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## CTRL+CLICK CAST #047 – Content-First Design with Steph Hay

[Music]

**Lea Alcantara:** You are listening to CTRL+CLICK CAST. We inspect the web for you! Today we are talking about content-first design with content strategist Steph Hay. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

**Emily Lewis:** Emily Lewis!

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[Music ends]

**Emily Lewis:** Before we introduce our guest and get to today's episode, we want to once again remind our listeners to [vote for us in the 2015 Net Awards](#).

**Lea Alcantara:** Yay! [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Yeah, for the third time.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And thanks to your support. Not to mention the support of our sponsors and partners, we are up for Podcast of the Year.

**Emily Lewis:** And once again, we need sound effects. [Laughs]



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**Lea Alcantara:** Yeah, I know. That's why I was trying to do my best Oprah impression there.

[Laughs]

**Emily Lewis:** [Laughs] Is that what that was? Okay, so voting is open until July, and we'll have the link in our show notes so let's get to today's topic, which is content-first design. Our special guest is Steph Hay. Steph leads Capital One's content strategy team and also runs their weekly design sessions for 160 people across ten locations. She's also a mentor at 1776 and 500 Startups. Welcome to the show, Steph!

**Steph Hay:** Hey, thanks for having me.

**Lea Alcantara:** So Steph, can you tell our listeners a bit more about yourself?

**Steph Hay:** Yes, well, maybe I should start with the fact that this week, ladies, I am buying a house for the first time.

**Emily Lewis:** Oh, my gosh, wow!

**Lea Alcantara:** Awesome, congrats.

**Steph Hay:** [Laughs]

**Emily Lewis:** I'm looking for a house, so are you already in the process of like they've accepted your offer and you're going to closing?

**Steph Hay:** Okay, yes.

**Emily Lewis:** Oh my gosh.

**Lea Alcantara:** Huh!



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**Steph Hay:** I should say I, as in we, my future husband who I have been with for seven years, we've been looking for five years.

**Emily Lewis:** Oh my gosh.

**Lea Alcantara:** Wow!

**Steph Hay:** And after obsessively watching HGTV in every hotel room I've ever been in, because I don't have cable... [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** I'm now in the throes of having gone through the inspection and I'm waiting to find out what the fix and not fix so that we can have an agreement and go toward closing, which will be July 15<sup>th</sup>, if all goes well.

**Emily Lewis:** Oh wow!

**Lea Alcantara:** Wow!

**Emily Lewis:** Well, good luck. I tell you what, but I've been looking for just a month. We've been house-hunting for about a month and it's incredibly stressful. I've already put in two offers and had those go. They didn't turn out. I have a third offer in right now, and I'm not sleeping. [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** [Laughs] So you're waiting to hear back, and this is the most tedious time for you then, right?



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**Emily Lewis:** It's the worst, because you want to like dream about what you're going to do because we're intending to get a fixer upper, but I mean, our offer hasn't been accepted. We're in a negotiation, I guess. So it's the more nebulous of the process, and then it gets to what you're at, the inspection stuff where it's also nebulous because you don't know what they're going to find and what you're going to have to eat or what.

**Steph Hay:** Right.

**Emily Lewis:** This is not fun. I know it's going to pay off in the end, but I don't like it myself.

[Laughs]

**Steph Hay:** That's right. We were looking out over three weeks, and if it goes well, then we're going to be very happy. If it falls through, we're still going to be very happy, but it will be another house someday, but so far, it's been a pretty exciting week.

**Emily Lewis:** Oh wow, that's really exciting. Oh, I'm excited for you.

**Lea Alcantara:** Great time of the year. [Laughs]

**Steph Hay:** Yeah. [Laughs]

**Emily Lewis:** So are you buying in Virginia?

**Steph Hay:** Yes, in Falls Church.

**Emily Lewis:** Oh, well, that's right near where I was born and grew up.

**Steph Hay:** Where were you born?

**Emily Lewis:** Alexandria.



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**Steph Hay:** Okay, so that's where I live now.

**Emily Lewis:** Oh.

**Steph Hay:** And I have lived for the last 12 years.

**Emily Lewis:** Yeah, I grew up on a Van Dorn and Franconia, the corner of that in the townhouses there.

**Steph Hay:** You are kidding me.

**Emily Lewis:** Nope. [Laughs]

**Steph Hay:** I live in Franconia. [Laughs]

**Emily Lewis:** So we really live in a small world. [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** Okay, I live at the corner of... well, it doesn't matter. It's like who's going to listen to this. I don't want to tell them where I'm living. [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** Anyway, we'll talk about that after this podcast.

**Emily Lewis:** Awesome, good. So let's talk a little bit about content strategy. I mean, your job title is content strategist, so like what is content strategy?



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**Steph Hay:** It's different depending upon where you are. So I'm going to give you the answer of where we are here at Capital One, which I joined last September after five years on my own as an independent contractor.

**Emily Lewis:** Oh wow, what made you make that decision?

**Steph Hay:** It was too good to pass up to be a part of something that's so cool as this.

**Emily Lewis:** [Laughs]

**Steph Hay:** I've been able to start a team focused on the kind of content strategy I get really excited about, which is designing products with content, and that experiences too and the kind of conversations that we want to have with people through the interface and actually thinking about the kind of conversations we want with them to have about us, with their friends and family when they're getting there on the street showing you, "Hey, check out what Capital One just did." I want to be a part of forming that conversation. So for us, content strategy is designing experiences that feel like personalized conversations, and we do that using words.

**Emily Lewis:** It sounds like it's about connecting.

**Steph Hay:** That's exactly right, and especially in a regulated industry, the challenge was too great where you don't think about your bank as your best friend. [Laughs]

**Emily Lewis:** Right.

**Lea Alcantara:** Right.

**Steph Hay:** You don't necessarily even trust that your bank is giving you all of the information that you need. In fact, there are some articles. There was one that came out a couple of weeks ago from

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TechCrunch where the author said, “The reason we’re trusting the Simple(.com)s of the world is because they speak our language.”

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Right.

**Steph Hay:** And that’s a clear opportunity for someone like me and my team of nine folks who are really interested in speaking the language of our customers to take advantage of. If our company is brave enough to use that same language, which Capital One is and that’s why I’m here, then we’ve got a real opportunity to make the kinds of experiences that I haven’t in my career had an opportunity to make at this scale, and it’s such an incredibly emotional intersection of people and their money.

**Emily Lewis:** Yeah, with banking, I mean, you want to feel comfortable with your bank on a whole bunch of different levels, some of which are human and some of which are monetary and trust based and you want them to be serious, but also it’s got to be a very difficult line to walk.

**Lea Alcantara:** Approachable, but serious.

**Emily Lewis:** Serious...

**Lea Alcantara:** Yeah.

**Steph Hay:** That’s right, and what you are actually doing right now is thinking about things in the way that we as a content strategy team within the larger design organization, we’re actually within the product design team, that’s the way we’re thinking about it, which is it’s very contextually specific how we are going to talk to you because we have to know who you are, what kind of language you use, what you’re trying to do, how long you’ve been a customer with us, and on and on. I mean, the



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variables are almost endless to be able to design the kind of conversation that will feel like we have anticipated you and are responding to you and know you.

**Emily Lewis:** And it sounds super client focused, but I guess also the goals have to ultimately tie back to Capital One.

**Steph Hay:** Exactly.

**Emily Lewis:** You've got to make those people happy too, you know? [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** Right, so you're talking about the balance between being customer focused and still having to run a business, right? [Laughs]

**Emily Lewis:** Yeah, exactly.

**Steph Hay:** Luckily, the company, I mean, this is a big opportunity of why I decided to join. I mean, I was definitely not looking for a job, and that's another story I suppose we could get to, but DNA, Capital One in particular, is to be customer first.

**Emily Lewis:** [Agrees]

**Steph Hay:** To really apply design thinking methodologies that are empathy-driven methods to our design process, to our product development process, so we start with a need of the person and then we say, "Okay, this is what people need. How does this map to the business versus this is what the business needs, how do we find people to take advantage of that? How do we sell to them?"

**Emily Lewis:** That reminds me of – I don't know if you're all familiar with Whitney Hess, but we had her on the show last year talking just about that, that bringing humanity back to the business, which is

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focusing on what the customer, your customer, your audience wants and needs and having your business respond to that rather than the other way around.

**Steph Hay:** Exactly, and it's funny that you say that too, because bringing humanity to the language of banking is what our urge is. [Laughs]

**Emily Lewis:** [Laughs]

**Steph Hay:** Like that's what we are here to do as a company.

**Lea Alcantara:** So how does that entire like, well, human-first, customer-focused decision making fit into content first and content-first design, like how does that even work?

**Steph Hay:** Yeah, so a couple of ways in particular, we are really lucky enough to have daily testing sessions for a whole variety of different things that we are prototyping or planning to release to market at different stages of their development process. So in testing on a daily basis from a content perspective, we'll have a content strategist who's sitting in these empathy interviews with customers or with people who might not be customers yet, but might be interested in being customers. We'll have a content strategist sit and listen to how people talk about the problems that they have with any sort of money-related issue at all, and most of the time, by the way, it's not even about the money. The money is the enabler.

It's about their lives. So a woman whose husband just died and he had been managing the finances their entire lives. Somebody who has got to fit in college who's about ready to graduate and she wants her kid to have a credit card and learn how to start using credit wisely. This is the kind of daily conversations that people across the company are having with real people, and our content strategists can sit and listen in on those and will be exclusively focused on the language that people



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use to talk about the problems that they have or the goals that they have in their lives, because without that laser focus, without that specialty, what happens as we all know when we're focused on a whole lot of things is that we end up inadvertently moving to overly formal language or passive language. We start to categorize things because that's what humans do by nature is to say, "Well, this person kept using the word 'money,' but we're going to use the word 'funds' instead."

**Timestamp:** 00:10:02

Suddenly now we just added a layer between us and the reality of the language that people use to talk about their lives and, in particular, in relation to money and so our team can sit in those interview session on a daily basis and keep themes real and keep themes real with their language that they're putting in the interface, with the language that they're using with each other when they're talking about design so that as an entire company we start speaking the language of our customers rather than adding formality to it.

So that's one of the ways that we're working and for the end-to-end experiences that are already out there, we'll see, "What is the person trying to accomplish when he or she signs in? Knowing what we know about this particular customer, if we walk from end to end and we try to read out loud all of the things that we put in front of this person, does it sound like a conversation, A, we want to be in, and B, they want to be in with us, [laughs] and C, the kind of conversation that is really going to connect with them, that really helps them get done with what they need to get done and shows them that we're a partner to them, and if the answer is no, we can do better.

So our team really tries to separate design and layout and channel and all of the things that are structure related that often conflate whether or now we're actually connecting to the person in



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language by coaching the designers and the product leads and the business analyst to thinking about all of the experiences as conversations.

**Emily Lewis:** And is that something that you said that a content strategist can sit in on these sessions?

**Steph Hay:** [Agrees]

**Emily Lewis:** Does that involvement of sort of guiding and keeping the team focused on that realness, the right language, that sort of thing, is it throughout everything, or is it just sort of in the beginning as you're gathering the keywords, the language?

**Steph Hay:** Right.

**Emily Lewis:** But does it go into when the developers writing code or if there happens to be some sort of back-end development or the QA like where does content strategy sort of begin and end in the whole process?

**Steph Hay:** Great question. I have a slide actually when I'm talking about this with different teams who are new to content strategy and I'm really proud of this animation because I'm a content person, I'm not a designer, but in Keynote, I have a slide that says, "All the dang time." [Laughs]

**Emily Lewis:** [Laughs]

**Steph Hay:** And it animates by shaking. [Laughs] And I'm really proud of the animation. That's the way content strategy fits in all the dang time.

**Emily Lewis:** [Agrees]



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**Steph Hay:** So in the beginning, it becomes really imperative to get everybody speaking the same language so that we can work better as a team and so that it manifests itself into the interfaces or mechanisms through which we're communicating to customers and it doesn't ever get to the point where the designer is thinking, "Okay, we should put a headline here. Now, is there a copywriter to fill in the blanks?" Because the designer had been working with the content strategist right from the very beginning to understand that if you think a headline should go there without thinking about what it should actually say, that's actually structure over content, and so it's shifting the mindset to say, "Okay, Designer, you're designing this interface, what is the conversation that should be here?"

So, that they're actually thinking content first along the way. If they state that precedent, what ends up happening is a really great trickle-down effect through the development process where suddenly the developer who's always had a bad rap because, for example, an error message that doesn't have any language attached to it, he or she has to fill it in so the thing will shift.

**Emily Lewis:** [Agrees]

**Steph Hay:** And then suddenly the content strategist or the designer or whomever says, "Wait, how did this get out to production because this isn't the kind of language we want to use?" It's like, well, yeah, because nobody wrote it for this person.

**Emily Lewis:** Right.

**Steph Hay:** Nobody. This person was disconnected from the design process. This was an afterthought. This was a fill in a blank, so it's not a surprise that that's how it reads. So if everybody is part of the design process up front, and that includes the developers to be part of those initial interviews to hear the language that people are speaking, to understand what the conversation is



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going to be, that reflects itself through the design process, through the interactions so that, A, more error messages can be prevented.

Like we can actually prevent them because we know how the conversation is going to go. We don't design the interface first and say, "Oh, somebody could get in this dead end here. We've got to put an error message. We just design so that there's no dead end." And then secondarily, when we do have those sorts of error messages, there's already a tone established as part of the application that feels like natural human language, and so nobody is trying to meet some expectation of formality, they're just writing the language that meets for that particular use case.

**Lea Alcantara:** So all of this that you're telling me just sounds amazingly great.

**Emily Lewis:** I know.

**Lea Alcantara:** And ideal, okay?

**Steph Hay:** [Laughs]

**Lea Alcantara:** It sounds ideal, but I'm sure most of our listeners will say their team or their situation or their company or whatever, they don't have quite maybe the buy in or the knowledge to know how to go through a content-first strategy content strategy.

**Steph Hay:** [Agrees]

**Lea Alcantara:** So how would you introduce something like this in that type of context?

**Steph Hay:** I know it sounds idealistic to say if you could write an email, you could do content-first design, but it is true. I think what surprises people is that doing content-first design doesn't require



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copywriting or Journalism degree. It requires a bravery on behalf of whomever is doing it to be willing to be boring.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Steph Hay:** I mean, like real is boring, man. I mean, real is raw and honest and transparent and a lot of times it doesn't sound flashy.

**Emily Lewis:** [Agrees]

**Steph Hay:** It doesn't make promises it can't keep. It just is what it is, and that's actually what builds trust. When you say you're going to do something and then you do it, you actually exceed expectations because so few people do that. So few people are willing to say what it is that you are going to get in reality. They want to make it sound a little better so that you're in truth when you come in or they want to make some promises and everything promises to be quicker, faster, easier than ever before, more awesome, and rarely it is.

So you're already working against two things. One is that a general population feels disillusioned by the promises that they're made all the time. The second thing is, anyway, that sets an expectation on the people designing these experiences that they have to come up with the right language to really like engage someone.

**Emily Lewis:** Right.

**Steph Hay:** If you know who you're talking to and you have a real conversation right away, that is the most engaging and most trust building way to have a conversation with someone. So content-first

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design means primarily being willing to speak the language that is required of building trust with somebody which is very real, boring language for the most part and it doesn't mean it can't have a sense of humor, it doesn't mean that it can't have a personality, but it just means removing a lot of the pressure we put on ourselves to make something sound a certain way. If we can get there, what ends up happening is you don't feel like you have to sell the idea, you just do the work.

You say, "What are we trying to do here? If we have to design this entire experience in a Google Doc, how would it go? What is the conversation? How would it start? Where would it go? What "if then" statements do we run into along the way? Let's start designing almost like a choose-your-own adventure book where we just stick to the words because no matter what your specialty is, everyone can read and participate in that level of a discussion. Words are our common denominator. Language and communication in that way is our common denominator.

Only when we have actually all arrived that this is actually what we're trying to design, this is the kind of conversation we want to have with somebody, this is where we would want to lead them if they showed us this degree of interest, then we can actually move to structure and channel and visual, those sorts of stuff that will bring that conversation to life. So I want to be clear though that we've started this journey nine months ago in Capital One, an organization of more than 40,000 people, on a design team of a 140 within a larger digital organization that has products in different product owners and different priorities.

So it isn't flick the switch on and go, it is a constant learning curve for everyone, including us, about how we can jump into the middle of a process and start to change the focus away from what are the new features that we're going to add here to what is the conversation that we're already having with people based on this existing experience. Who would want the feature? How would we talk about



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this? When would we show it to them? To move it more toward from this UX perspective to textual relevance conversation versus just a “let’s build it because we can” conversation.

**Emily Lewis:** So you guys have been doing this, you mentioned I think for about nine months. Was this shift towards this direction prompted by anything? It just seems to me having worked in really large organizations that it can be difficult to have. This sounds kind of like non-traditional marketing, and it’s just to me not the marketing that I have had with the teams that I’ve worked in because it’s all about someone says, “XY needs to be done.”

The marketing people are like, “Oh yeah, yeah, we’ll get it done,” and they write some copy about all of that. Not once have we considered the audience that we’re trying to connect with. It’s just crank out materials, crank out things, prepare these advertisements and such, and that’s a huge shift. I mean, that’s how marketing has traditionally been done at least in my experience, especially in these really big organizations.

**Steph Hay:** [Agrees]

**Timestamp:** 00:19:53

**Emily Lewis:** So do you know why that shift sort of occurred, or how you could kind of encourage that same mental shift within maybe our listeners that may be within their employer’s environment or with a client that they’re working with?

**Steph Hay:** Yeah, speed. That’s why this shift is happening, speed to market.

**Emily Lewis:** [Agrees]



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**Steph Hay:** To be competitive as a large organization, we cannot afford to optimize for a waterfall production environment when it comes to experience design. I mean, experience is brand. Experience is marketing. Experience is our product. It's all interrelated, and with the speed at which so many companies have been able to get to market using open source, using APIs to create billion dollar companies that have disrupted huge industries. This is the Ubers and Airbnbs of the world, right?

**Emily Lewis:** [Agrees]

**Steph Hay:** This is impossible to ignore.

**Emily Lewis:** [Agrees]

**Steph Hay:** It is to the peril of companies that choose to who think, “I will just reduce my risk by making this linear process even more linear.” This can’t happen. There has to be a self-organization around great ideas that is focused on validating that you’re on the right track at every stage.

**Emily Lewis:** [Agrees]

**Steph Hay:** Only by setting up those market forces, even in a big company that already has scale, an infrastructure, if you set up the right conditions to mimic those market forces, that’s how innovation happens, and so we were really lucky. Our content strategy team did a few years ago Evelyn Huang out of Stanford d.School joined Capital One to establish a design thinking practice within the design team to start orienting the various stakeholders around the company toward the idea of needs of people first-design, “Let’s start with the needs of people, iterate quickly, validate ideas, prototype, prototype, prototype, release to market, test and learn, and go.”



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We come in and say, “Okay, needs of people on one side, needs of the business on the other.” It’s almost like a Venn diagram. The overlap is growth. Well, then the way people talk about their needs and the way we as a business talk about those same needs, if we use the same language, the overlap there is faster growth because we’ll have the right conversation right from the get-go. So it’s a combination of the company recognizing that to compete, we have to be a software company, we can’t be a bank and combine that with investment, huge investment in APIs and in the design thinking practice and a content strategy and a whole bunch of other forward-leaning techniques and methods and technologies that we’ve been able to get to this point where the company understands experience design and the needs of an experience design. We’re not there yet, but we are on our way.

**Lea Alcantara:** Well, the thing I’m concerned about, I mean, it sounds excellent and great, and then you mentioned that speed is one of the driving forces of content-first design and less of a linear approach, but I feel like some hesitation is that content-first design actually will introduce more time as opposed to speed, especially we’re in the client services here where we do work with small businesses. In our experience, sometimes the delay is due to the client dragging on getting the content addressed.

For example, basically, once I get the direction and the content, I can design and get it done, but until I get that content, nothing happens. So how do you make that efficient? How do you make content-first design not delay anything? What happens if the client or whoever it is on your team or in your company holds something up in terms of content?

**Steph Hay:** Now, you’re talking about the content strategist here.

**Emily Lewis:** [Laughs]



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**Lea Alcantara:** Yes, yeah.

**Steph Hay:** Okay, I've always been on the receiving end of designs that don't support the content because of that exact reason.

**Lea Alcantara:** Right.

**Steph Hay:** Let's design a design, let's structure a design and then let's plug in the content.

**Emily Lewis:** Yeah, right.

**Steph Hay:** Same thing with the CMS, let's design a content management system. Let's architect the whole thing, and then let's try to actually put data in it.

**Lea Alcantara:** Right.

**Steph Hay:** So this doesn't work. This is you just said, it holds up launches even.

**Lea Alcantara:** Yeah.

**Steph Hay:** And then when it launches, man, have I worked with a ton of designers who are disappointed at what they ended up spending the last several months creating because the fanfare of what it could have been never reached that epic level because of the content.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Right.

**Steph Hay:** It's very easy to get distracted by the shiny new. So if you forward, you push forward the biggest challenge which is the content, what are we actually trying to say, how are we going to say it, and the client never gets you content, what's the problem? What do they really want? Do they want

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a design? Because if they want a design, redesign and just use their existing content. Then if they want a better website, if they want a better experience, if they want a better product, they have to work in tandem and the subject matter expert, the person who knows the customer on the other side of the interface, the person who knows their business, that person has to be brought into the fold early in the process.

So I'm going to use an example of when I was consulting working on Ben & Jerry's website redesign. This is a company now running independently within Unilever. They've been acquired by Unilever, so they have a lot of different people at the table who have a lot of different requirements for what the Ben & Jerry's brand and what their new website should be, and I was working with a really fine folks at Happy Cog on this as a subcontractor. There were a lot of people in the room. How can we all talk about what this should be? Well, traditionally what would do is say, "What do you want the new website to have?" And we go through a laundry list of features, and somebody said, "Okay, let's get into Google Doc." I'm going to lead a little content workshop here during the kickoff meeting that it goes something like this, "Hey, everybody around the table, tell me what the top three questions that your customers ask are. Tell me what the top three things that they complain about are."

**Emily Lewis:** [Agrees]

**Steph Hay:** Now, already the IT person, the PR person, the marketing person, the product person, they're all going to have different answers, but they're about the content that represent the opportunity we have to actually communicate with the person across the other side of the interface in a better way. Then I'll say, "Okay, now tell me what your answers to their questions are or tell me how you resolve their complaints." Again, now we're starting to show that, "Hey, people are calling in with this question a lot and we actually don't give them an answer. There's nowhere to find it or it's



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buried in the website. Well, geez, wouldn't it cut down on a lot of calls on you if we actually made that a more prominent part of the conversation? Yes, great, so now we already have hierarchy happening."

So if we spend our time early on, focus on getting the content, even if it's just happening around kickoff meeting, put in a Word document, put in a Google Document that everybody can contribute to, what naturally happens is a structure starts to emerge just out of the hierarchy of the conversation, and then the designer can start to see, "Okay, this is the kind of conversation we're supposed to be designing for." So he or she can actually move much more quickly. Even when it comes to something like an interaction versus just like a standard marketing website, and again I use the Ben & Jerry's example, why did people come to Ben & Jerry's? Well, it's because they're looking for a flavor, and not just the flavor, but where they can buy the flavor.

So what could we give them? On the Google Doc, we said, "Well, we could give them a whole laundry list of all of the different flavors. They could choose a flavor and then we could show them where the local scoop shop was if they wanted to go get it in person or we could show them where they could get it at their local grocer, the CVS down the street. Now, most of the time, you might stop there and go, "Great, we know what we need. Go ahead and design it."

**Emily Lewis:** [Agrees]

**Steph Hay:** But what does it actually mean to say, "This CVS, well, this CVS has got to have an address. The CVS might need to have a phone number. Maybe we should show hours of operation." We started about those things before there's ever a layout, before there's ever a design. We put all of those things that could be the content. Somebody needs to make a decision, in this case, to find a flavor before we ever get to design, and now everybody is participating in that Google Doc in the first



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couple of weeks of a project, so we're able to say, "Well, we know where you're located because you're using your phone or you're using your logout from your computer. At home, we know where you're located. Let's make an assumption about what that is and show you the nearest one."

All of that stuff is captured, and now we've got requirements. We've got requirements starting to come from the content, and if you go to the Ben & Jerry's website, you'll see at the very, very top of the page because this was the number one reason why people were coming, so it should be the most prominent, at the very top of the page of the Ben & Jerry's website, you immediately see a flavor finder, and that whole little widget, that whole little interactive experience was designed in a Google Doc in the first two weeks of the project.

**Emily Lewis:** I like what you're describing here because I can see it scaling down. I mean, Lea, what comes to my mind is when we have those early kickoff meetings, we ask questions like, "What are your visitor goals? What are your audience goals?" And what if we just shifted that slightly and we're like, "What are the questions your customers are asking you regularly? How do you answer?" Like just those two little shifts also...

**Steph Hay:** That's right.

**Emily Lewis:** I really could see it scaling because we're already asking some of these questions. It's just like the phrasing and what we're actually trying to get if we realize that we're actually not trying to get the business owner's idea of what their audience wants. We want the business owner to tell us what their audience is already doing with them.

**Steph Hay:** That's exactly right. That's exactly right, and what you'll notice too immediately if you try this, the business owner is able to answer that question very quickly.



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**Emily Lewis:** [Agrees]

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**Steph Hay:** There are probably a few emails in his or her inbox or voicemail messages about this. It's probably the thing that is costing them operationally. They can speak to this because this is their customer feedback loop, and so we're often so focused again on the structure and on the design and on the thing we're making that we forget that there's actually a person on the other side and at the end of the day, if none of this existed, if there's not a digital tool and there's just me and a phone, or even better yet, me in a room with another person, that I should still be able to make a sale.

**Emily Lewis:** [Agrees]

**Steph Hay:** I should still be able to have a conversation there. So it's trying to strip it back down to what is fundamentally connecting us in the first place, which is the language that we use with each other.

**Lea Alcantara:** Yeah, I definitely can see that, because even just shifting the word visitor to so what do your customers...

**Steph Hay:** That's right.

**Lea Alcantara:** Right. In the web world, it's the same thing, but in the context of who actually is visiting and what your client understands, customer makes way more sense.

**Steph Hay:** That's right, and that's one of the shifts that we've made here internally too. When we're doing our interviews, we actually ask people early on. We might, as anybody would at any company doing usability testing, show them a prototype or show them a design, and then see if they could use

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it. I mean, that is usability testing. There's something different here that's often conflated with usability testing where a red flag for me will be when the designer comes and says, "Hey, people aren't understanding this. I think we need to rewrite it, or we need to educate people and we need to put a Learn More screen." Because this is part of the design process and this is the evolution, they don't realize that the opportunity to get somebody to understand something has probably already passed. If they don't understand but can use it and it's usable, that's great.

Understandability is totally different. I even divide that further to be like understandable at the point of making competent decisions versus understandable where we can sometimes fixate to say, "Well, this person didn't understand that what this word meant exactly." But did the person understand it enough to be able to make a decision competently. If the answer is yes, so let's just keep moving then.

**Emily Lewis:** [Agrees]

**Steph Hay:** So understandability becomes a key component of a process that's a content-first process because we're focused on getting at the core truth of whatever it is that's bringing us to this interaction in the first place to make sure that we understand each other, and so what our usability testing labs has done since they've started adopting some content-first principles is say, "Before we even show them a prototype, we're going to ask people to design the kind of conversation they want to be in with us."

So we will know in the back of our minds what we've already designed, but we won't show it to them yet. We'll say, "Hey, if you ever had an experience or if you've ever had a bad experience in an ATM, tell us about that," and then they'll talk about it. We'll say, "Well, what would you rather have had the



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ATM say to you?" And man, do they take off. They love telling us exactly what they would have rather than conversation been.

**Lea Alcantara:** [Laughs]

**Steph Hay:** And if we're only brave enough to listen to it, we have just let our customers design the ideal experience and so we can draw from that and say, "Cool. Now, that they've just designed that back and forth interaction, how does that line up or not line up with what we thought the interaction should be? How should we revise our interaction so that it actually ends up being much more understandable from the get-go?"

**Emily Lewis:** So with regard to that understandability, I'm curious does storytelling make things more understandable for people?

**Steph Hay:** Absolutely. It's more trustworthy. It's more fun. I mean, actually, Jared Spool once gave me some really great advice about storytelling. He said, "Listen to the first ten seconds of any *This American Life* episode." What happened is Ira Glass, if you're familiar with it, the host will just immediately launch into a story. He'll say something like, "Mary Smith one day went to her mailbox and couldn't believe what she opened." [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** And everybody was listening. They're listening because he's already in a story.

**Emily Lewis:** [Agrees]



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**Steph Hay:** So you pay attention to that. I mean, I ask this question often. If I hear this in meetings, “Well, we need to educate the customer,” I’ll say, “Like how many of you love being educated by companies?”

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Yeah, yeah, yeah.

**Steph Hay:** So that’s a real opportunity to figure out what the real story is and to be able to tell the story, and that’s why even starting those interviews that we have with customers by saying, “Tell us the story about... or tell us about a time when...,” gets them in the storytelling frame of mind so that we can listen at the language that they use and watch their behavior change once there’s emotional trigger.

You can see their body change. You can see them lean forward when they’re really uncomfortable about that story or when they were excited about something and we’d pay really close attention to those. So storytelling is an often used phrase, especially in the marketing world, but it is and has been for centuries the very best way to convey information and connect people together. I mean, think about the beginning of our podcast when I started telling you about my home buying experience at the beginning.

**Emily Lewis:** Right.

**Lea Alcantara:** [Laughs]

**Steph Hay:** I mean, you’re basically my best friends already.

**Emily Lewis:** [Laughs]



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**Lea Alcantara:** [Laughs]

**Steph Hay:** [Laughs]

**Lea Alcantara:** Well, I mean, that's all great, but obviously not all stories work out and not all interpretations of these conversations are correct. How do you track whether or not your interpretation of these interactions and listening to your customers are successful, and if it isn't, what do you do?

**Steph Hay:** Perfect question. The level of specificity required to name a measurement. It's so great. We have to be able to be specific about what we're trying to measure in order to see whether or not it actually made a difference.

**Emily Lewis:** [Agrees]

**Steph Hay:** And so there are these sorts of, if you're all familiar, the lean methodology versus sort of vanity metrics. If we're doing marketing storytelling, that might be increase time on site or more pages per visit or something along those lines where we can at least get some baseline indicators about whether or not people are interested in this compared to our average, and the ideal would be that they would go up. At some point, I'm sure there's a law of diminishing returns.

More fundamentally, from an experience perspective or from a business perspective, we would want to know what operational costs or sales targets we could use as measures to say, "Look, we put these things into the market at this schedule for these kinds of people and then we came back two, three and four months later and we saw a decrease in call volume on these topics that we actually wrote about."



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And that might actually include telling stories of people who had really terrible experiences maybe with our products, maybe in their lives completely agnostic of our products, but to get a little real about some of the ugly underbelly of the financial industry, not necessarily us, but potentially us. What have we done in the past or what we were overlooking in the past that really didn't serve our customer in the way that we want to serve a customer, and then to be able to say, "But look, because of this, we made all these changes and now we're trying to do right. We're trying to be better."

**Emily Lewis:** [Agrees]

**Steph Hay:** There's a ton of power in that too, so being able to measure whether or not some content that we put into the world, some stories that we put into the world, made any measurable difference. It means saying, "This has to be on this time, and three months from now, we're going to come back and look at call volume or email volume and we're going to try and decrease the number of calls about this topic like login and we're going to try and increase the number of calls about something like credit card application or something like that." We have to be specific about the tests that we're putting in the market too. We can't just say, "We're publishing a bunch of content hoping that it works."

**Emily Lewis:** [Agrees]

**Steph Hay:** We have to use data, Google Keyword data or Site Search data or data from groups around the company right now who've already been doing some storytelling and say, "What does it seem to be that our customers really want from us? What's the language they're using? What are the problems that they have in their lives that we actually might be able to help them with? So with on both sides, using some data, using some hypothesis up front to create the stories and then knowing



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what we're measuring them against, so it doesn't just end up being a production cycle that we're sort of watching vanity metrics endlessly about.

**Emily Lewis:** Yeah, it makes me think we had a client who asked us at the beginning of the project, "How will I know if I'm successful?" Well, what is success to you? What is it that you're trying to measure? You have to know what that is in the beginning.

**Steph Hay:** That's right.

**Emily Lewis:** Success isn't, like you said, just the Google Analytics numbers look better.

**Steph Hay:** That's right, and it's not a maintenance plan. Especially having worked in agencies for a long time, it's not just a maintenance plan, it is iteration. It is saying, "These three months we're going to try and move the needle on these two measures and here's how we're going to do it." Then putting it into the world and seeing if you do it or not and being brave enough to say, "Well, that didn't work and now we've learned this about it, so let's iterate on how we're doing it and try again."

**Emily Lewis:** So how does that iteration work? Like how do you help your employer, how could we help our customers, our clients, adjust when something isn't working?

**Steph Hay:** Well, it's all about the specificity and the time frame that you're willing to stay the course with the tests and it's entirely dependent upon your scale. So if somebody like a Capital One where we've got millions of data points at any moment within an hour, we can put tests in the market and know by the end of the day what's working and not working as long as we've said, "This is the metric that we're looking at, this is what we're paying attention to."

**Emily Lewis:** Right.



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**Steph Hay:** For others, I've worked in most of my career on sites that didn't have this scale, on companies that didn't have this scale and so it might take a month or two or three to actually see measurable results, and the hard part about those is just the nervousness around that time, is that being time lost? But to really know that you are putting forth the effort to measure and staying true to time frame is what's necessary to get them comfortable with being able to answer the question, "Is this working or not working?" Your job and my job is exactly the same is to require that level of specificity and say, "Why are we doing this? What are the data points we're using to make these decisions in the first place?"

It might be business objectives. Okay, well, these are the three key business objectives. What are some data that we have at our disposal? In the content perspective, that's like your Keyword data or Site Search data or something like that. What are some of the data points that we can use right now to make informed decisions about where to start, and then operationally, what are we measuring against? Our job, as you know, is to define those so that we know why the heck we're doing anything we're doing in the first place.

**Emily Lewis:** When you're looking at something, especially with what you were just saying that sometimes it does take some time to allow the data to come in and then evaluate. So as a site evolves, how do you make sure that content-first, that approach, is still a priority, especially we often, Lea and I will launch with the client and everyone is happy for a period of time, and we're touching base, but nothing is really ongoing, but then some need comes up a couple of months down the road and we're all not still in that same mindset that we were with the original project.

**Steph Hay:** [Agrees]



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**Emily Lewis:** So to keep content-first part of it, like how do you bring in new stuff and ensure that that's still a priority?

**Steph Hay:** There are a couple of tactical things that we do. One is that when somebody requests anything, whether it's for a recently launched site or some new idea that just came out of the blue, just say, "Could you put down two paragraphs or three paragraphs about the end state here. If somebody, if a reporter was writing about this after it launched or after it went live, what would the reporter say about it?" Now, this is a really interesting exercise because the people who have strong vision love doing it, and the people who just want to build it for the sake of building it, maybe aren't sure how to do it, will hate this.

**Emily Lewis:** [Laughs]

**Steph Hay:** And so if you're in a position to say like, "Well, look, this is just going to be some work. This is going to be some work to pay the bills and there's not really an outcome here," it sort of helps you immediately to say whether or not you should worry about trying to measure it versus just doing it because somebody is asking you to do it, and that's the first thing, "Can you give me the end state, two or three paragraphs, about what this would look like after a reporter was writing about it?" The other thing that we would do is, and this is something that I've worked on a bunch, to be able to say, "Hey, okay, this sounds great. I love this idea."

What are the measurements that we're going to put in place to see whether or not this is working, and so some of those things might be like the trigger of who are we showing this to? If there's any ability to show it variably to different kinds of people, who are the people we're showing it to? If they say, well, it's a subset of their customers, well, then that immediately helps you understand where it might fit into the architecture or how it could be messaged to somebody. For example, maybe this should



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just go out to an email. Maybe you should actually have a form on your site that actually has the ability for people to self-identify themselves as part of a certain group if there isn't one already. The point is by asking them like what's the trigger like, when would we actually show this to people, it gets the person who's requesting it to think about their audience.

**Emily Lewis:** [Agrees]

**Steph Hay:** "Oh, well, it would work with this kind of person." "Okay, cool. When would we show it? Where would we show it? Why would we show it?" These are the sorts of questions that immediately follow. Once you have all of that information, you already have the content that you need. You already have exactly what you need to design from there or to ideally have a few paragraphs or content prototype. It outlines exactly what it is that this person wants and why they want it and for whom. So then it goes back to what you were talking about earlier where it's almost like that little mini kickoff again.

**Emily Lewis:** [Agrees]

**Steph Hay:** You get them focused on like what do you want people to be saying about this or what does the conversation we should be having with people.

**Emily Lewis:** I was just going to say that what I really like about what you're describing, and I came into this episode not really knowing what to expect because I have no formal experience with content strategy, but the stuff you're describing, I feel that even Lea and I could start doing some of it. It's just like I was describing, just being more specific by asking.

**Steph Hay:** [Agrees]



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**Emily Lewis:** It's up to us to be more specific with our clients to get the most information we can from them. We don't necessarily write their copy.

**Steph Hay:** [Agrees]

**Emily Lewis:** We don't always have a project that they're willing to bring in a copywriter or things like that, and I think I thought content strategy was copywriting on some level.

**Steph Hay:** Sure.

**Emily Lewis:** And so this is making me realize that definitely it isn't what it has to do with anything. For me and Lea where this is relevant is in that discovery phase where we're really trying to be specific with the client and then also during development and launch, making sure we're still being specific when they're asking us or they ask us to add something extra that was never listed in the beginning and how we're going to evaluate the "success" of the site knowing what those specifics are before we even build it.

This isn't some like concept out there that you have to like grasp at, like you can just as a business owner, as the project manager just change your approach in the very beginning with the questions you ask and the answers you expect.

**Steph Hay:** That's exactly right, and I am now officially hiring you to be my PR representative at actually everything.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]



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**Steph Hay:** No, it's really true, and honestly, copywriting often starts the conversation with us, and I'm welcome to it. Many of us who are content strategists got into content strategy because we love language, because we love the words, we love copywriting, and we love everything about the content. The reality is there is a content strategy field, thanks to pioneers like Kristina Halvorson who formalized it, and now what's happening is we're defining the aspects of content strategy that work for us as individuals into smaller niche groups like UX Content Strategy is a term here. It's the title of the job that I'm hiring for my team. We are UX Content Strategists. We think about design and product as the experience and the communication that's involved in that as all one thing rather than thinking about them as pieces of real estate.

**Emily Lewis:** [Agrees]

**Steph Hay:** And when we think about it in that way, we all bring our various passions to the table, businesses at the table, technologies at the table, visual design and interaction design, UX design and content, we are all at the table, but they're also interrelated that if any of us start getting into the conversations that I think are just no longer relevant in the world today, which is like, "Hey, can you just push this here and move this over here," we end up having discussions about what we're trying to communicate with the person on the other side of the interface rather than trying to tell them how to do it and how to structure it.

**Emily Lewis:** [Agrees]

**Steph Hay:** And by doing that, we end up all learning how to do it better together. We become better designers, the designers and product people become more comfortable with writing consumer-facing or customer-facing content, which is what it's all about. It's not about specialty, but it's about just getting real about what it is that somebody actually needs and then designing an experience together



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to meet that need. So you're exactly right that doing content-first design means being brave enough to stay as far away from the things that start to conflate the discussions with people until you guys know you're all on the same page for sure, and what better way to start doing the work than to start doing the work.

**Lea Alcantara:** Well, this is a really great conversation. So before we wrap up, we do have a couple of final questions. What do you think makes a great content strategist?

**Steph Hay:** Someone who is incredibly focused on finding the language that connects people. Someone who is not attached at all to writing a thing that sounds a certain way. Someone who is not territorial of the language because he or she knows that it's really the customer is the person who needs to own the language, and we're just the people who need to put the words in the right place so that they know we're here for them so we're communicating with them. Content strategist is the kind of person who's enthusiastic about finding better ways to communicate with people.

**Lea Alcantara:** And finally, what are your top resources for getting familiar with content-first design?

**Emily Lewis:** Or content strategy?

**Steph Hay:** The leaders of the industry, the Kristina Halvorson and the Karen McGrane, and I love the stuff that Kate Kiefer Lee and Nicole Fenton have written on NicelySaid(.co) out of their experience with the MailChimp. These are a few places I would start. Some of the work that I've done in content-first design on uie.com.

There are a couple of podcasts and our virtual seminar is there that I would point people to, but generally speaking, I think it's such an emerging field, so think about content-first design almost like scriptwriting was for Hollywood or video game design is. This is the sort of the stuff that is emerging



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in our field and so I'm excited to be on one of the pioneers of this as a concept and as a methodology at Capital One, so maybe follow Capital One and some of the things that we're doing.

**Emily Lewis:** Cool. It just occurred to me when you mentioned with like how people are writing scripts for Hollywood or how video game designers are crafting those experiences. I wonder if more and more of those sorts of trades and skill sets will come into our field because they just seemed to be such a natural fit as our field is evolving.

**Steph Hay:** That's right. That's right, and almost they have to because they set the precedent of what you would expect from an interface. Video games are 20 years ahead of us.

**Emily Lewis:** [Agrees]

**Steph Hay:** And the creativity and the level of design that goes into their storytelling is not by accident, it's because it increases engagement and retention and that's the entire business of the video game industry. The more you play a game, the more you invite other people to play a game, that's how they grow.

**Emily Lewis:** Oh, I love this. I really do. I love it because I feel like it's something that anyone can do. I mean, and I don't mean that in a way like, "Oh, it's so easy. Anyone can do it."

**Steph Hay:** [Laughs]

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**Emily Lewis:** I just mean anybody could take this time to kind of focus themselves in a little different way with their projects and how they communicate and define success. So that's what's really appealing to me. I feel like it is empowering.

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**Steph Hay:** That's right. I feel the same way. I'm glad to hear it. Thank you.

**Lea Alcantara:** I think you used the right language. [Laughs]

**Steph Hay:** [Laughs]

**Emily Lewis:** [Laughs]

**Steph Hay:** Exactly. It's nicely done, content strategist already.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** [Laughs]

**Lea Alcantara:** So before we finish up, we have our Rapid Fire 10 Questions so our listeners can get to know you a bit better. Are you ready, Steph?

**Steph Hay:** I'm ready.

**Lea Alcantara:** Okay, question one, Android or iOS?

**Steph Hay:** Android.

**Emily Lewis:** If you are stranded on a desert island and can only bring three things, what would you bring?

**Steph Hay:** A giant umbrella, chapstick, and endless supply of fresh water.

**Emily Lewis:** [Laughs]

**Steph Hay:** How boring is that? But that's true.



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**Emily Lewis:** Survival. [Laughs]

**Steph Hay:** That's right.

**Lea Alcantara:** What's your favorite TV show?

**Steph Hay:** *Game of Thrones* right now.

**Lea Alcantara:** Nice.

**Emily Lewis:** What's your favorite dessert?

**Steph Hay:** Oh, Tres Leches Cakes. Holy cow!

**Emily Lewis:** [Agrees]

**Steph Hay:** Especially from Mamma Zu's in... anyway, it doesn't matter. It's amazing. In Richmond.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Steph Hay:** It's amazing.

**Lea Alcantara:** What profession other than your own would you like to attempt?

**Steph Hay:** I would like to be an architect.

**Emily Lewis:** What profession would you not like to try?

**Steph Hay:** I would hate to be a garbage man or woman. [Laughs]

**Lea Alcantara:** What's the latest article or blog post you've read?



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**Steph Hay:** That's a great question. I just read this really great post from Google designer about how Google has transitioned to be a design-led organization.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** If you could have a super power, what would it be?

**Steph Hay:** Flying for sure.

**Lea Alcantara:** What music do you like to work to?

**Steph Hay:** Classical, WETA here in Washington, DC.

**Emily Lewis:** And last question, cats or dogs?

**Steph Hay:** Cats. I've got one, she's seven. Her name is Sneakers.

**Emily Lewis:** Oh.

**Lea Alcantara:** Oh, we're cat people here. This is a cat show. [Laughs]

**Steph Hay:** Good. That's right. That's so good. [Laughs]

**Emily Lewis:** [Laughs]

**Steph Hay:** Do you find as a cat person, by the way, like I do sometimes when people ask that question, I feel like I should say dog. [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]



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**Steph Hay:** Like, “Oh geez, here we go, I’m going to say cat and they’re going to be like, ‘I don’t like cats,’ and I’m going to say, ‘You must not have a heart then.’” [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** I have no shame in my cat-loving game. [Laughs]

**Steph Hay:** Good. [Laughs]

**Lea Alcantara:** Cat-loving game. [Laughs] It’s awesome.

**Emily Lewis:** Well, I’m going to have a fourth cat soon, so there’s definitely game in that. [Laughs]

**Lea Alcantara:** Oh. [Laughs]

**Steph Hay:** It’s crazy.

**Lea Alcantara:** All right, so that’s all the time we have for today. Thanks for joining us, Steph.

**Steph Hay:** Thanks for having me.

**Emily Lewis:** In case our listeners want to follow up with you, where can they find you online?

**Steph Hay:** They can find me on Twitter [@steph\\_hay](#).

**Emily Lewis:** Thanks again. This was a great conversation.

**Steph Hay:** Yeah, thank you. I loved it.

[Music starts]

**Lea Alcantara:** We’d now like to thank our sponsor for this podcast: [Pixel & Tonic’s Craft](#).



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**Emily Lewis:** And thanks to our partners: [Arcustech](#), [Devot:ee](#) and [EE Insider](#).

**Lea Alcantara:** We also want to thank our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#). And if you liked this episode, please give us a review on [iTunes](#) or [Stitcher](#) or both!

**Emily Lewis:** Don't forget to tune in to our next episode when we continue our exploration of the Craft CMS with a deeper dive into its Twig templating language with Andrew Welch. Be sure to check out our schedule on our site, [ctrlclickcast.com/schedule](#) for more upcoming topics.

**Lea Alcantara:** This is Lea Alcantara ...

**Emily Lewis:** And Emily Lewis ...

**Lea Alcantara:** Signing off for CTRL+CLICK CAST. See you next time!

**Emily Lewis:** Cheers!

[Music stops]

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