EBOOK

How to Document Your Content Marketing Workflow: A step-by-step guide

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Contents

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Introduction

Content marketing is rapidly becoming a key element to effective marketing strategies. Yet, in this relatively new field, many content marketers still face an uphill battle to establish their value to CMOs and other executives. Currently, only 49 percent of marketers say their firms have an executive who leads content marketing.[1] This lack of leadership from the top means that content marketers must find a way to prove themselves if they want to ensure a seat at the decision-making table, get a budget, and prevent content needs from simply being "outsourced."

While a lot of content marketing practices are still being refined, one practice that is already proving effective is having a documented content marketing strategy. Similar in importance is a documented workflow. A documented workflow provides structure and increases the efficiency of executing the work. With a documented workflow, content marketers reduce chaos, increase clarity, improve communication, decrease rework, speed approvals, and save time—all of which allows for more time to create engaging, on-target content.

In this eBook, we break the content marketing workflow into five main stages and give you a checklist of items to consider as you map out each stage. We recommend that you get all your content creators or content marketing team together in one room and map out your current workflow on a whiteboard as you go through the steps in this book. Doing this visually first will help you see areas where you can make tweaks. Plus, you can engage the entire team in creating the process.
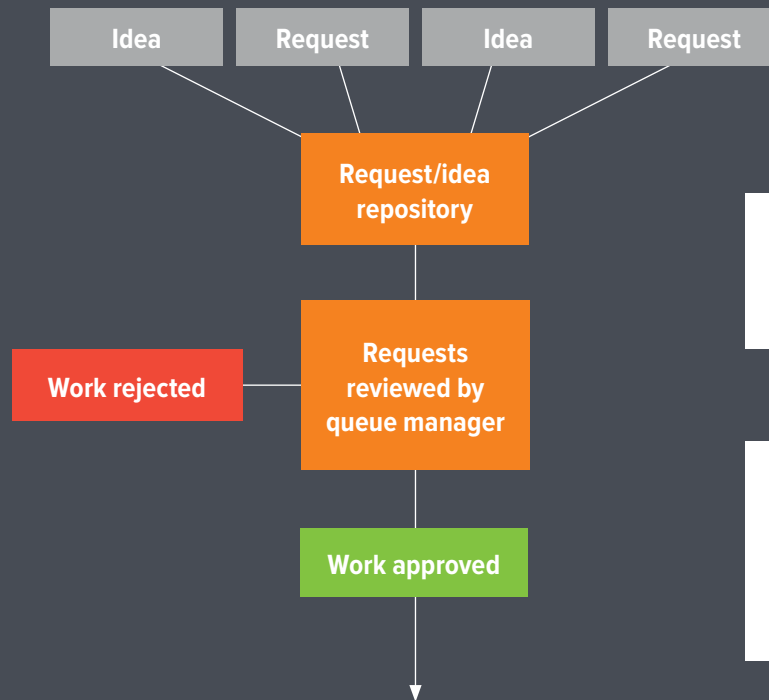
53% VS. **40%**
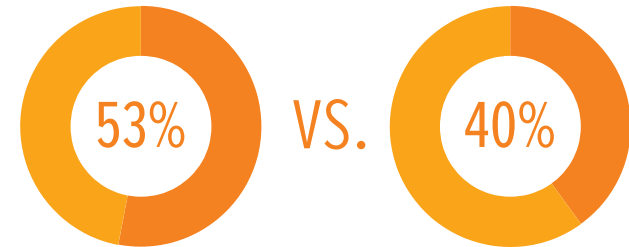
53% of the most effective marketers have a documented content marketing strategy compared with 40% of the least effective marketers who have no strategy at all.[2]

60% VS. **32%**
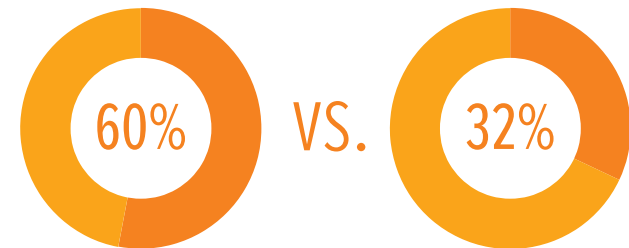
60% of those who have a documented strategy rate themselves highly in terms of content marketing effectiveness, compared with 32% of those who have a verbal strategy.[3]

Idea   Request   Idea   Request

Request/idea repository

Work rejected

Requests reviewed by queue manager

Work approved

❶ Requestors/Team Members fill out content brief and submit content requests or

ideas to _____ .

Name of request repository

❷ The Queue Manager, _____

Name of content marketing manager, managing editor, etc.

reviews all requests and ideas and either approves or rejects them. If approved, they

move on to prioritization. If rejected, they go _____ .

Generating good content ideas is one of the hardest parts of content marketing. But good ideas can be fleeting if you don't have a way to capture them—ideas floating around on sticky notes or bounced off team members in the hallway tend to become lost or forgotten—as do ad hoc content requests from other departments. In order to remember all your good ideas and not lose track of requests, it's important to have a process in place to capture and manage all content requests and ideas.

To document this aspect of your workflow, first do the following:

☐ **Create a central location or repository for request and idea submissions.** Require that all content requests and ideas be submitted through an email address, a shared spreadsheet, or a cloud-based request management tool. Prioritize and assign requests from there. The goal: one, single repository for all content ideas and requests.

☐ **Use a content brief or request form.** Use a simple content request form, an online form, a content brief, or a work request management tool to capture and formalize the idea or request so it's clear what needs to be done when it's time to execute the work.

☐ **Identify who needs to approve or review ideas.** Your sales team, internal subject matter experts (SMEs), or executives may all need to review and approve topics before you can move from idea to executable concept.

☐ **Determine how much time your team needs to spend on strategic ideation.** By doing so, you can set aside enough time to ensure you generate ample ideas for each month or quarter.

☐ **Determine the sequence.** Map out what has to happen and in what order—brainstorm, cull ideas, get approval, fill out a request form, etc.

☐ **Identify who will be involved in content requests or ideation.** This will likely include the key members of your team—campaign managers, copywriters, content marketing directors—as well as relevant stakeholders and SMEs in other departments. Inform all involved about the workflow process for submitting content requests and ideas.

☐ **Communicate this process to your team/stakeholders.** Whether you send out an email or hold a meeting, everyone needs to know how to handle requests and ideation. Then stick to the process—if someone stops you in the hall to request work, kindly remind them to follow the process if they want their request considered.

"The expectation from the consumer today is: Engage me; make me laugh; make me think. That requires creativity and constant planning." [4]

Once you have answers to all these questions, sit down and map out the workflow, step-by-step. Whether it's a flow chart, a checklist, a project template, or something else, document the process and share it with any teams or individuals who may be involved in this part of the flow. With these steps, you can streamline both the process of generating good content ideas and of managing those ideas. You'll be less likely to lose or forget ideas and you'll have a system in place to ensure you have buy-in from stakeholders before you begin executing the work.

② Prioritization

Prioritize work

Work planned in editorial calendar

❸ The Queue Manager, _____

Name of content marketing manager, managing editor, etc.

prioritizes all approved content requests and ideas using a scorecard or another

prioritization method. Work is then planned and added to the editorial calendar.

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Once you have an operating repository of requests and ideas, the next step is figuring out how to prioritize and schedule the work. This is one of the most important steps in the workflow. To ensure you can meet your strategic goals and prove your return on investment (ROI), weigh each piece of content against the others and prioritize it in alignment with your company's strategic initiatives.
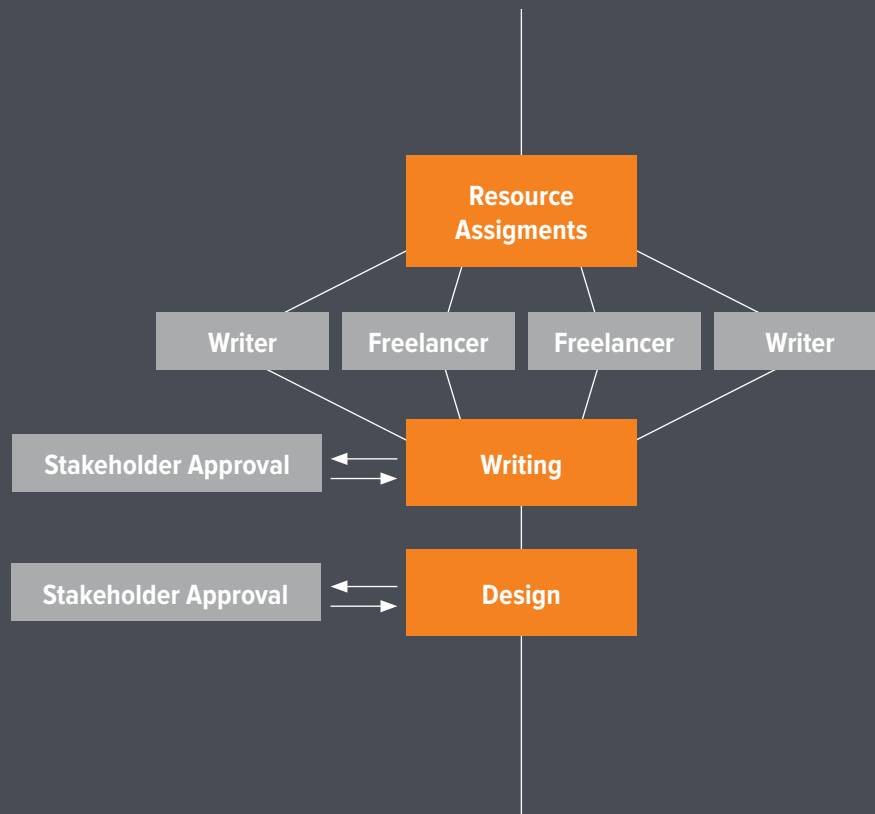
To document this aspect of your workflow, map out the following:

☐ **Determine who will prioritize requests.** A content marketing manager or a managing editor might be a good fit for this role.

☐ **Establish a method for prioritizing content.** You can use a scorecard, a tiered system based on the complexity of the project, your editorial calendar, or urgency. For example, evergreen content may be a lower priority than content accompanying a recently released research report. Regardless, come up with a system to help you weigh each idea and request by importance. You may also want to leave room for "fun" or "risky" content pieces to try on the side.

☐ **Communicate content priority status with your team/stakeholders.** A work management system, a shared online spreadsheet, or a central whiteboard with content listed according to priority are some ways you can provide the entire team with visibility into the priority of each piece of content.

☐ **Add work to your editorial calendar.** Your editorial calendar provides two things: a hard deadline for when you expect the content to be published and context for how the individual pieces work together to drive the audience to larger actions or goals. Plan calendars a week, a month, a quarter, or more in advance to help determine the priority of different pieces of content.

"Without a centralized, strategic alignment to why and how content is being produced...companies too easily fall into the trap of 'we need a blog, or a Facebook page, or a microsite.' Efforts are unaligned with goals and appear scattershot." —The Altimeter Group[5]

When content is strategically prioritized to meet business goals, you'll find that you are able to prove your value by hitting important business targets, such as driving more quality leads, generating greater brand awareness, or increasing website traffic.
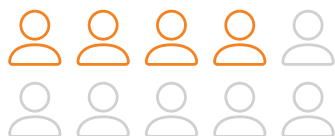
③ Content Creation

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                    │   Resource   │
                    │  Assigments  │
                    └──────────────┘
         ┌──────────┬─────────┼─────────┬──────────┐
    ┌────────┐  ┌──────────┐  ┌──────────┐  ┌────────┐
    │ Writer │  │Freelancer│  │Freelancer│  │ Writer │
    └────────┘  └──────────┘  └──────────┘  └────────┘
```

| Stakeholder Approval | ← | Writing |

| Stakeholder Approval | ← | Design |

❹ Work planned in the editorial calendar is assigned out to writers, freelancers, subject matter experts, or agency talent by _____ .
Name of role

❺ Writers use the specific workflow template for the appropriate content type, work is iterated on, and reviewed/approved accordingly. It is then sent for design (if needed), by _____ , until the final asset is approved.

Once it's time to dive into a project, you need to think about what the execution process looks like. Content marketing workflows contain a lot of moving parts, including keeping approvals on target. Documenting the order of each task in advance, and the estimated time these tasks take, helps ensure that you meet your publish dates.

To document this aspect of your workflow, map out the following:

☐ **Identify who will work on what.** Most projects require more than one resource. Identify all roles required (copywriter, graphic designer, reviewers, etc.) and which individuals you assign to specific tasks. As part of this process, you need to carefully plan out all tasks, subtasks, and milestones so you know who executes what, and at what stage.

☐ **Identify who needs to review and approve the content.** Different drafts may require different reviewers, so be sure to identify not only who needs to review the project, but at what stage they need to review it, including ideation, content creation, and layout and design.

☐ **Determine the number of revisions the project requires.** The appropriate number may vary depending on the complexity of the project. A blog post may only go through only one round of revision, while a lengthy resource guide may require three or more rounds.

☐ **Determine the time it will take to create the content.** Work with your team members to create solid estimates for how long each part of the creation process takes as well as how long the entire project takes. For example, a blog post may only take eight hours, but a white paper may involve closer to sixty or seventy hours of time.

69%

More than 4 in 10 content marketing professionals said a lack of an effective strategy—and likely creation and distribution of content as a result—was an issue.[6]
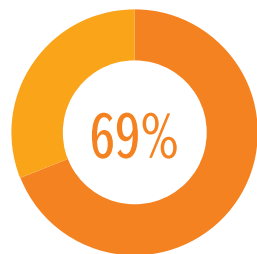
69% of content marketing lacks impact, according to a recent study by Acrolinx.[7]

Once you've answered these questions, make templates for repeatable types of work. This not only helps define who is responsible for what and when, but allows you to build in enough time to create a steady pipeline of quality content.
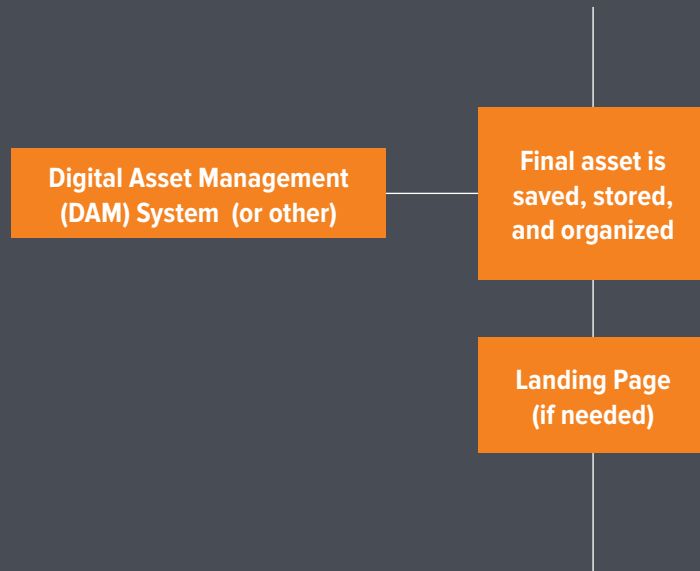
Digital Asset Management (DAM) System (or other)

Final asset is saved, stored, and organized
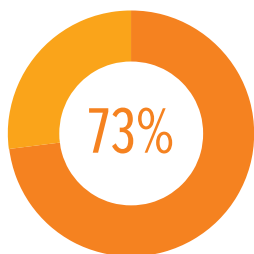
Landing Page (if needed)

6 The final asset is saved and stored in the appropriate DAM system, CRM system, file

drive, etc., by _____ . Content is published to a landing
Name of asset manager

page, by _____ , if needed.
Name or job role

You and your team have enough on your plate without wasting time looking for files. In fact, most workers spend about 2.5 hours per day, or roughly 30 percent of the workday, searching for information.[9] Think about how much amazing content you could craft with 30 percent more of your team's time! So before your content starts collecting cobwebs in an email inbox or on a disorganized shared drive where no one can find it again or decipher which version is actually the final version, you need to get a system in place that guarantees this won't happen.

To document this aspect of your workflow, map out the following:

☐ **Determine where final files are stored.** Will you use a Digital Asset Management (DAM) solution? A shared drive? Or a cloud-based storage like DropBox?

☐ **Establish standardized naming conventions.** How will everyone know which file is really the final file? Create a naming convention, such as filename_final.doc.

☐ **Ensure files are stored and named properly.** Clearly outline in your processes which team member saves the document and places it in the correct storage location. Is it the content manager's job? Is it the designer's job?

☐ **Communicate this process to your team/stakeholders.** Add the template for version control and storage to your regular content templates, such as your template for creating an eBook. This effort reminds those involved in creating and reviewing the content what the proper steps are.
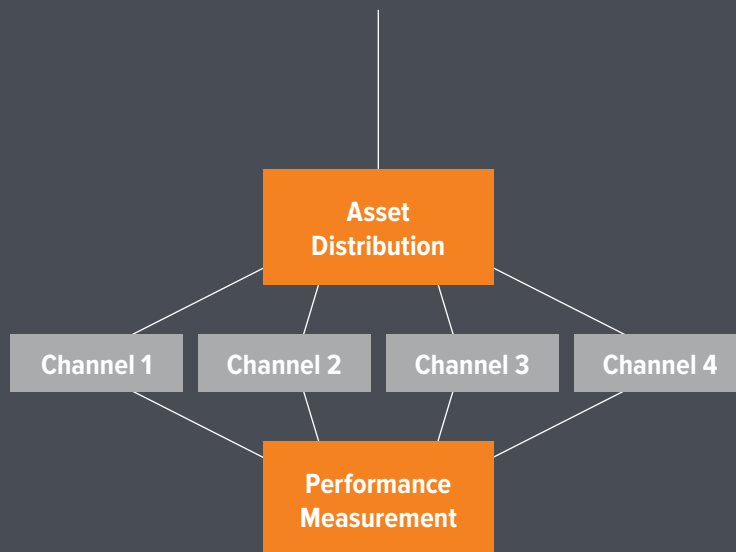
With the right processes in place and documented, you'll avoid wasting time searching for content files, eliminate rework that occurs when you can't find the right file and have to "update" an older version, and make it easier to quickly repurpose content.

73%

73% of top performing content marketers have centralized assets and content.[10]

Over five years, a company that uses DAM can save $120,938 on workflow efficiency, $4,300 on asset re-creation, and $64,500 on DRM compliance—that's over $189,000.[11]

Asset Distribution

Channel 1 | Channel 2 | Channel 3 | Channel 4

Performance Measurement

❼ Content is sent to _____
Name of distribution, demand generation, or social manager

for distribution and promotion in any and all appropriate channels. Content

performance is then measured according to key performance indicators (KPIs).

The hard work of creating your content is over, but it's wasted effort unless you publish and promote your content to the right audience. To ensure success, you need to document the publishing process so that you don't miss any steps and so that everyone knows their role.

To document this aspect of your workflow, map out the following:

☐ **Determine how you want to distribute your content.** Social media? Paid advertising? Media pitching? Email drip or nurture? A combination of these? Decide this for each piece you produce. If a piece doesn't have a good purpose, don't produce it.

☐ **Identify who is responsible for the content's distribution.** Is it the content marketing team? The demand generation team? The social team? Does it need to go to multiple teams and vendors? Then, communicate your content plan with them so they what's coming.

☐ **Document what else needs to be done.** Does distribution require additional work? Landing page content? Social content? Document any additional steps.

☐ **Establish how you will measure content performance in each of these channels.** For example, will you look at click-through rates, number of shares, increased website traffic, or content downloads to measure the impact? How will you gather this data?

☐ **Communicate this process to your team/stakeholders.** An editorial calendar is a great place to communicate who is responsible for what and where content will be promoted. It could even include a place to track performance metrics.

Once you've answered these questions, create a promotion calendar to track all of the details listed above. By having a documented workflow for publishing and promoting your content, you'll reduce the chaos around this activity, improve clarity about everyone's role, and spend less time reinventing the wheel every time you need to promote your content.

Content marketers with a documented content marketing strategy are the most likely to say they publish new content daily or multiple times a week.[8]
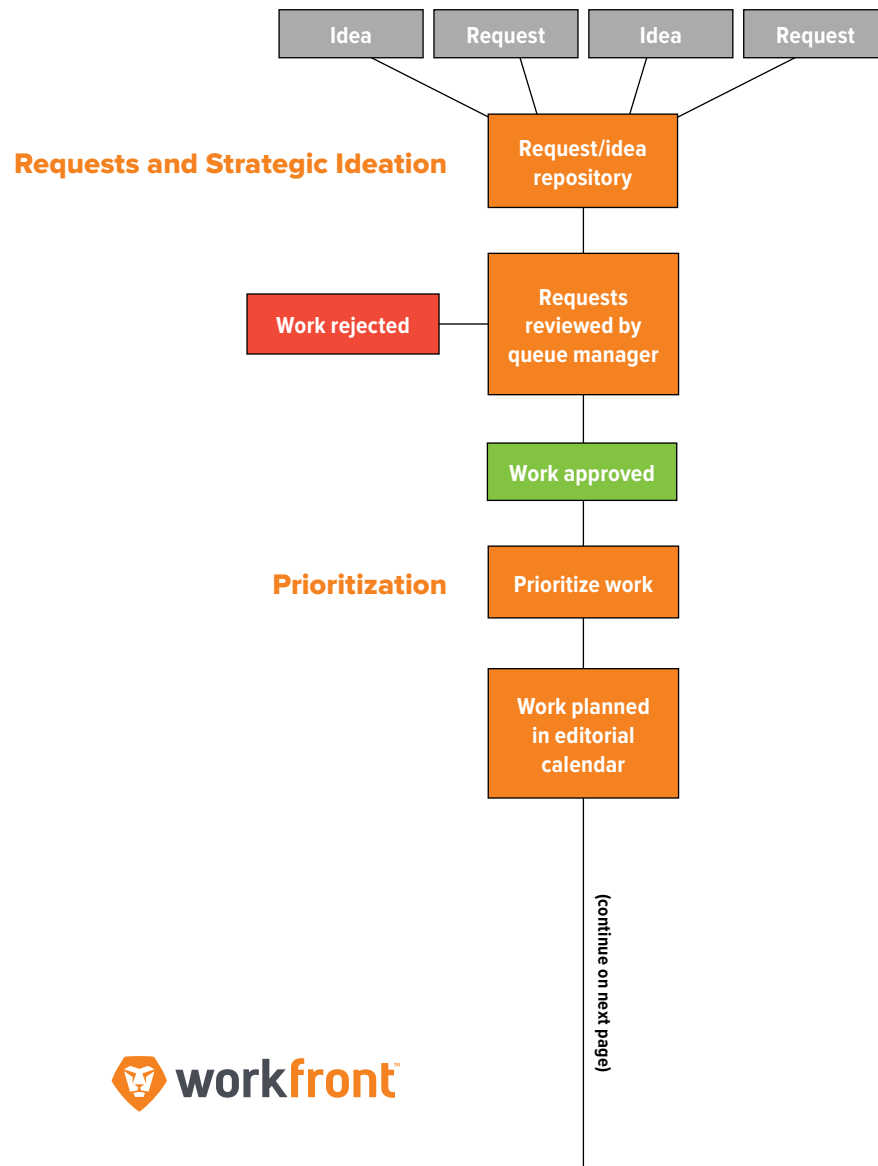
7x

Top performing content marketers are seven times more likely to invest in technology to help streamline their content processes.[13]

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Conclusion

Now that you've got everything mapped out on your whiteboard, simplify it, refine it, and have someone on your team create a digital version of it. Print out the digital version as a reference, and share the digital version with relevant team members so they will know how to work with your team more efficiently in the future. Having a documented workflow in place will enable your team to run with your content marketing strategy. What's more, it will help you create a repeatable, standardized process so you can better scale your content efforts moving forward.
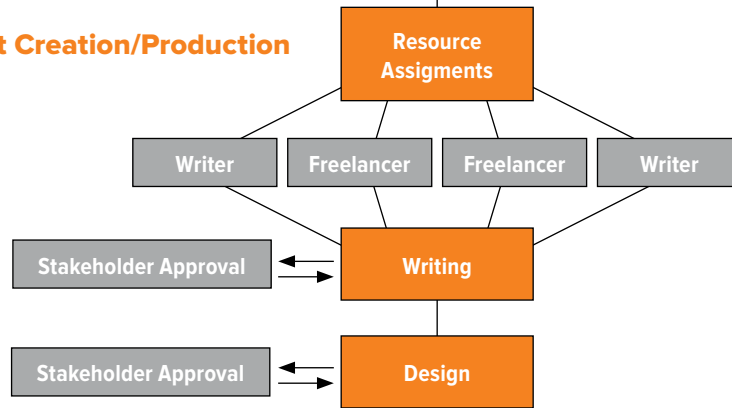
"Despite an overwhelming trend toward content marketing and the need to continually feed an ever-increasing portfolio of content channels and formats, most organizations have not yet addressed content on either a strategic or tactical level."[14]

Complete Content Marketing Workflow Template

Idea	Request	Idea	Request

Requests and Strategic Ideation

Request/idea repository

Work rejected — Requests reviewed by queue manager

Work approved

Prioritization

Prioritize work

Work planned in editorial calendar
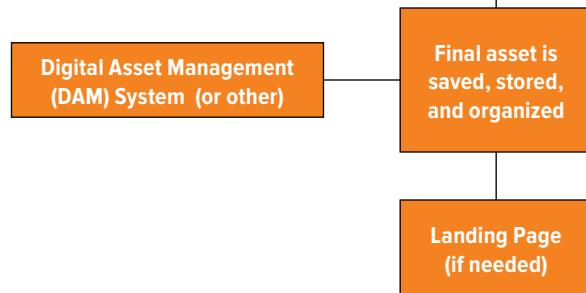
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❶ Requestors/Team Members fill out content brief and submit content requests or ideas to _____ .

Name of request repository

❷ The Queue Manager, _____

Name of content marketing manager, managing editor, etc.

reviews all requests and ideas and either approves or rejects them. If approved, they move on to prioritization. If rejected, they go _____ .

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Name of content marketing manager, managing editor, etc.

prioritizes all approved content requests and ideas using a scorecard or another prioritization method. Work is then planned and added to the editorial calendar.
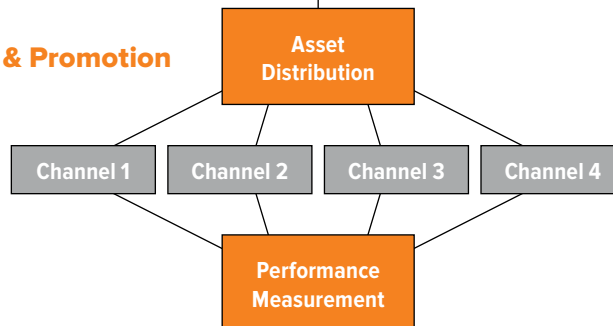
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Content Creation/Production

Resource Assigments

Writer | Freelancer | Freelancer | Writer

Stakeholder Approval ← Writing

Stakeholder Approval ← Design

Content Organization & Storage

Digital Asset Management (DAM) System (or other) — Final asset is saved, stored, and organized

Landing Page (if needed)

Content Publication & Promotion

Asset Distribution

Channel 1 | Channel 2 | Channel 3 | Channel 4

Performance Measurement

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4 Work planned in the editorial calendar is assigned out to writers, freelancers, subject matter experts, or agency talent by _____ .

Name of role

5 Writers use the specific workflow template for the appropriate content type, work is iterated on, and reviewed/approved accordingly. It is then sent for design (if needed), by _____ , until the final asset is approved.

Agency, creative services, or freelancer

6 The final asset is saved and stored in the appropriate DAM system, CRM system, file drive, etc., by _____ . Content is published to a landing

Name of asset manager

page, by _____ , if needed.

Name or job role

7 Content is sent to _____

Name of distribution, demand generation, or social manager

for distribution and promotion in any and all appropriate channels. Content performance is then measured according to key performance indicators (KPIs).

Make documenting your workflow simple with Workfront

Now that you know the essential elements to a content marketing workflow, you can document your team's workflow and start to gain more time for quality content creation. With the Workfront Marketing Work Cloud, the details and management of your team's entire workflow exists in a single location, helping your team:

- Eliminate unnecessary administrative tasks

- Streamline work processes

- Focus more time on creative activities

- Improve your team's productivity

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