Set up a content creation flow (example)

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When writing content within a team, **effective collaboration is key**. Different roles, such as content editors, legal reviewers, graphics designers, or external contributors, have different responsibilities. Let them know what's expected of them and when.

In this example, you'll learn how all this can be achieved by setting up roles, workflows, and other things to see how they all work together.

This is the last part of a multi-chapter story about collaboration

If you're unsure about the theory of the process of setting up the team and collaboration, read the previous chapters first:

1. Establish roles working with your content
2. Create workflows for an effective content strategy
3. Think through translated or regional content
4. Set up your content creation process

This example will showcase team configuration and collaboration flow on a sample insurance company called SafeLife.

1. Preparing the roles

Establishing roles starts with the division of permissions into the administration and content permissions.

Administration permissions

In SafeLife, the project is coordinated and will be later maintained by:

- Jennifer, the Director of Content Strategy in charge of content production
- David, the IT Manager in charge of apps that SafeLife runs

David should be the *Subscription admin* (and therefore the default *Project manager*) as he backs up all systems in the company. Jennifer should be the *Project manager* so that she can invite users and tweak the workflows. When necessary, this allows her to adjust the content model as well.

Other Developers that report to David should also be in the *Project manager* role as they will implement the app and later maintain it. They will be involved also in navigation maintenance, but that's related to the content permissions.

Content permissions

Before starting to divide permissions, let's answer the questions that will help with the division:

1. Who's the main content creator?
2. What content is edited by who and when?
3. What is the process of content creation? Which steps does the content go through before it's published?
4. What is the approval process before the content is published?
5. How will the respective team members collaborate? Will they be expected to pick content for editing, or will specific content be assigned to them?

The answers can look like this:

1. Content is created directly in Kontent.ai by a team of six Content Editors. The team focuses on working with text and assets. However, they do not manage metadata for individual articles or navigation items. Also, only two of them are trained Insurance Specialists and can work with insurance offerings.
2. Apart from Content Editors, there is a Content Manager, Lisa. She reviews the content and manages metadata. In case she's not at work, she's substituted by one of the Content Editors, Matt. Neither of them, however, manages the navigation. The navigation is only edited by the Developers.
3. The content journey is not particularly complex in this case. Content Editors create content and submit it for revision. The Content Manager (or her substitute) checks the content for accuracy and adjusts the metadata. If needed, they send it back to the Editors.
4. After a revision without any changes, the next step is a legal check. Once approved by the legal team, it goes back to the Content Manager, who can then publish. If there is an adjustment needed, the legal team sends it back to the Content Manager with guidance on how to proceed.
5. The Editors are free to browse and work on any content item (except for insurance offerings), content is not assigned directly.

Creating roles

To clarify the relationships, you can draw a diagram as well if it's helpful.

See the diagram on https://viewer.diagrams.net?lightbox=1&nav=1#Uhttps%3A%2F%2Fraw.githubusercontent.com%2FKenticoDocs%2Fkontent-docs-diagrams%2Fmaster%2Fteam%2Froles%2Froles_hybrid_approach.drawio

What do the answers tell us about role permissions?

- Content Editors are not supposed to publish any content and edit metadata or navigation. There is a restriction on insurance offerings. Only a subset of Content Editors can change those.
- Metadata is only edited by the Content Manager and their substitute. The navigation is only edited by Developers.
- Part of the process is a legal check by the legal team, but they do not need to edit the content.

- Only the Content Manager and their substitute can publish content.

Based on the organizational hierarchy and provided answers, the chosen configuration looks like this:

Role	Can do	Cannot do	Who's in it
Project manager (default)	Everything (cannot be changed)	—	David, IT Manager (as a subscription admin); Jennifer, the Director of Content Strategy; and Developers.
Content editor	View, edit, create and delete all content items	Delete, create, edit, and view metadata and navigation items Delete, create, and edit insurance offerings	All Content Editors who are not the substitute for the Content Manager and are not trained for the insurance offerings.
Content editor - Insurance	View, edit, create and delete all content items	Delete, create, edit, and view metadata and navigation items	The two Content Editors that are trained for the insurance offerings.
Content reviewer	View and edit all content items	Delete, create, and edit navigation items	Lisa, Content Manager; and Matt, Lisa's substitute.
Legal	View all content items	Delete, create, and edit navigation items	Legal team members

The example shows a hybrid approach to naming from the organizational and permission point of view. The names describe their position in the company but are adjusted based on the role's permissions.

2. Preparing the workflows

SafeLife chose to use a single workflow with a [hybrid of activity and process-based steps]() as Lisa, the Content Manager, needs to have an overview of the states in which different [content items]() are.

See the diagram on [https://viewer.diagrams.net?lightbox=1&nav=1#Uhttps%3A%2F%2Fraw.githubusercontent.com%2FKenticoDocs%2Fkontent-docs-diagrams%2Fmaster%2Fteam%2Fworkflows%2Fworkflow_activity_and_process_based.drawio]()

The answers to the role questions above uncovered the transition paths as well.

Workflow step	Can transition to	Dedicated roles
Write	Review and metadata, Archived	Project Manager, Content Reviewer, Content Editor, Content Editor - Insurance
Review and metadata	Write, Legal review, Archived	Project Manager, Content Reviewer
Legal review	Review and metadata, Ready	Project Manager, Legal
Ready	Write, Review and metadata, Scheduled/Published, Archived	Project Manager, Content Reviewer
Scheduled/Published, Archived	—	Project Manager, Content Reviewer

Multiple workflows

If you're an organization with complex content needs and have multiple types of content that require different workflow approaches, multiple workflows are the way to go. Set up a separate workflow for each type of content to reflect how your organization works.

3. Incorporating translated and regional content

SafeLife has branches in the United States, Canada, and Mexico. The original content is created in the United States. Canadian content is the same as the US content but is automatically adjusted so that Canadian English is used. Mexican content is translated to Spanish by the local branch manager directly in Kontent.ai.

Localization needs

Looking at it from the role and workflow point of view after creating the language variants, there are a few decisions and possible adjustments for smooth content translation:

- As roles are assigned to users per each language, the Mexican branch manager will get the *Content Reviewer* role for the Mexican content. All *Project Managers* and existing *Content Reviers* will be allowed to maintain all languages while the rest will be only allowed to access the US content. No new role is, therefore, needed.
- The Canadian translation will happen automatically by integrating the translation service. The service will be automatically activated when a content item moves to *Ready*. For the US content, it will translate it to the Canadian version and move its workflow to *Ready* as well. No new workflow step is needed either.

Make navigation in your project a breeze

If you're in a company like SafeLife with multiple departments, such as marketing, accounting, and human resources, use collections to categorize your content items by department they belong to. You can then filter out Mexican marketing content, for instance.

Layout needs

Another difference isn't in the language but in the layout. Mexican content should sometimes have a different layout. As variants are not copies with different texts only, you can adjust their appearance as well. The Mexican content typically contains the following changes:

- Using an alternative backdrop image
- Rearranging the insurance listing to highlight appropriate products
- Featuring different testimonials in the carousel

Since these tasks are done with linked items and components, the only thing that you need to consider is that you need to define appropriate content types so that the editors can later use them as desired.

4. Establishing a content creation process

How should all the people work together? It’s best to make the team part of the process planning and implementation. If you’re not sure whether your editors will be happy with a configuration, share your plans and ask them. Also, gathering feedback from stakeholders in your company greatly affects the outcome.

Planning content

SafeLife's content is either part of a campaign or it's permanent content that's typically informative only. Whether the content items are created by the editors themselves or by Lisa, the Content Manager, she will fill in due dates so that the editors know when they need to finish composing them.

She can plan the due dates easily as she checks the editorial calendar. During the workweek, she can also check how they're doing in the project overview and decide about changes when needed.

During every week's staff meetings, Lisa divides work among editors and they assign themselves as contributors. They can see items assigned to them when navigating to the **Your content** tab in **Home** on the **Assigned to you** tab.

Collaborating on content

When the editor needs any help during composing their item, they create a task for another editor. At this point, the tagged editor will get a notification email. If they don't want to check their mailbox for tasks, they can get a quick overview when they can navigate to **Your content** tab in **Home** and see on the **Your tasks** tab what tasks have been assigned to them.

To keep the communication flowing, Lisa helps her team stay in the loop by nudging editors into commenting and making suggestions. She uses them herself when reviewing content but they are also useful for checking each other's work or when they need to sync. Apart from the comments and suggestions, they can compare the current version of the item to a previous one.

Reviewing content

When someone from the team sends the item to another workflow step, they always attach a note with additional information for the person sorting out the next step. The key part of SafeLife's content process is that the editors see the progress in real-time directly in Kontent.ai. Thanks to that, they don't need to use other apps.

Before publishing it, Lisa wants to see what her content looks like on the website. She can quickly do so by checking its preview.

Simplifying preview

To make it even more straightforward, you can display preview directly in Kontent.ai. By using Web Spotlight, you get a unique experience of working on your website's content and then previewing it, all within the context of your web. Check out how Web Spotlight works.

Alternatively, create a content group (called, for example, *Preview*) and add a custom element that will show the preview of the content item. This way, you'll keep preview where the creative process happens.

What's next?

This was an example of how roles, workflow, regional content, and the content process can help you and your colleagues collaborate more easily on producing content. You can build upon the example shown here and tweak them to suit your own production flow.

To learn more about the ins and outs of these necessary steps for configuration when using Kontent.ai, check out the articles from the series:

- Establish which roles work with your content
- Create workflows for an effective content strategy
- Think through translated or regional content
- Set up your content creation process

When your configuration is done, don't forget to invite users to your project and assign the new roles to them.

If you've done all of that already, look into importing your existing content into your Kontent.ai project.