STRATEGY GUIDE

A Tried-and-Tested

Content Scoping Template

for B2B Website Refresh



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Executive Summary

The website refresh calculus has changed.

A website refresh is no longer just a design decision where you move to a new template and cleaner navigation to give your site a fresher look every few years. More than ever before, the website must now speak to your audience and establish a connection when you are not around to make a pitch.

61%

That's the proportion of B2B buyers who reported in a Gartner survey that they now prefer to research and evaluate vendors without talking to a sales rep.[1]

1. https://www.gartner.com/en/newsroom/press-releases/2025-06-25-gartner-sales-survey-finds-61-percent-of-b2b-buyers-prefer-a-rep-free-buying-experience

McKinsey's 2026 Global B2B Pulse survey identifies inconsistent information as the top reason B2B buyers switch suppliers.[2]



A redesign built on content that has not kept pace with the business or buyer needs will only present mismatched information more attractively. A key reason refresh projects fail is that content gets scoped to new requirements as an afterthought, leaving gaps in how the website tells your story.

This guide offers a working framework for scoping content before a refresh begins. It covers a pre-scoping audit, a 10-part framework for content scoping, and a page-level template your team can use to start the content scoping process.

2. https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-surprising-economics-of-b2b-growth-the-new-survival-threshold-and-what-it-takes-to-thrive



What is content scoping, and how do you do it?

Content scoping gives a website refresh a clear starting point. Begin by checking what has changed in the business, the audience, the buyer journey, and the current site. Then turn those findings into a decision for every page that enters the refresh.

The work produces two practical outputs: **a current-state website scorecard** and **a content scope document**. The scorecard shows where the site is ready, at risk, or unclear. The content scope document sets the audience, message, proof, ownership, priority, and success measure for each page.

The pre-scoping audit

Before writing a detailed website refresh brief, run a rapid diagnostic across these seven areas to gauge the website's overall relevance and performance in the current business context.

01

Business

Has the business model, product line, or geographic footprint changed since the last refresh?

02

Audience

Has the audience shifted, or have their expectations moved even if the audience itself has not?

03

Buyer Journey

Where in the journey does the current site actually serve buyers well, and where does it go quiet?

04
SEO and AI Visibility
Which pages carry search equity today, and how does the company show up when someone asks an AI tool about it?

05
Analytics and Conversion
Which pages convert, which get traffic but no action, and which get neither?

06
Competitive Positioning
Would a stranger visiting your site for the first time describe the business the way it actually operates?

07
Technical Constraints
Where does the current CMS, hosting, or integration setup limit your content?

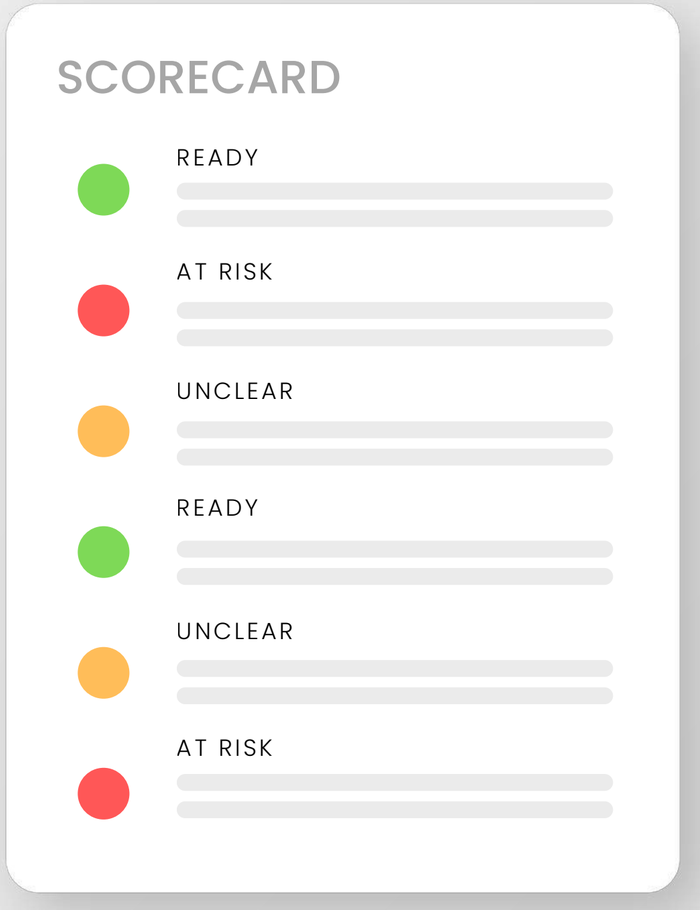
The current-state website scorecard

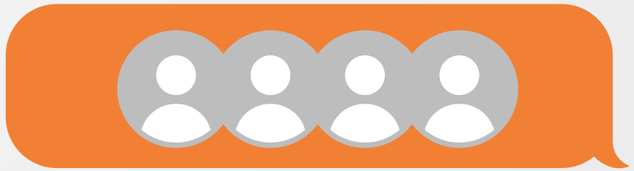
Score the website against the seven areas as ready, at risk, or unclear. Record the results on a current-state website scorecard, which is a one-page diagnostic the team can look at before scoping begins.

An important factor to watch out for at this stage is narrative drift.

Narrative drift takes place when a business moves on to newer frontiers, but the website does not. The drift is not always easy to catch and may stay invisible from the inside. It may show up on pages that are not closely watched.

Narrative drift may be prominent on the About page, still describing a company from before the last positioning change, or on a product page nobody has touched since the roadmap moved on.





OUTSIDE-IN PERSPECTIVE

After the seven-area scorecard, run one more check.

ACTION

Hand the site to someone outside the business, a new marketing hire or an external content partner, and ask them to describe the company, its products, and its buyers from what they read. Wherever that description misses the mark, positioning has drifted.



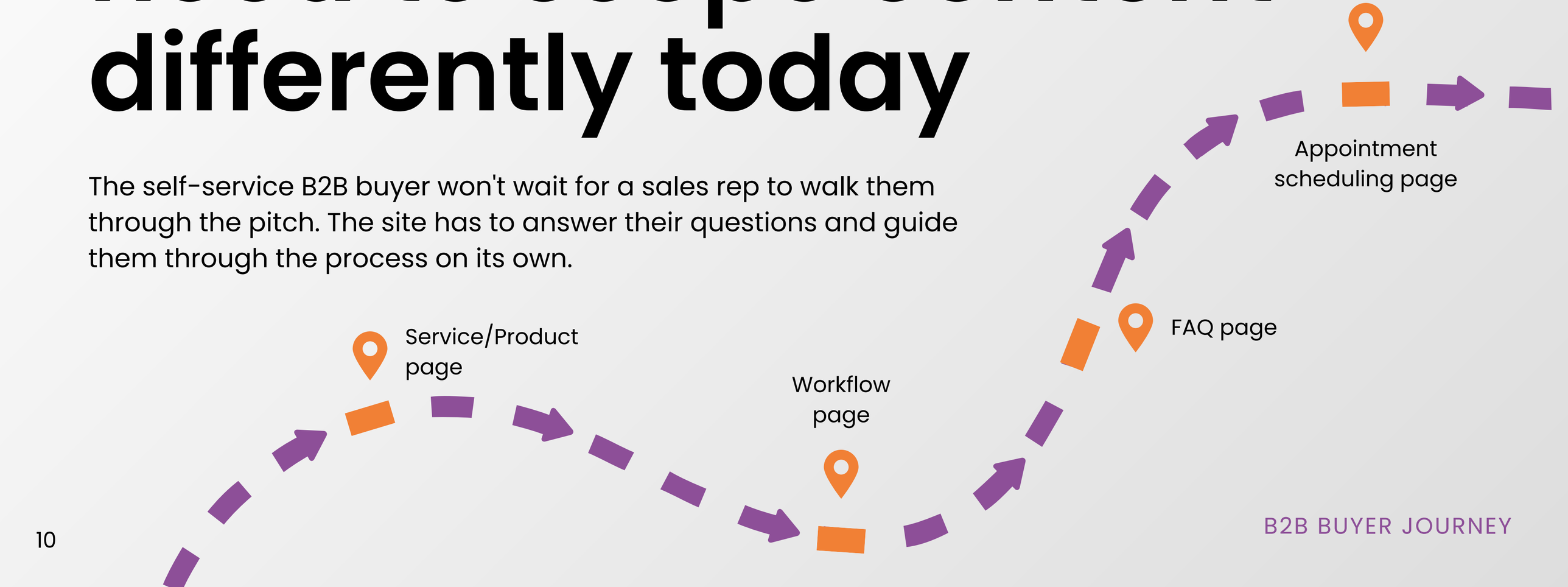
YOUR WEBSITE

Not sure where your website stands? Start here.
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Why website refreshes need to scope content differently today

The self-service B2B buyer won't wait for a sales rep to walk them through the pitch. The site has to answer their questions and guide them through the process on its own.



B2B BUYER JOURNEY

Generative AI has added a new dimension to content scoping

McKinsey's 2026 Global B2B Pulse survey (cited earlier) found that Gen AI tools constitute the top five channels buyers use to discover and evaluate suppliers, alongside a company's website, in-person interaction, web search, and video conferencing.

A website refresh now has to work for three audiences, namely the people who read it, the search systems that index it, and the AI tools buyers use to research suppliers.

The same McKinsey research found that B2B buyers are now split into distinct behavioral groups with different research habits and risk tolerances.

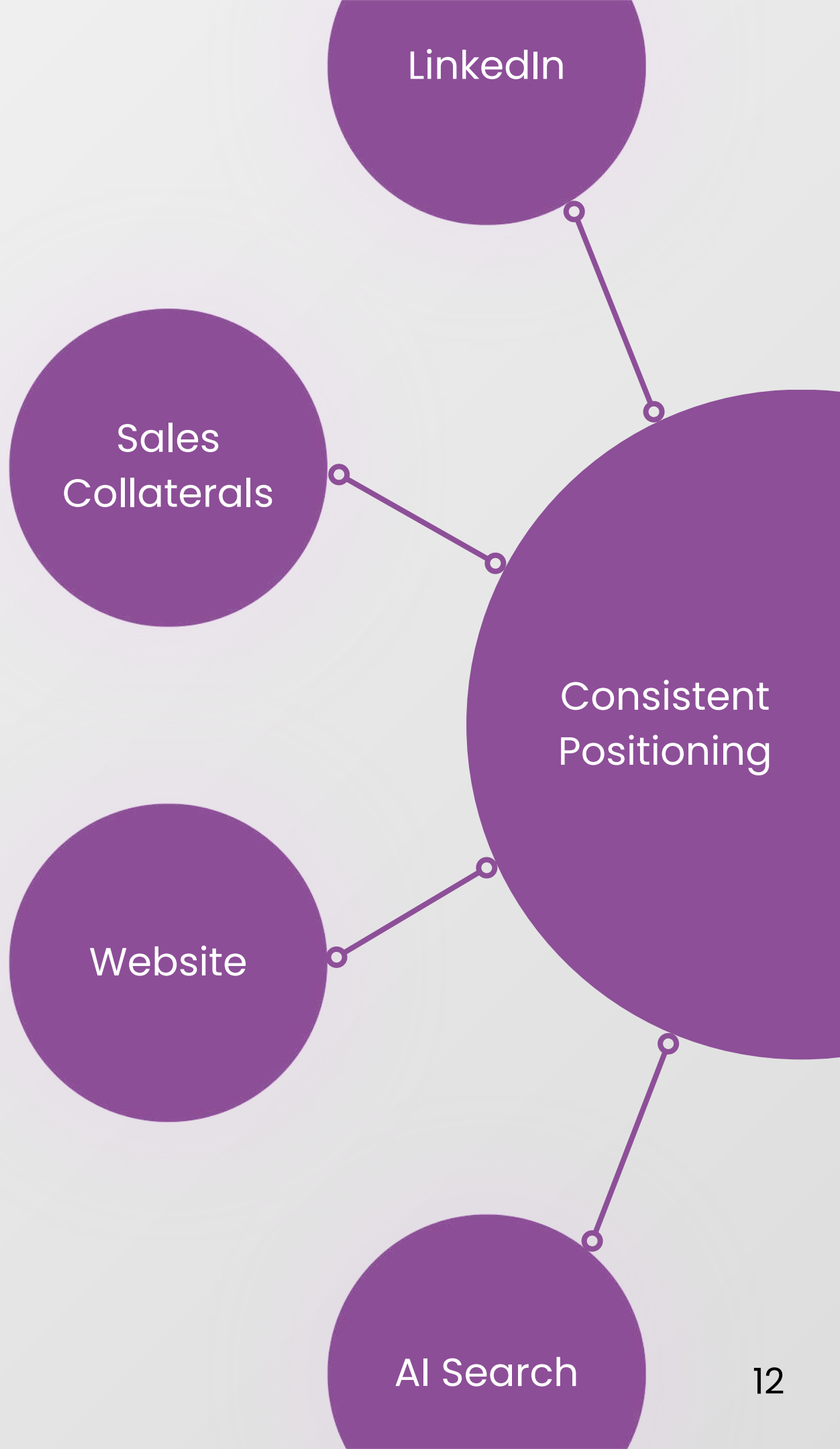
A single page trying to satisfy a cautious evaluator and a fast-moving early adopter at once may satisfy neither. Each page must be built keeping the characteristics of the primary user in mind.

With buyers spending time on a website before talking to a sales rep, content consistency across channels becomes critical.

69%

That's the proportion of B2B buyers who reported inconsistencies between what a company's website says and what its sales team tells them directly, and this gap can weaken brand credibility (Gartner).

Evidently, your website is no longer a supporting asset for the sales team. It has taken the role of a pre-sales team in the new B2B buyer's journey. Content scoping for a website refresh must account for this new reality.



The tried-and-tested content scoping framework

We recommend a 10-part content scoping framework in which asking the right questions and collecting the right data become critical before any decisions are made.

01 Business objectives

02 ICP and buying groups

03 Buyer journey

04 Positioning and messaging

05 Content inventory

06 Information architecture

07 Content architecture

08 Proof and credibility

09 SEO and AI visibility

10 Conversion and measurement

01
Business objectives

WHAT TO ASSESS

Check whether the current site reflects the business the company plans to run over the next year. Review revenue targets, expansion plans, the product roadmap, and recent positioning changes.

HOW TO USE IT

Decide whether the refresh should support authority-building, lead generation, customer engagement, or another defined priority. Record the decision in a one-page objectives brief for the whole team to approve before scoping continues.

02
ICP and buying groups

WHAT TO ASSESS

Define the buyers, the people who influence the decision, and any changes in their needs since the site last shipped. Check whether each page has one clear primary audience.

HOW TO USE IT

Gather current Ideal Customer Profile (ICP) definitions, buying-committee roles, and new segments sales is pursuing. Map each page to its primary audience and create a buying-group map that shows which stakeholder each page serves.

03
Buyer journey

WHAT TO ASSESS

Study your site's analytics, then compare the findings with sales call notes and support tickets to identify where buyers get stuck or lost today. Identify the buying stages the site serves well and the stages that need new or rewritten content.

HOW TO USE IT

Collate sales call notes, deal-stage drop-off data, and support tickets that reveal confusion. Understand which journey stages are underserved and need new or rewritten content. Produce a journey-to-content map, stage by stage.

04
Positioning and messaging

WHAT TO ASSESS

Confirm whether your site describes your company's products and services accurately and focuses on the actual buyer and their pain points.

HOW TO USE IT

Fetch the current messaging document and recent sales objections. Spot pages that carry outdated positioning and need a message-level rewrite. Deliver an updated messaging reference that the marketing team works from.

05
Content inventory

WHAT TO ASSESS

Sift through your site and make note of everything that exists. Then, check what's actually being used and what nobody remembers publishing.

HOW TO USE IT

Choose which pages to keep, rewrite, consolidate, or retire. Use the website refresh decision matrix in the next section to make the call. Build a scored content inventory, page by page.

06
Information architecture

WHAT TO ASSESS

Verify whether your current site structure caters to your buyers' search behavior. You can understand this by collecting the existing sitemap, Google Search Console data, and navigation click paths.

HOW TO USE IT

Understand the hidden patterns, make a note of what moves, what merges, and what needs a new home. Put together a proposed sitemap with the new location of every page marked.

07
Content architecture

WHAT TO ASSESS

Check whether the content format and depth of each page meet the requirements, beyond just the topic it covers. Find examples of content types already working, guides, calculators, case studies, and ones that are not.

HOW TO USE IT

Resolve which pages need a format change rather than new words in the same old template. Write content-type guidelines for each page type in the new structure.

08
Proof and credibility

WHAT TO ASSESS

Learn what evidence backs the claims on each page and where a claim currently stands alone.

HOW TO USE IT

List available case studies, data points, testimonials, and certifications by page. Determine which pages need new proof before they can be rewritten credibly. Create a solid proof-gap list mapped to the pages that need it.

09
SEO and AI visibility

WHAT TO ASSESS

Spend time learning about the pages that carry search equity and how AI tools describe your company. Note down the current rankings, the backlink profile, and a spot check of AI-generated answers about the business.

HOW TO USE IT

Decide which pages need a redirect, which need restructuring for AI visibility, and which are safe to leave as is. Once you are done, share a clear redirect map and an AI visibility priority list.

10
Conversion and measurement

WHAT TO ASSESS

Identify the actions each page must drive and how that will be measured after launch. Collect current conversion rates by page and the metrics leadership will want to review.

HOW TO USE IT

Focus on pages that need a clearer call to action and map out a 90-day success benchmark. Build a measurement plan tied to each page's goal.

Turn the framework into page-level decisions

The 10-part framework sets the questions the team needs to answer before a page enters the refresh. This template records the answer for every page, including its audience, place in the buying journey, core message, proof, ownership, priority, and success measure.



> Use it as a spreadsheet or a word document. Keep one completed entry for every page the team plans to keep, rewrite, consolidate, create, or retire.

Field	What to define
Page URL	What is being created or changed
Purpose	Why this page exists
Audience	Who it serves
Buying stage	Where they are in the journey
Primary question	What the page must answer
Search intent	What query or problem it addresses
Core message	What the reader should remember
Differentiator	Why this company specifically

Field	What to define
Proof	What evidence supports the claim
Content elements	Copy, video, calculator, case study, and so on
Call to action	What should happen next
Internal links	Where the buyer goes next
AI visibility	What entities, topics, or questions the page must clarify
Owner	Who supplies and approves the information
Priority	P1, P2, or P3
KPI	How success will be measured

The website refresh decision matrix

Start with the 10-part content scoping framework and the content inventory to assess the raw material for each page. Score each page across seven dimensions: business value, buyer value, revenue value, search value, AI value, evidence strength, and current performance.

Although the score doesn't decide the outcome on its own, it gives the team a clear basis for choosing one of six outcomes.

1. Keep it as it stands.
2. Rewrite it to match current positioning.
3. Consolidate it into a stronger page that covers the same ground.
4. Create a new page for a gap the audit surfaced.
5. Remove it outright.
6. Or test two versions (perform an A/B test) before deciding.

In total, the framework has three layers:

- The pre-scoping audit with seven dimensions that decides the relevance and performance of the website
- The 10-part scoping exercise that dives into each page
- The six outcomes that define the next step for each page

Page Name	Dimension	Score
About	Buyer Value	86
...		

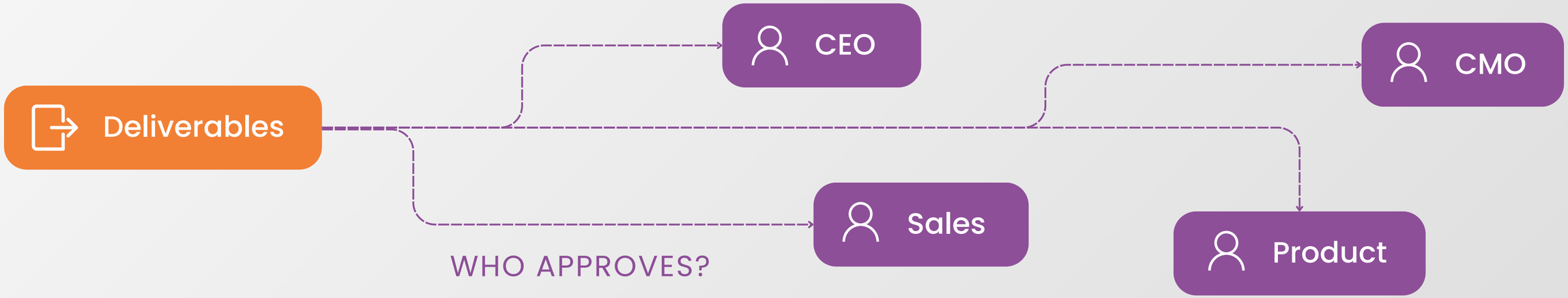
A page can score high on search value and still get removed if it carries no business or buyer value. A low-traffic page can stay if it supports a later stage of the buying journey that analytics alone don't capture.

Not sure where your website stands? Start here.
Use our AI prompt for a first-level review of your website's content.

Get the review prompt →

Stakeholders and governance model

Most often, governance causes refresh delays because everyone assumes someone else has the final say. To avoid confusion or delays later in the project, reach a clear consensus on who provides input, who reviews, who approves, and who owns each page during the scoping process and after launch.



A sample ownership model for the refresh

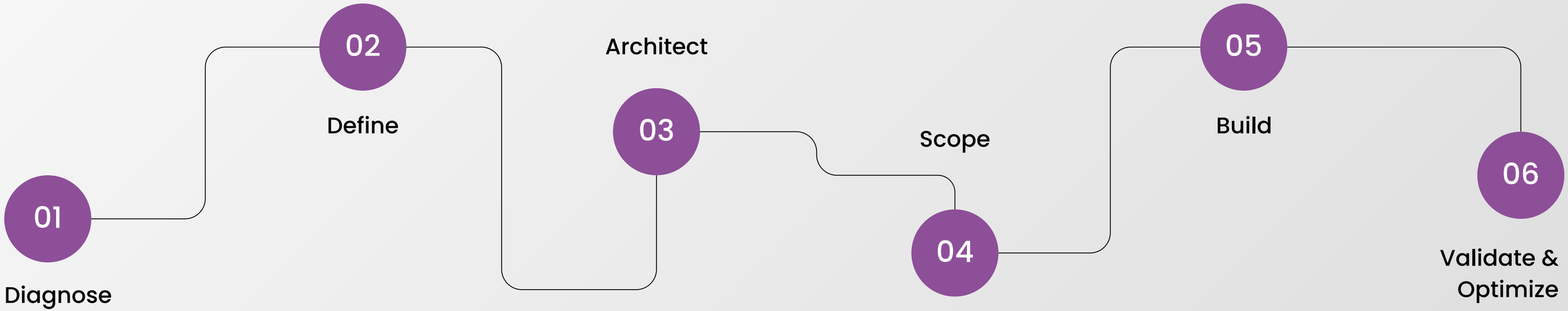
Use it as a starting point, then adapt the roles and decision rights to fit how your organization makes decisions.

Role	Provides input	Reviews	Approves	Owns after launch
CEO or business leadership	Strategic direction	Yes	Final sign-off on positioning	N/A
CMO	Brand and messaging direction	Yes	Yes	Overall site performance
Product	Product accuracy, roadmap	Yes	Yes	Product page accuracy
Sales	Buyer objections, deal intelligence	Yes	N/A	N/A

Role	Provides input	Reviews	Approves	Owns after launch
Customer Success	Retention content, FAQs	Yes	N/A	Support and help content
Content team	Drafting and editing	Yes	N/A	Editorial calendar and updates
SEO	Technical and on-page requirements	Yes	N/A	Rankings and redirects
IT	Technical feasibility, CMS	Yes	N/A	Site uptime and infrastructure
Legal	Compliance review	Yes	On compliance-sensitive pages	N/A
Web or migration	Build and migration	N/A	N/A	Post-launch technical maintenance

The website refresh roadmap

Six phases carry a refresh from diagnosis to a measurable result.
Treat the durations as a realistic floor for a mid-sized B2B site.



DIAGNOSE

2-3 weeks

WHAT HAPPENS

Audit the business, audience, buyer journey, SEO and AI visibility, analytics, and competitive position

PRIMARY OUTPUT

Current-state website scorecard

DEFINE

1-3 weeks

WHAT HAPPENS

Set objectives, confirm positioning, and map the buying groups the refresh needs to serve

PRIMARY OUTPUT

Strategic brief

ARCHITECT

2-3 weeks

WHAT HAPPENS

Rebuild the sitemap, content model, and URL structure around the buyer journey

PRIMARY OUTPUT

Proposed information architecture

SCOPE

1-3 weeks

WHAT HAPPENS

Define page-level requirements, ownership, and priority using the framework and template above

PRIMARY OUTPUT

Content scope document

BUILD

4-12 weeks

WHAT HAPPENS

Rewrite, create, consolidate, and migrate the pages selected during scoping

PRIMARY OUTPUT

The new website

VALIDATE & OPTIMIZE

First 90 Days

WHAT HAPPENS

Track organic and AI visibility, engagement, conversion, pipeline, and sales feedback

PRIMARY OUTPUT

90-day optimization plan

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How Purple Iris did it for an IT services company

ABOUT THE PROJECT

A global digital transformation and technology consulting company brought Purple Iris in to scope a website refresh. The website contained information that was dated and inconsistent with what it was saying across other channels. The website spoke only to CIOs and CTOs and left out other key business decision-makers. Though the company's offerings had expanded, the messaging had not evolved.

The scoping exercise that included over 20 pages of complex technology solutions presented a number of challenges.

WEBSITE REFRESH AUDIT

- Every department had its own point of contact pushing a different rewrite. For instance, the CMO wanted the messaging in the solution pages to be executive-friendly and outcome-oriented, whereas the engineering team wanted more focus on solution architectures.
- The assets shared, such as capability decks and case studies, didn't fit the narrative the company wanted to pursue and the locked-in page-wise information architecture.
- The engineering and product teams had other priorities, which delayed our scoping exercise. The in-house team was already stretched too thin to referee it.

OUR APPROACH

Purple Iris assigned a senior writer as the project manager with overall responsibility for conducting the audit, collecting and reviewing resources, coordinating with the client's marketing team, and ensuring the project moves smoothly. We set up a governance structure with names of owners, reviewers, and approvers assigned to each page. We assigned a priority order to pages based on practical considerations, such as the availability of inputs and the extent of rewrite a page demanded.

The results were:

- A gap analysis of each solution page so all the stakeholders are aligned on messaging, buyer priorities, competitive positioning, and evidence needed to establish authority
- A faster and smoother path to rebuilding a new website, with two weeks devoted to content scoping and six weeks to content refresh
- Freeing up bandwidth of the client's marketing team to focus on immediate priorities even as the complex website project takes off
- A governance map for the team to reuse without renegotiating ownership for the next refresh



Decisions to make before the redesign starts

A website refresh can lose direction long before anyone opens the design file. A handful of decisions keep the work tied to the business, the buyer, and the pages that need to earn a place on the new site. Keep them visible from the first audit through the first 90 days after launch.

What are some mistakes to avoid?



Don't start with the sitemap.

Start with business objectives, since everything downstream depends on what the refresh is actually meant to achieve.



Don't let design determine content.

Content and information architecture should inform the design brief.



Don't migrate every page blindly.

Some content should die, and the decision matrix above exists precisely to make that call on evidence instead of instinct.



Don't treat AI visibility as keyword stuffing.

It means making the company's expertise explicit, structured, and backed by evidence that an AI system can actually verify.



Don't measure success by launch.

A live site is a milestone. Measure the commercial impact over the following 90 days.

Can it wait until next year?

It can, but not for the reason it feels like it should. The instinct to push scoping off usually comes from treating it as one large project instead of six phases with different time commitments. The diagnosis phase alone runs two to three weeks and produces a scorecard worth having on its own, even if the rest of the roadmap waits for a bigger budget cycle.



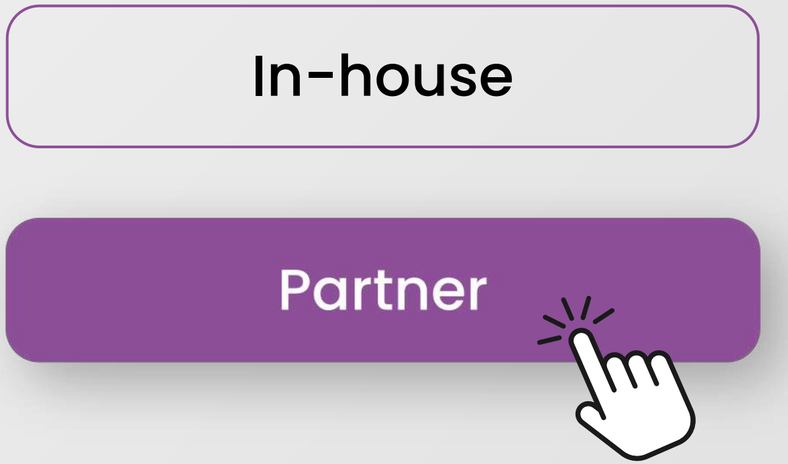
What can't wait is the cost of not knowing.

Every month, the site keeps making claims the business has already outgrown, and a prospect is more likely to catch that ahead of your own team.

In-house or a partner?

The next big question to ask: who will lead this project? The in-house team has a big role to play in guiding it, but it may not have the bandwidth to run it end-to-end. Collaborating with an external partner ensures other priorities don't stall progress. A content agency with experience in website projects can add value by advising the in-house team on new industry practices and offering an informed, outsider's perspective.

A few signals help make the call early. If the last full content audit happened more than 18 months ago, or if editorial ownership currently sits with whoever has time that week, in-house capacity is usually thinner than the org chart suggests.



How do I find the right partner?

If a partner is what you're looking for, vet them with the same rigor this guide asks of the work itself.

- Have they conducted complex and extensive content audit and content refresh projects?

- Have they built a redirect map, or only reviewed one someone else built?

- Who on their team owns the project once the kickoff energy wears off? A job title instead of a name usually means nobody has been assigned yet.

- Do they bring a repeatable framework, like the 10-part structure above, or start from a blank page every time?

How to get all stakeholders on board

Don’t leave stakeholder ownership until the build.

Decide who provides input, who reviews, who approves, and who owns each page before content and design are locked.

Each stakeholder only needs to join the parts of the framework that touch their work.

A redesign is only as good as the content decisions behind it. At Purple Iris, we carry out complex scoping exercises, from pre-scoping audits through stakeholder governance. Our team uses its deep experience and a tried-and-tested in-house framework to ensure these strategic, cross-functional projects stay on track and achieve their objectives.

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Purple Iris Communications is a B2B content agency that helps brands find differentiation in the age of sameness. For more than 15 years, we have worked with CMOs, business leaders, and company founders to turn expertise into authentic brand voices and distinctive points of view.

We apply business understanding, audience insight, and editorial judgment to every brief, uncovering the thinking behind each idea and creating content that builds authority and business impact.

We are listeners and thinkers first. Writers next.

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