

# Core Monetization Terminology Playbook

A content design project for Instagram



# Overview

## **Problem:**

Nebulous terms like “layout” and “format” were becoming pain points in the design process due to ambiguity of use.

## **Context:**

- Multiple IG teams were stakeholders in the use of this language
- Not only Instagram but also Meta as a whole communicates using this vocab, so any solution would have to be compatible with other Meta orgs.

## **Solution:**

I embarked on a two-month project to get context on the state of terminology usage at IG and Meta, ultimately getting buy-in on a new content guide to socialize with design teams and beyond.

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# Project Plan

## Phase 1: Gathering Context

Gather context on usage, both from extensive interviews with stakeholders and reviewing a wide range of internal documents.

## Phase 2: Descriptive Report

Synthesize a summary of current usage for each term of concern, particularly re: conflicting definitions.

## Phase 3: Proposals and Consensus-Building

Schedule a series of meetings with the stakeholders I met with before to hammer out an agreed-upon set of definitions going forward.

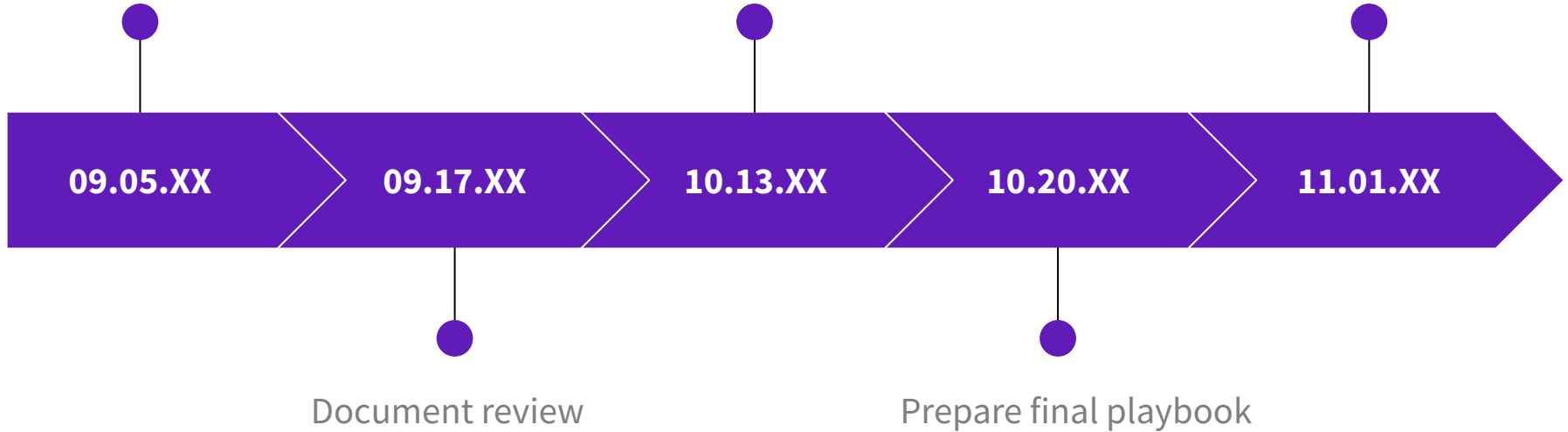
## Phase 4: Socialization

Spread the playbook beyond stakeholders to IG and Meta at large.

Interviews

Meetings

Socialization



# Implementation



# Phase 1: Gathering Context

## Interviews

- I put out a call internally and reached out to dozens of people individually.
- I ended up speaking to around 15 key individuals about how they use the key terms in their day to day design work.

## Document Review

- I went through high-level design strategy roadmaps, project briefs, and more.

# Phase 2: Descriptive Report

## Compilation of Definitions

- For each term of concern, I created a detailed Wiki-like entry that centralized key data about its usage.
- I cited information from the interviews and documents I used to create the report.

## Summary of Major Conflicts

- Each definition included a comparison of the main differences in how people used the term.

# Phase 3: Proposals and Consensus Building

## Summarized Recommendations

- Based on the context I'd gained in the research phase, I noted the definition I thought made the most sense for each term.
- I included my rationale for my decision, plus citations.

## Led Discussions

- I scheduled meetings with the key stakeholders for each of the most important terms.
- Together, we came up with working definitions for going forward.



# Phase 4: Socialization

## Meetings

- I've been visiting weekly and monthly team syncs to announce the content guide and take questions.
- One-on-one meetings with key team leaders and managers has also been a big help in spreading the word.

## Asynchronous

- Posts on Meta messaging groups and in group chats have raised awareness about the guide.

# Pain Points

## The Reorganization

- Throughout this project, I found the organization a bit murky due to the re-org going on over the entire company.
- It was sometimes difficult to find out who owned what, so I had to do a lot of networking and fact-checking!

## Coordination

- Finding meeting times was the least of my worries; the competing needs of everyone involved were often difficult to navigate!
- Getting buy-in from a couple key stakeholders right away was instrumental to clearing a path for this projects success.

# Results



# Major Wins:

## Commitment to internal syncing

People responded well to the guide, and showed they were enthusiastic about solving the terminology problem!

## Clarity across teams and orgs

Now, there's a set source of truth people can go to in the case of any confusion.

## Alignment for the future

Going forward, everyone has a way to stay in sync.

# Next steps:

## **Spread to Meta, tweaking as needed**

It'll be important for the long-term success of the content guide to follow through on the goal of involving people all over the Meta org chart.

## **Develop methodology for major overhauls**

When I eventually move on, we'll need to figure out how this can stay relevant over time. Maybe a specific team's content manager might be right for that responsibility!

## **Integrate the guide with other content resources**

The guide is joining an impressive body of content guides at Instagram, so hopefully there will be ways to backlink the guide in other design docs and connect it with other ongoing design guide efforts.

**Thanks for  
reading!**

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