for a solution, a solution that includes identifying the relevant tools and methods and, when applicable, a breakdown of how those tools will be employed in resolving the identified issue. For such a project, there are many available prototyping tools (at this writing, Balsamiq and InVision are among the most popular) that allow students to create clickable mockups that can be shared and tested digitally, allowing for the rapid accumulation of testing data.

The Content Strategy

Having shown their understanding of auditing and tools (and having received substantial feedback on their work thus far), students are prepared to develop the initial steps toward an overall strategy for tackling the content ecosystem of their identified organization. It's important to note that a full content strategy involves many more components and much more complexity than would be possible to take on in a single report project or in a single semester, so our goal here cannot be a complete plan but can be a reasonable structure in which students can note strengths, weaknesses, and known omissions. The report they produce should, at minimum, include the following key elements, some produced earlier in the semester:

- before and after diagrams of the content ecosystem;
- the analysis of business and stakeholder needs;
- the content audit, identifying pain points and contradictions between stakeholder needs and existing content and content practices (the full content inventory should be included as an appendix);
- lists of content types (genres);
- workflow diagrams;
- notes toward the creation of a content model, tool infrastructure, style guides, and all additional materials needed for a complete rollout of the strategy.

THE RHETORICAL REFLECTION

Finally, the students should be asked to reflect on their accomplishments. What are the strengths and limitations of their content strategy

plan, and what are the strengths and limitations in their own understandings of how content strategy can work to improve an organization? How has the project made them think differently about their place in an organization's communication efforts? And, do they believe their content strategy could help an organization to better succeed?

These assignments, ultimately, are *reports* intended to challenge students cognitively in terms of their content and also challenge their burgeoning abilities as writers of technical content. Still, there is obviously a limit to how much students will gain from this arm's-length approach to content strategy, and an ideal approach might include a second semester of content strategy, or an internship in which students would get their hands dirty with more real content and encounter some of the real problems that crop up in the less ideal world outside their scenarios.

CONCLUSION

There is no question that we need more research into content strategy; as I discussed in the introduction to this chapter, there has been virtually no empirical or peer-reviewed work on content strategy despite the existence of a massive and growing practitioner literature. There has been even less work into best practices for helping students make the conceptual and technological leaps from a more traditional understanding of text production into content strategy. And we need better bridging materials. Sarah O'Keefe and Alan Pringle's *Technical Writing 101* (O'Keefe and Pringle 2011), for example, is a frequently used text for introducing students to the profession of technical writing (as distinct from the many technical writing texts aimed at students who will be writing technical information as engineers or scientists), but it contains only a single chapter relating to topic-based authoring and XML. Their *Content Strategy 101* (O'Keefe and Pringle 2012) volume, on the other hand, like many content strategy texts, best fits the needs of current professionals rather than students.

I have found that the incoming goals of students are different than they were even a few years ago. I have seen a distinct downturn in the number of students in professional and technical writing who hope to edit mystery novels or work in the magazine industry; the message that these fields are troubled and offer few opportunities seems to be getting through. And increasingly, students are placing into a wider array of job types than ever before; our most recent graduates are in writing roles as diverse as corporate communications, public relations, project management, business analysis, and social media. Technical writing is not the clear, singular path it once was. Content strategy is, in some ways, the

perfect evolution for contemporary practice in technical communication in that learning about content strategy gives students a broader and yet more nuanced understanding of organization-wide communication.

DISCUSSION QUESTIONS

As you discuss the emergence, importance, and practicalities of content strategy with students, the following kinds of questions will be important to helping them situate it within the history and ongoing evolution of technical communication.

1. How does content strategy reconfigure the work of technical communicators? How has the day-to-day work of a technical communicator changed over the last twenty years? Over the last forty?
2. In what ways does content strategy enable greater alignment of technical communication goals with the goals of an enterprise? In what ways will technical communication continue to be challenged by the idea that it can be easily outsourced and/or that it's an afterthought in the larger mission of the organization?
3. In what ways does content strategy challenge the traditional work of technical communicators? Consider the growth of alternative organizations and the shrinking of the Society for Technical Communication. What new competencies are now required to be an effective technical communicator? Is technical communication even the same field?
4. What additional research do we need in order to understand the implications of content strategy for the larger workforce, let alone for technical communication?

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