DIGITAL ADOPTION TEAM CONTENT STANDARDS

Concise, easy to read, and visually pleasing content is key to successful communication and training materials. The following guidelines help you successfully create effective field content. These standards align with Northwestern Mutual's Branding Guidelines and will be used to evaluate content in regular content reviews.

WRITING STANDARDS

Effective training and communications content should be:

- Accurate, compliant and up to date (processes, tool versions, etc.)
- Short and to the point
- Easy to understand – not overly technical. Clearly stated
- Grouped in steps or bullets as opposed to lengthy paragraphs where feasible
- Created in Word or Power Point for ease of updating
- Proofread – no typos!
- Inclusive of links to a video or other page that supports the content (when available)
- Compliant with Linknet Standards and Practices

DOCUMENT DESIGN STANDARDS

The design of content must be clean and NM branded through use of the NM logo and colors used within the branding guidelines.

The layout should:

- Feature up-to-date branding; include Purchase Experience or other relevant wordmark where appropriate to properly position content
- Use established formats such as the Job Aid template, Best Practices template, and Tips template
- Include the last modified date somewhere on the page (footer is fine)
- Facilitate scanning by the reader (e.g., using a horizontal border to break up blocks of text).
- Offer a good overall page flow and look – does the flow make sense to readers?
- List steps numerically with bold action prompt (e.g., Select **View** or **Edit permissions**)
- Use colored/bold copy only for crucial information in the document — do not overdo!

DOCUMENT FORMATTING STANDARDS

Once the content is complete, the final document for upload should always be created as follows:

- In Word or Power Point, update the Properties with owner's name, document title, and Purchase Experience or other topic in the Subject space
- Save as PDF if the document was created in Word or Power Point
- Confirm Properties are present in resulting PDF
- Ensure that links transferred over to PDF successfully. All hyperlinks must open to the correct destination and not break

VIDEO STANDARDS

- Content
  - Add a separate thumbnail for videos so they don't all start with a plain blue slide. Choose a compelling graphic or screenshot of speaker (faces). Don't choose something with tiny text that is hard to read as a thumbnail.
  - Proofread the transcription
  - Does this replace previous content? Make sure to delete the outdated video if so and alert Linknet site coordinator so links can be updated
  - If this webinar is essentially the same as a past one with the same title, simply replace the media with the newer file and leave the program the same. That way the link/program page will not change but the content is up to date
  - Audio/video content should belong to the relevant channel: Purchase Experience, Planning Experience, Digital Capabilities, etc.
  - Video should be assigned to an appropriate playlist(s) within the channel
- Descriptions
  - Recorded webinar descriptions should note the agenda topics with timestamps. They should also include links to the slide deck and if available the Q&A transcript (these resources are posted to Linknet)
  - Include names of participants in description for searchability
  - When there are multiple videos on a given topic, ensure that the description conveys what is distinct about this one to reduce confusion
- Tagging
  - Add at least three tags; use the name of the playlist to suggest a topical tag(s)
  - Include the relevant category as a tag; this tag is required for metrics gathering:
    - Purchase experience phase: application, underwriting, or post approval
    - Planning experience (Planning Approach, Protect & Prosper, Research, Planning Tools).
    - Illustrations
    - Client Web & Mobile: website, mobile app
  - Don't use a full phrase as a shorter one will pull in more search results: e.g., don't use "digital purchase experience" or "purchase experience" when you can use "purchase" – the latter will pull in all searches for the first two as well. Be careful you don't unintendedly get too broad – "onboarding" will bring in both client onboarding videos and new hire onboarding videos, for instance.

HOSTING STANDARDS

- Documents for the field should be stored in Linknet or Mutual Knowledge or in a library in the field force directory of SharePoint.
  - Do not upload the same document to multiple field-facing directories for version control reasons.
  - Do not share documents from a user's OneDrive account (the links break if that person leaves the company).

- Audio and video content should be hosted in AVHQ – not on the LAN or on SharePoint or in OneDrive. This is because AVHQ is optimized for streaming audio and video, the other types of repositories are not. This results in a better user experience and compliance.
- eLearning modules should be uploaded to NM Learn

SEARCH AND USAGE GUIDELINES

- How easy is the content to find? Assess search results for the content using logical search terms.
- How frequently is the content used? Evaluate the bottom 10% of content in the category for each channel and ask whether it's still needed. Is it easily findable?