

REEF

REEF Content Audit Report and Update

March 2021

- 01** Content audit report and recommendations
- 02** Documenting our nomenclature
- 03** Resourcing recommendation
- 04** Progress
- 05** Copy examples
- 06** Next steps

Content audit

**No matter what product we design, we
should always design a conversation
between a product and its user.**

Audit summary

The Assignment

Conduct a content audit of REEF Cloud and Mobile, specifically at language used and information provided, and develop a strategic approach to content that will dock into Unification efforts.

Objective

Identify content issues and uncover common themes

Define recommendations delivering relevant content with consistent and clear language content throughout REEF's ecosystem.

Outline an approach that will proactively circumvent content-related barriers and prevent user abrasion.

Recurring themes



Nomenclature



Style



Governance



Resourcing



Comprehension

Audit details

Inputs

- Stakeholder interviews with product owners
- Working sessions with designers on each module
- Product designs within Figma and Invision
- Documentation in Confluence and Sharepoint
- User testing sessions (limited)
- Deep dive of design system

Assessment criteria

Is the information relevant for what the user needs to do at that point in time?

Is the flow of information and content in a seamless and meaningful order?

Is the terminology and information succinct, clear and consistent?

Key insights

Recurring themes and issues



Nomenclature

The terms we use and how we use them are confusing and vague to stakeholders, designers and users.



Style

The absence of a copy style guide has led to widespread inconsistencies in how information is written and presented.



Comprehension

The purpose or function of modules and/or their components is not clear due to vague copy and information gaps.



Governance

Content preference is subjective, and creation happens in silos without oversight.



Resourcing

Content strategy and copywriting needs outweigh current bandwidth and require additional resourcing.



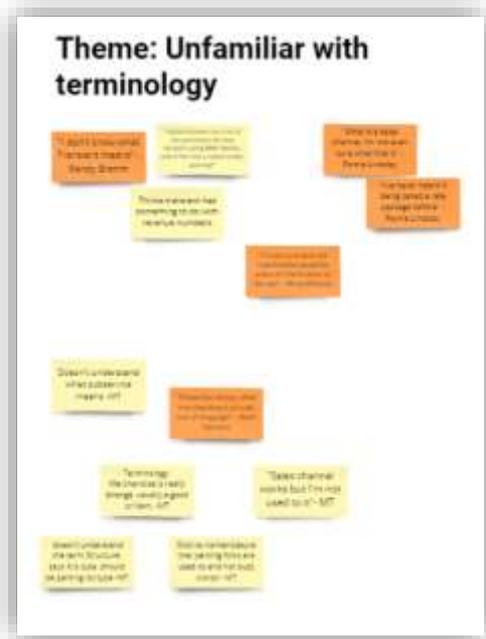
Key Insight - Nomenclature

The terms we use and how we use them are confusing and vague to stakeholders, designers and users.

Ex. Storefront user testing

What is a "sales channel"? I'm not even sure what that is.

I don't know what "transient" means.



I don't know what "subservice" means.



Key Insight - Style

The absence of a copy style guide has led to widespread inconsistencies in how information is written and presented.

Capitalization

Create Rate

+ NEW RATE PACKAGE

Define rate package Manage rates Manage fees Test rates

Favorites Recently Viewed Shared

Date format

Active period

Apr 2, 2021

Dec 31, 2021

Does not expire

Effective Date

01 Mar, 2021

Expiry Date (Optional)

01 Jun, 2021

● Approved
2/21/21 • Jane Doe

● Rejected
2/21/21 • Franky L.

Special characters

Step 2

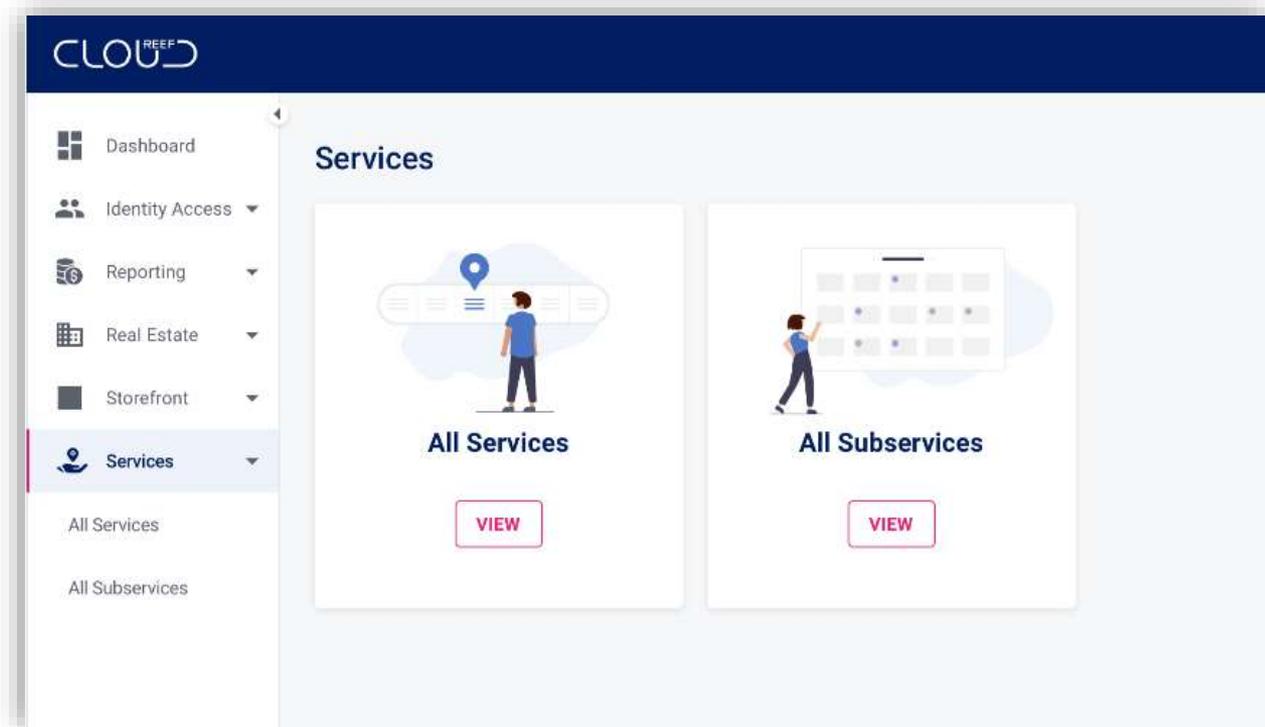
**Sales Channel
and Rate Package**

Administration & Support



Key Insight - Comprehension

The purpose or function of modules and/or their components is not clear due to vague copy and information gaps.

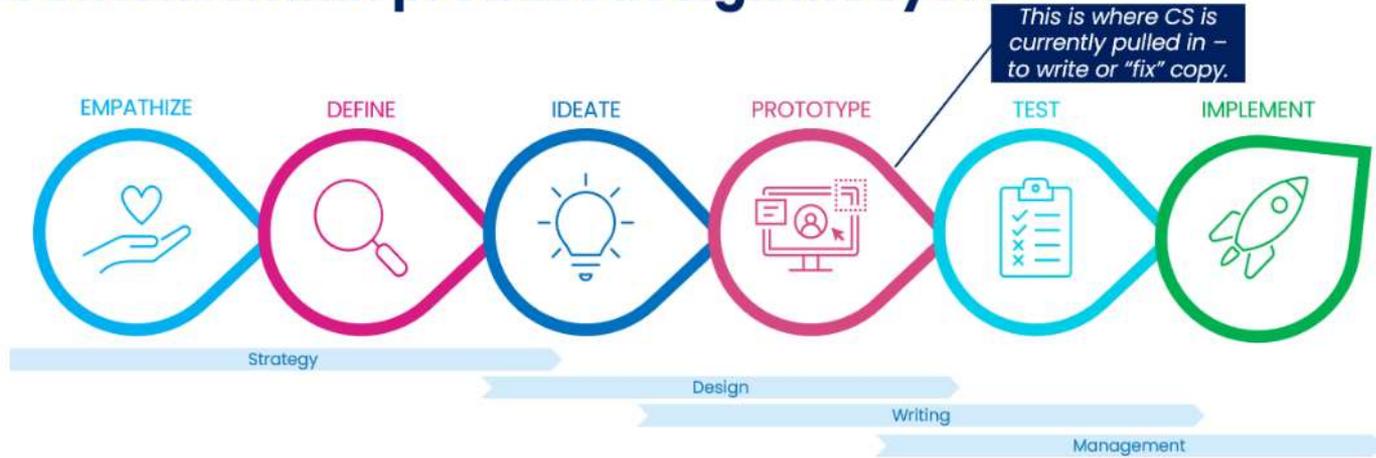




Key Insight - Governance

Content preference is subjective, and creation happens in silos without oversight.

Content within product design lifecycle





Key Insight - Resourcing

Content strategy and copywriting needs outweigh current bandwidth and require additional resourcing.

Current content backlog

Deliverables

- ✓ Audit report
- ✓ Standards documentation (glossary, terminology and taxonomies, style guide)
- ✓ Governance model
- ✓ Copy request and review process
- ✓ Socialization and training
- ✓ Module-by-module updates to align with new standards

Active copy requests

- ✎ HMT
- ✎ Financial Reporting
- ✎ Pricing
- ✎ Mobile Gated Parking
- ✎ Lead Gen/Intake Forms
- ✎ Emails - Identity Access and Mobile

Identified needs

- ✎ Product story overhaul - TBD
- ✎ Goodees
- ✎ Full copy audit of new design
- ✎ Email messages in new template
- ✎ Customer Acct Portal
- ✎ Content organization and copy

Addressing the gaps

Recommendations



Put clear definition to the language and terminology we use and how we use it and codify it for product adoption.



Develop a content style guide that will serve as our source of truth and dock into the new design system.



Show empathy and that we understand user needs with content that provides clear information and guidance.



Institute lifecycle and oversight of content process, as well as the adoption and adherence to new standards.



Add additional resourcing to fulfill content needs across Cloud and Products.



Recommendation - Style

Develop a content style guide that will serve as our source of truth and dock into the new design system.

The screenshot shows a web page from the REEF Cloud Design System, specifically the 'Capitalization' section of the 'Content Guidelines'. The page has a dark header with the 'CLOUD' logo and navigation links for 'Principles', 'Content Guidelines', 'Foundations', 'Mockups', 'Organization', 'Templates', and 'BRI'. Below the header, there are tabs for 'Capitalization' and 'Brand Voice'. The main content area is titled 'Capitalization' and includes the following sections:

- Introduction:** States that sentence case is used within the design. It explains that readability is reduced with all caps because all words have a uniform rectangular shape, making it difficult for readers to identify words by their shape. Therefore, the system is very conservative when capitalizing.
- Avoid using all caps/uppercase or title case:** Explains that sentence case looks casual, clearer, and more readable. People spend more time skimming, and sentence case makes it easier for them to read. It instructs to capitalize the first letter of the sentence (and any proper nouns).
- Case types:** Provides three examples:
 - Sentence case:** This is proper use of sentence case.
 - Uppercase:** NOT THIS WHICH IS UPPERCASE OR ALL CAPS.
 - Title case:** Or This, Which is Called Title Case.
- Exceptions:** States that there are a few exceptions to the sentence case rule, which apply where the REEF Cloud Design System requires them in order to emphasize hierarchical importance or urgency of message.
- When Title Case is OK:** This section is partially visible at the bottom of the page.

At the bottom of the page, there is a 'Universal navigation' bar with various utility icons and a search field.



Recommendation - Comprehension

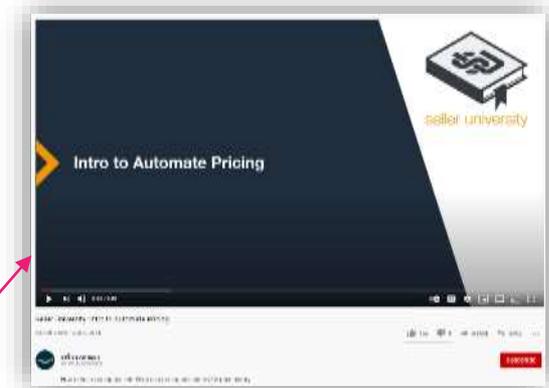
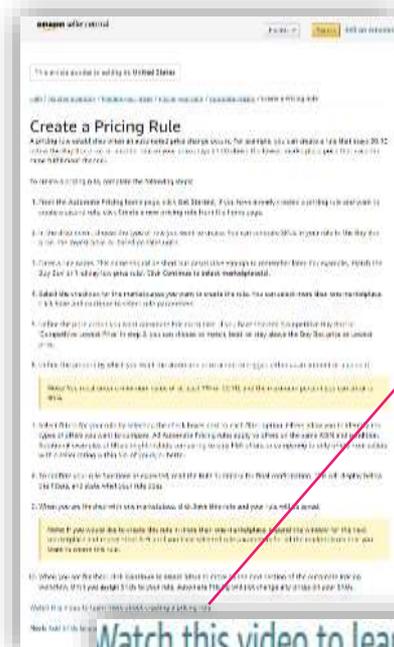
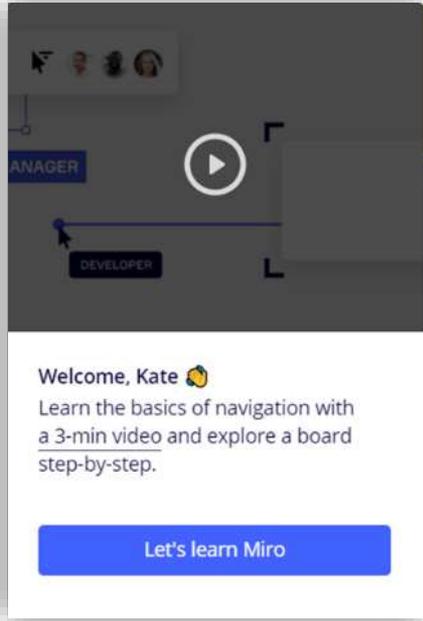
Develop getting started content and module how-to's



Miro uses interstitials when it recognizes a new user.



Amazon seller central has a detailed how-to videos to accompany some of the more complex aspects of its products



<https://www.youtube.com/watch?v=btS45RGqEec>

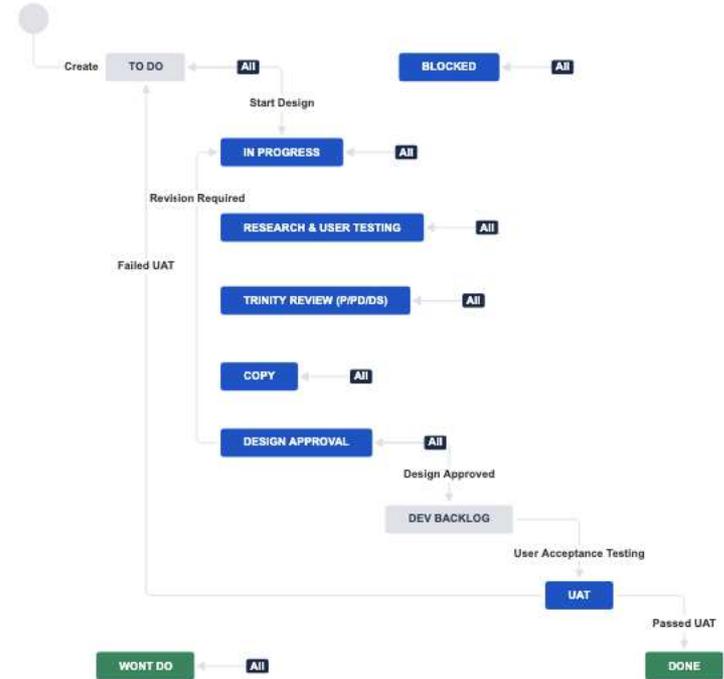
Watch this video to learn more about creating a pricing rule



Recommendation - Governance

Institute lifecycle and oversight of content process, as well as the adoption and adherence to new standards.

Content within product design lifecycle





Recommendation - Resourcing

Add additional resourcing to fulfill content needs across Cloud and Products.

1

Start with a copywriter who can support growing copy requests and execute against new content standards.

2

This will also allow for content strategy to be involved further upstream in the design process and be more efficient.

3

Assess in Q3 to ensure resourcing and bandwidth is supporting content requirements.

Progress update

YTD achievements

Work done in parallel with audit

Since late January:

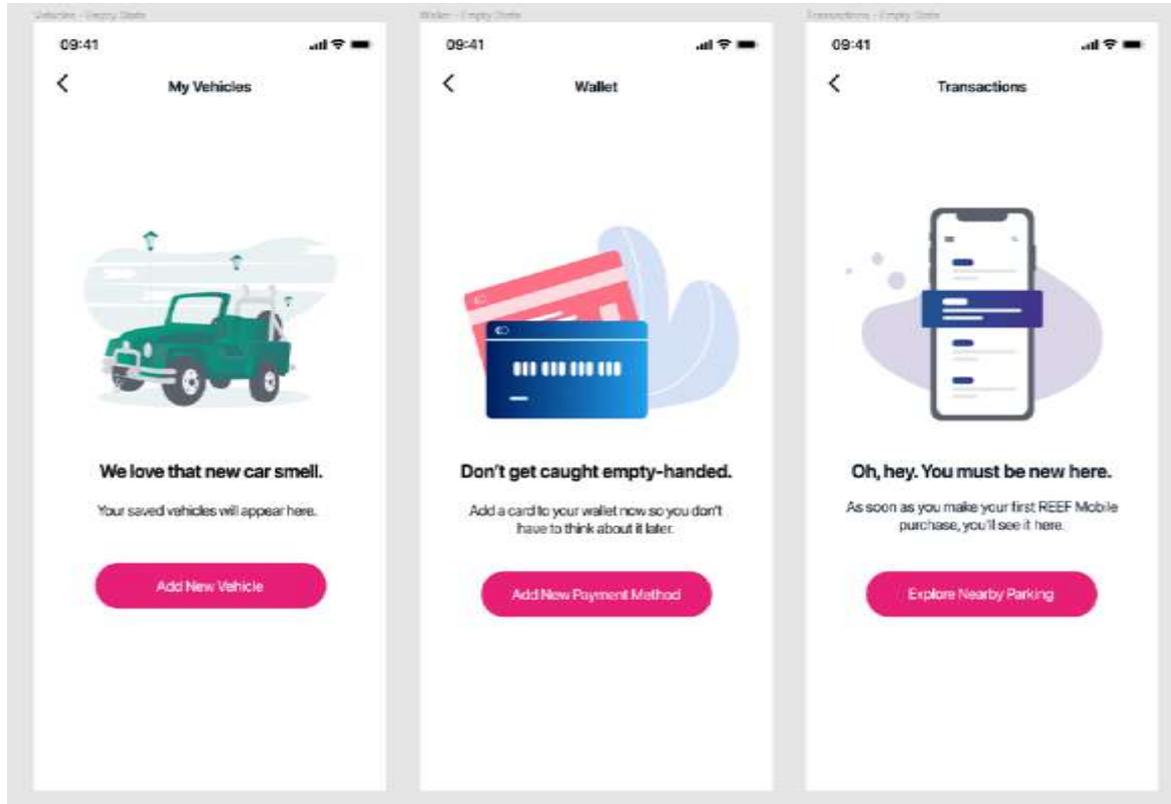
1. Completed persona audit, recommendations and standard content elements
2. Research and recommendation for HMT renaming
3. Navigation labels for card sort and revised labels for Unification
4. Style guide - Capitalization section completed
5. Full audit of Service Configuration Module and delivered copy revisions, taxonomy and terminology
6. Copywriting across all modules (varying levels of scope)*
 - Financial reporting
 - Welcome to REEF Cloud
 - Mobile (in process)
7. Email writing

* See before and after copy examples

Before & After

Copy examples

Mobile empty states



REEF Cloud welcome email

From: no-reply@reeftechnology.com <no-reply@reeftechnology.com>
Date: Monday, January 4, 2021 at 9:28 AM
To: Randall Abele <randall.abele@reeftechnology.com>
Subject: Welcome to REEF Enterprise

Welcome to REEF Enterprise

You have been added to REEF Enterprise network.

[JOIN NOW](#)

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We built REEF Cloud to enable efficiencies, simplify how we do business, and drive growth and innovation at scale - for REEF and for our business partners.

You now have access to this hub of proprietary capabilities and applications that connects REEF properties, products and services, and uses technology and data to propel businesses forward.

[Explore REEF Cloud](#)

REEF

reeftechnology.com

Please do not reply to this email. Emails sent to this address will not be answered.
REEF Customer Service can be reached via email (sms@reeftechnology.com) or phone (800-444-0444).

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Pricing engine subheads and microcopy

CLOUD

Storefront > Merchandise > Create Merchandise > Add Rates

Rates

Market: Springfield, Australia (Local PK)

Define Rate Package

Name of Package

USD

Map Price on REEF Mobile (optional)

Prices are tax inclusive for all rates in this package

SAVE AND CONTINUE

Manage Rates

Manage Fees

Test Rates



CLOUD

Storefront > Merchandise > Create Merchandise > Add Rates

Rates

Market: Springfield, Australia (Local PK)

Define Rate Package

Package nickname

Default rate shown on REEF Mobile

This is the rate that REEF Mobile users will see for your location in map view

or 34/10

Select currency

USD CAD

Prices are tax inclusive

Prices you set will include taxes

Yes No

Make this a shared package

Any shared rate package can be used across multiple locations

Yes No

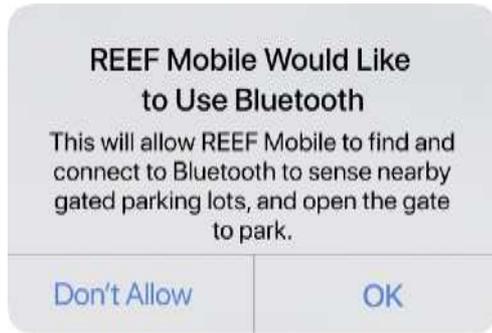
SAVE AND CONTINUE

Manage Rates

Manage Fees

Test Rates

Mobile Bluetooth permission copy



- 01** Align on recommendations, validate activation priorities and socialize
- 02** Complete v.1 of glossary, common terms, taxonomy
- 03** Style guide outline and v.1
- 04** Conduct full update on Unification designs
- 05** Map out governance model

Appendix

Detailed findings and insights

Theme	Insight	Detailed Insights
Nomenclature	The terms we use and how we use them are confusing and vague to stakeholders, designers and users.	<p>Our terminology - what we call certain things and how we define them - is a large source of confusion. Stakeholder interviews and design work sessions reveal that there isn't a shared alignment on this, and user testing demonstrates a clear disconnect. If we don't understand the meaning of something, how will our users?</p> <p>REEF's language is complicated:</p> <ul style="list-style-type: none">• A lot of our terminology wasn't developed with the end user in mind. It has origins in back-end requirements and developer vernacular.• A common accepted POV is that certain terms in question are industry standard or used for a capability that may or may exist in the future.• Similar words are used for related and vague concepts<ul style="list-style-type: none">• Ex. pricing, rates, rate package; services and subservices• Some glossaries exist, but source, adoption and management are unclear• One concept may have synonymous terms and multiple spellings <p>Finally, there are some terms that are consistent barriers to understanding and task completion, like Merchandise, Subservices, and Configuration</p>
Style	The absence of a copy style guide has led to widespread inconsistencies in how information is written and presented.	<p>There's no overarching guidebook for how to create content and copy. Therefore, style has been left to the POV of the individual responsible (who may or may not be a writer themselves). Examples of style missteps and inconsistencies include:</p> <ul style="list-style-type: none">• Voice and tone misaligned to REEF's established brand voice.• Inconsistent use of capitalization and case incorporates a mix of all caps, title case and sentence case.• Irregular use of hyphenation• Varying date formats• When and how ampersands are used

Detailed findings and insights

Theme	Insight	Detailed Insights
Comprehension	The purpose or function of modules and/or their components is not clear due to vague copy and information gaps.	There's somewhat of an assumption that the user will know what to do when they get to a module. Page headers and helper copy are vague or don't provide full context of what the user is viewing or expected to do. Information that addresses questions like "What is this page for?", "How does this module work?", and "Why am I being asked for this information?" is ambiguous or doesn't exist.
Governance	Content preference is subjective, and creation happens in silos without any oversight.	Lack of governance is one contributor to the content issues that exist. Just as there is governance and process in design, so should there be with content. Right now, there are no rules for what content is created, how it's created and how it's approved. Critical missing pieces include: <ul style="list-style-type: none">• Standards - including style guide, brand voice, glossary (for writers and non-writers alike)• Process - when and how to engage content strategy and copy into the design process, as well as prioritization• Roles - defined roles, responsibilities and scope of frequent tasks and projects• Review process - who reviews and approves content and the criteria used
Resourcing	Content strategy and copywriting needs outweigh current bandwidth and require additional resourcing.	Supply \neq demand. Existing strategist is straddling two roles - strategist and copywriter - and the workload is there for at least one of each. For example: <ul style="list-style-type: none">• Bandwidth does not allow for content to be involved upstream in design projects (which is ideal). This results in non-writers creating content and writers being pulled in to "fix" copy at the 11th hour, which can take longer than writing the copy.• Delivery of content audit report was delayed several times so that the one strategist could pivot to immediate strategic and copywriting needs.• There's a pervasive backlog of copywriting. Currently there's an estimated 80 hours of copywriting work in the queue, which grows every day.• The criticality of Unification and growth of areas beyond REEF Cloud require focus on content strategy.• Finally, the need for content support was a recurring topic in stakeholder interviews.

Detailed recommendations

Theme + Key insight	High-level recommendation	Detailed recommendations
<p>Nomenclature: The terms we use and how we use them are confusing and vague to stakeholders, designers and users.</p>	<p>Put clear definition to the language and terminology we use and how we use it and codify it for product adoption.</p>	<p>Documentation to include:</p> <ul style="list-style-type: none"> • Glossary of REEF vocabulary • Common terms playbook for frequently confused/misused lingo • Taxonomies to show organization and relationship of terminology
<p>Style: The absence of a copy style guide has led to widespread inconsistencies in how information is written and presented.</p>	<p>Develop a content style guide that will serve as our source of truth and dock into the new design system.</p>	<p>Style guide should include elements like:*</p> <ul style="list-style-type: none"> • Direction on applying REEF's brand voice • Rules for capitalization, punctuation, hyphenation, number formats • Character counts for flexible content areas • Content patterns on recurring content types
<p>Comprehension: The purpose or function of modules and/or their components is not clear due to vague copy and information gaps.</p>	<p>Show empathy and that we understand user needs with content that provides clear information and guidance.</p>	<p>We shouldn't assume the user knows what we know so we should anticipate their needs.</p> <ul style="list-style-type: none"> • Apply clear labeling and tool tips • Create a user-facing glossary that is easy to access • Develop getting started content and module how-to's (Examples)
<p>Governance: Content preference is subjective, and creation happens in silos without any oversight.</p>	<p>Institute lifecycle and oversight of content process, as well as the adoption and adherence to new standards.</p>	<p>Governance includes glossary, playbook and style guide, in addition to:</p> <ul style="list-style-type: none"> • A defined process, including integration of content roles throughout the design lifecycle • Rules for planning, creation and reviews • Socialization including purpose, application and use cases
<p>Resourcing: Content strategy and copywriting needs outweigh current bandwidth and require additional resourcing.</p>	<p>Add additional resourcing to fulfill content needs across Cloud and Products.</p>	<p>Start with a copywriter who can support growing copy requests and execute against new content standards. This will also allow for content strategy to be involved further upstream in the design process and be more efficient. Assess in Q3/Q4 to ensure resourcing and bandwidth is supporting content requirements.</p>

*List is not exhaustive and will grow.

Documenting our nomenclature

Recommendation

Put clear definition to the terminology we use and how we use it and codify it for product adoption.

Elements

- Glossary - Preferred REEF vocabulary and definitions
- Common terms - Detailed reference document for frequently confused/misused lingo and proper terminology
- Taxonomies - Visual map of terminology organization and relationships

Considerations

Implications on work led by Marketing and REEF University and cross-functional adoption.

Documentation example: Glossary

Term*	Definition
Sales Channel	Marketplace where products can be sold (e.g., REEF Mobile). Synonymous with Storefront.
Rate Plan	Individual rate (Ex. transient parking at \$1/hr)
Rate Package	Collection of rate plans. A rate package is valid for either a market or specific location and is associated to an individual piece of merchandise (e.g., Transient Parking at 145 Oaks St) and a sales channel (e.g., REEF Mobile)
Merchandise	Product to be sold (e.g., a monthly parking permit, transient parking)

* Work in progress. For illustrative purposes only.

Additional detail

~90 terms identified so far

Numerous existing glossaries

Including Real Estate, Storefront, Pricing, Kitchens and Financial Reporting

Not consistent or complete and will require reconciliation

But they should be combined into the master glossary.

Will also account for capitalization rules.

Documentation example:*

Common terms (“use this, not that”)

Old Term	New Term*	Definition	Rationale
Service	Services	<i>Formal definitions are TBD - needs copywriting resourcing</i>	<ul style="list-style-type: none"> • “Services” double meaning is confusing • “Services” is the umbrella term • The “services” (subservices) are organized into “service categories” (services) <ul style="list-style-type: none"> • As in, “REEF offers 25+ services across 8 categories.”
Service Type	Category	<i>Formal definitions are TBD - needs copywriting resourcing</i>	<ul style="list-style-type: none"> • Often used interchangeably with “Service”
Subservice	Service	<i>Formal definitions are TBD - needs copywriting resourcing</i>	<ul style="list-style-type: none"> • This is an internal term, but not intuitive and could cause confusion with users. • Used interchangeably with “Subtype,” “Microservice,” “Sub-service”
Effective Date	Service start date	Date when a location/structure begins to offer the service	<ul style="list-style-type: none"> • Voice • Clarity
Expiry Date	Service end date	Last date when a location/structure will offer the service	<ul style="list-style-type: none"> • Voice • Clarity
Structure/Structure Name	Structure type	<i>Reuse definition from Real Estate</i>	<ul style="list-style-type: none"> • Standardization and context • Broader categorization versus implying a single structure at a single location
Configure (v.) Configuration (n.)	Set up Business rules	<i>Will define when configuration flow is finalized.</i>	<ul style="list-style-type: none"> • Technical term that isn’t necessarily widely understood outside of developer groups

Additional detail

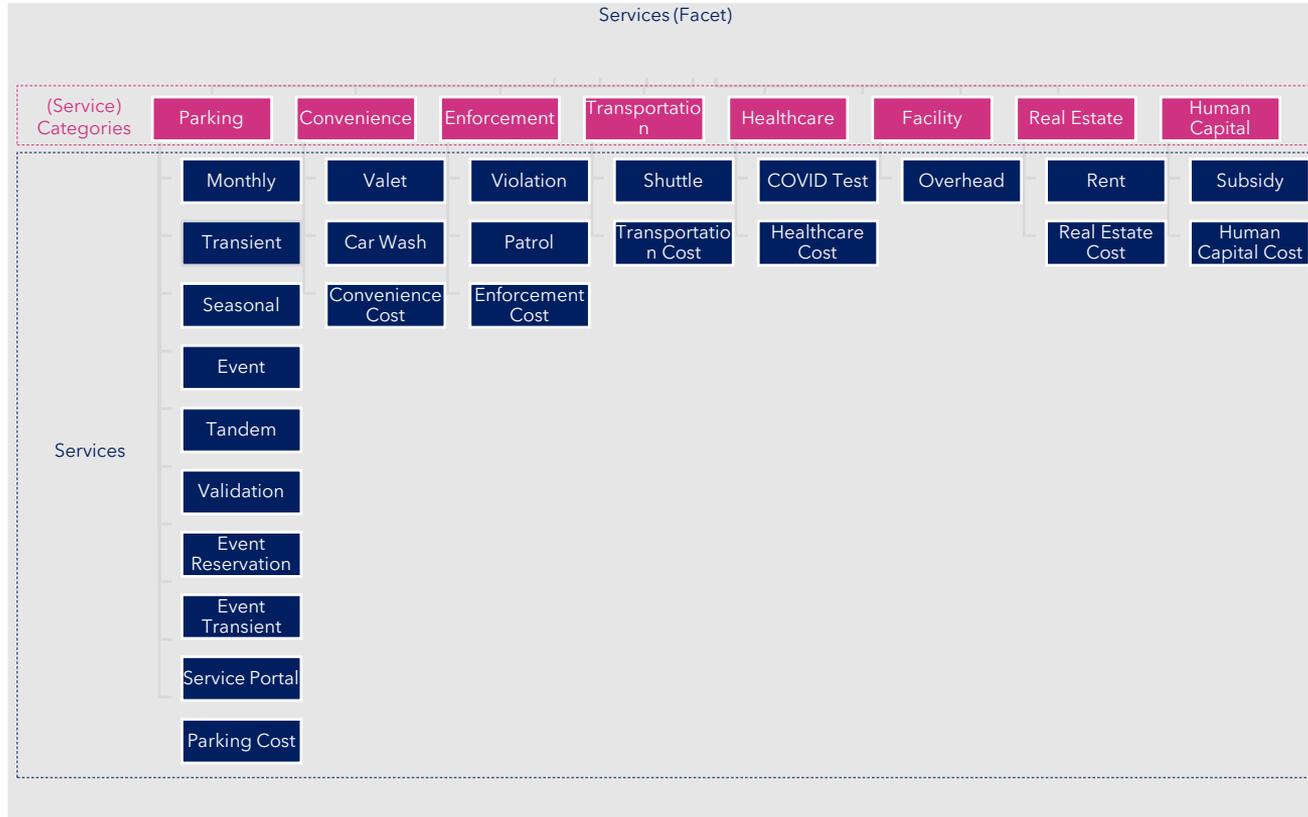
User testing will be critical input going forward

Essential terms include:

- Transient
- Rates
- Configure
- Merchandise
- Payment

* Work in progress. For illustrative purposes only.

Documentation example: Taxonomy



Additional detail

Taxonomies proposed:

- Storefront and pricing
- Parking
- User types
- Kitchens
- Goodees

Resourcing

Staffing model

Insight:

Content strategy and copywriting needs outweigh current bandwidth and require additional resourcing.

Recommendation:

Add additional resourcing to fulfill content needs across Cloud and Products.

Start with a copywriter who can support growing copy requests and execute against new content standards.

This will also allow for content strategy to be involved further upstream in the design process and be more efficient.

Assess in Q3 to ensure resourcing and bandwidth is supporting content requirements.

Content Strategist

Sets strategy
Standards and governance
1-1 consultation with designers
Support UX testing
Marketing liaison
Ongoing assessment
Ad hoc copywriting (full list under UX writer)

From

To

Content Strategist

Sets strategy
Standards and governance
1-1 consultation with designers
Support UX testing
Marketing liaison
Ongoing assessment
Complex copy support

UX Copywriter

Day-to-day copy lead
Proactive copy support
UI
Alerts and errors
Headers and subheads
Empty states
Buttons
Email
Tool tips
Naming conventions
Labels

Content backlog

Current deliverables

- Audit report
- Standards documentation (glossary, terminology and taxonomies, style guide)
- Governance model
- Copy request and review process
- Socialization and training
- Module-by-module updates to align with new standards

Active copy requests

- HMT
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Identified needs

- Product story overhaul - TBD
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- Full copy audit of new design
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- Content organization and copy