



THE COMPLETE GUIDE TO  
**INFLUENCER MARKETING:**  
STRATEGIES, TEMPLATES & TOOLS



"Influencer marketing is getting others to share your story, generate interest, and make your case."

– Ardath Albee

Welcome to *The Complete Guide to Influencer Marketing: Strategies, Templates and Tools* – a manual for marketers looking to build or expand their influencer programs. Here we've gathered some of the smartest practices in the industry, using codified templates and vetted tools to assist you through your journey.

Although you may already know *why* you need an influencer marketing program (and, if you don't, see the next page), the looming question remains: How do I even begin to build one? So, we're here to help you build a manageable, measurable and scalable program regardless of your level of expertise.

Keep reading to learn more; we're here to help.



**Joe Pulizzi**

Founder,  
Content Marketing Institute

# 1 MAKING THE CASE FOR INFLUENCER MARKETING

While the passion and desire may exist for building an influencer marketing program, there are some common barriers many companies face when trying to start a program, including awareness of what influencers are and a basic understanding of how influencer marketing programs work. To help you justify such a program within your organization, here are a few insights and talking points from the experts that you can leverage as you make your case.

To quote a [recent article](#) published by [Amanda Maksymiw](#), *“As marketers are looking to turn up their content marketing efforts, many are turning to influencers to help take content to the next level. Why? Influencers can lend credibility to a piece of content or brand. They can help amplify reach and awareness which, in turn, helps ensure that the desired target audience will consume the content. Companies can also piggyback on an influencer’s brand to get a jump-start on developing their own brand preference and thought leadership in the market.”*

This method of tapping into influencers to help amplify your content marketing strategy is otherwise known as “influencer marketing.” It’s a pretty straightforward concept when you think about it:

- Influencers have a pre-established audience who are already receptive to their ideas and recommendations; they are valued by your consumers;
- Influencers have a built-in level of trust with their readers, one that’s essentially impossible for a brand to build. So, they will forge these strong connections on your behalf and help you build credibility;
- They can help you create the right content that really meets your consumers needs, because they have “on the ground” experience and perspective; and
- By partnering with them, you’re able to get your brand messages out in the right way, at the right time, to the right people.



“A brand can never represent the perspective of another

consumer since they are still the maker of the product. What influences consumers is the voice and experience of like-minded peers and people in their situation.”

**Holly Hamann,**  
co-founder, TapInfluence

## Why does my company need an Influencer Marketing program?

There are dozens of reasons your company could benefit from investing in an influencer marketing program. Here are just a few eye-opening facts from a recent Branderati report; *26 Stats Marketers Should Know*:

### Boost your reputation and build better connections

- As a brand you will never have the ability to truly connect with your consumer in the ways that an influencer can.
- “Customers referred by other customers have a 37% higher retention rate.” (Deloitte)
- “Offers shared by trusted advocates convert at a 3x-10x higher rate than offers sent by brands.” (Zuberance)
- “Brand advocates are 70% more likely to be seen as a good source of information by people around them.” (Marketingcharts)

### Keep up with your peers

- Social Media Today reports “74% of global marketers reported they will use ‘influence marketing’ as part of their marketing strategy in the next 12 months.”

### Break through the “clutter”

- In this day and age of ever-cluttered newsfeeds, clogged inboxes and overloaded search results, messages that cut through all that will be those from trusted resources.

Like any of your content marketing strategies, however, achieving a successful influencer marketing program does not come without its challenges and complexities – and there is no silver bullet. We’ll discuss ways to overcome these in the sections to follow.



“There is only so much you can write about your product or to your ideal customer persona before you begin repeating yourself... Often the best assets are the by-product of collaboration between internal and external contributors.”

**Joe Chernov,**  
VP of Content, HubSpot

## 2 IDENTIFY THE GOALS OF YOUR INFLUENCER MARKETING STRATEGY

Just as you need a strategy for your content marketing program, you also need one for your influencer marketing program (especially when you think about how fast-growing the practice of influencer marketing is for your peers – and competitors.)

Before launching your influencer program, you need to understand — and document — what you specifically want to accomplish. Said another way: How will your influencer marketing program help you achieve your business goals?

These objectives can and should change by program, as well. For instance, your objectives may be dramatically different during a new influencer marketing program vs. your program in year two. Some potential objectives to consider or use as a starting point to build your own list of goals:

**Brand awareness:** How many people viewed, downloaded, or listened to this piece of content because of the influencer?

**Engagement:** How resonant is this content, and how often is it shared with others? How is the influencer helping to increase sharing?

**Lead generation:** How is the influencer helping to convert people into valuable leads?

**Lead nurturing:** Does interaction with the influencer help move a lead closer to a sale?

**Sales:** Did you make money because of this content shared by the influencer? What revenue or ROI can we apply to this program?

**Customer retention/loyalty:** How can an influencer help retain a customer?

**Upsell / cross-sell:** Is there a way to use an influencer to help someone become more invested in your business?



"Amazing content that no one ever sees serves your business exactly as well as no content at all. In order to turn your knowledge into an effective marketing tool, you must get on the radar of the people who make up your target community."

**Firepole Marketing**

## 3 IDENTIFY INFLUENCER TYPES

The type of influencer you need will depend on what your specific objective is (as outlined in section 2). For example, if your aim is awareness/broad reach, you may choose a bigger number of influencers to work with who can all produce “bite-sized” pieces of content to increase your share of voice. But, if you are looking to retain customers or upsell, you will likely want to use other clients as influencers.

### How Can You Identify the Right Influencers?

Influencers can come in many different forms. From inside your organization outward, they can take the form of:

- Bloggers
- Customers
- Members of a purchasing group
- Industry experts and analysts
- Business partners
- Internal team members or experts

## INFLUENCER

People who have an established credibility and audience; who can persuade others by virtue of their trustworthiness and authenticity. Influencers can come in a variety of forms (which we’ll review later on).

Note that advocates are not necessarily influencers, because even though they might be your biggest cheerleaders they may not have the power or credibility to extend your messages very far beyond their immediate circle.



Note that while we’re not discussing how to get press in this particular guide, we recommend [The Hacker’s Guide to Getting Press](#) in case you’re interested in pursuing that avenue for your content.



For more information about the different types of influencers you can tap into, check out this [video](#) featuring our friends from CMI.



## 4 DECIDE WHO WILL MANAGE YOUR PROGRAM

Now that you've established what you're trying to achieve with your influencer marketing program and who you'd ideally like to reach, you will have a better understanding of whether or not you have the right resources in-house to do the work needed.

While starting off with a test pilot group may be harder to measure — as results will naturally be smaller than any larger-scale program — it's best to see what you're able to do in-house by trying it out first. Remember, no one knows your company's voice, style, content, and heartbeat like those who work internally, so finding ways to leverage that passion in your program, whether working on your own or with partners, is ideal.

Once you have a better understanding of your internal capabilities, you'll then be able to determine what size program you can manage, and what other resources you'll need to engage to deploy the program that will meet your objectives.



### Some things to consider:

- How much capacity does your internal team have for taking on a pilot group of influencers?
- Do you have any tools in-house available (ones you use for social listening, content management, etc.) that you can leverage for an influencer marketing program? See section 9 for more on tools.
- Are your agencies or other business partners able to assist for a nominal fee or even as a trial?

## 5 CREATE CONTENT WORTH SHARING

In order to get influencers to work with you, to truly *partner with you* in amplifying your content, you're going to need something crucial: **great content**. Time and time again, influencers will push back on brands for forcing overly promotional messages into their hard-earned sites, because authenticity is the piece that keeps trust between them and their readers and no one — not even your brand — is worth jeopardizing that. So, in short, as perfectly stated by [Andy Newbom](#), “create something for influencers to influence on.”

This also means that your content should have a very clearly defined **mission** or purpose; it's a lot easier for influencers to get engaged in, and supportive of, your content if it clearly stands for something they can relate with or also feel passionate about.

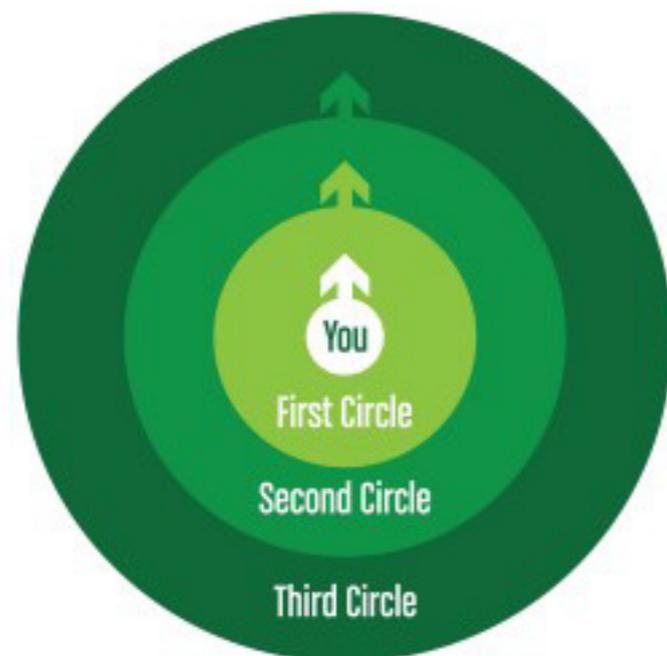


“To be really successful with influencer marketing, you'll need to put together a content marketing plan; one that will help you build influencer relationships that will extend beyond a single content collaboration.”

**Amanda Maksymiw,**  
VP of Content, Lattice Engines

## Strive for content that will attract more than just your fans

Are you familiar with Scott Stratten's *Three Circles of Content Sharing*?



We have previously written about the power these circles have over the success of your content marketing strategy. The first circle signifies people closest to you, the second is the friends of those people in the first circle, and the third being those “friends of friends” or, as we put it, the “Holy Grail.” Why? Because, “if the third circle shares your content, they will do it solely because it’s amazing information that they feel is worthy of being shared.”

*\*source: <http://contentmarketinginstitute.com/2012/10/influential-content-marketing/>*

This has great implications into how you structure your influencer marketing program. **Think of that third circle when creating your content; will the top influencers be compelled to engage with it, or share it, or are you still speaking to the same audience of uber-fans who will love your content no matter what (even if it’s a bit weak)?**

Now, even if you achieve success in creating amazing content that influencers will love to share, how do you go about finding the right ones for your company?

Let’s explore how to find the best influencers to meet your objectives.



To find out what kind of content is truly valuable, use the data at your disposal. Ben Harper walks you through the essentials of

**how to use data to improve your content marketing strategy.**

## 6 BUILD YOUR POOL OF INFLUENCERS

Does your influencer marketing program ever feel like a spiraling rabbit hole? It's because there are so many potential paths you can take, and the potential pool size of influencers to tap into can feel somewhat overwhelming. Here's what typically runs through a marketer's mind when beginning to launch such a program:

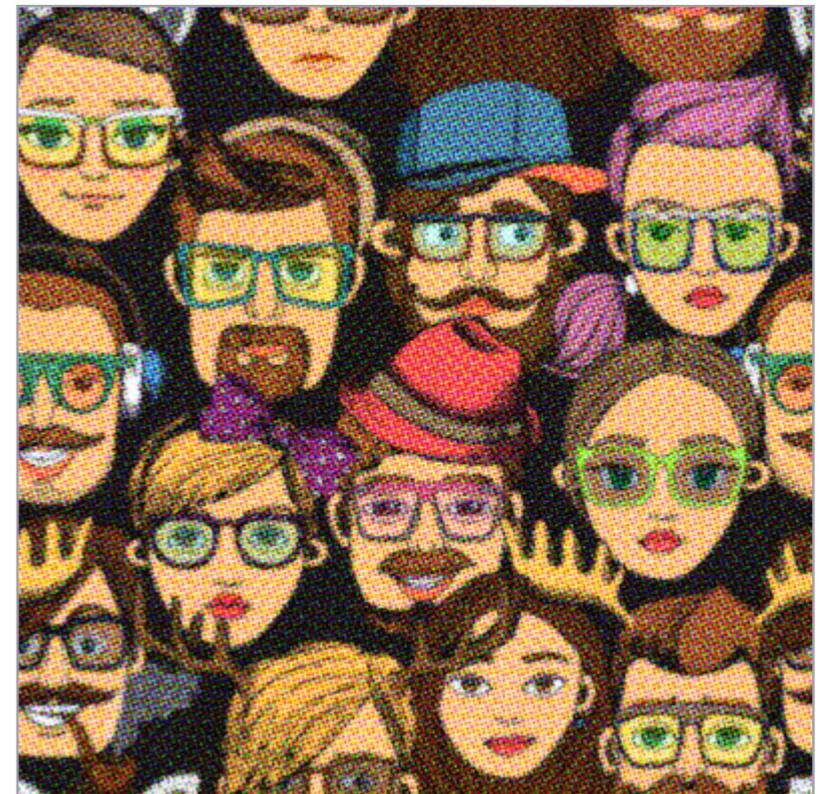
- Who do we even reach out to?
- How do I know "who's good" and who has powerful influence?
- How do I even manage influencers once I start working with them, especially this influx of content?

These unknowns can feel daunting for any team, of any size and any level of experience. To help get you started, these are the next **three steps we'd recommend taking when kicking off your influencer program.**

- 1) Build a small pool of potential partners and learn more about them.
- 2) Begin your influencer outreach.
- 3) Test, assess, and optimize.

The first step to building your pool of influencers, after setting your objectives and identifying the influencer "types" with whom you want to work, is to sit back and listen.

Sounds pretty passive, but taking the time to truly understand what your potential influencer's focal points are will be crucial in understanding how you can work together.



To start, consider building a template that will help you keep track of the top people with whom you'd like to work. It's likely you already have some kind of list, but having a consistent way to keep track of them and assess them is an important place to start.

**Here is a template you can tailor to track whatever metrics you think are most important:**

Blog Name	URL	Blogger Name	# Visitors/ Mo	Facebook/ Followers	Twitter/ Followers	Instagram/ Followers	Other/ Followers	Content Quality Score	Blog posts in Industry?	Affinity to company?	Consistent with Brand Values?	Sample posts	Recommend for program?
<i>Name of blog</i>	<i>Link to blog</i>	<i>Name of blogger</i>	<i>Either UVM or traffic</i>	<i>URL and follower count</i>	<i>1-5 (5 highest quality)</i>	<i>Y/N (link to examples)</i>	<i>Y/N</i>	<i>Y/N</i>	<i>URLs to sample blog posts</i>	<i>Y/N</i>			

If you use a tool like Klout or other social ranking tool, you can include that score. Other times, your scoring can be a little bit more “gut-based” as you read through an influencer’s work. Which brings up a very important part of this process: **read your potential influencer’s work!** Read their articles, see how they respond to comments, review their tweets, and really get a sense of what matters most to them. To gauge the level and extent of their influence you can also see who is responding to their work and following them; all good things to incorporate in your spreadsheet as well (these people could be potential influencers, too).

## Ways to identify potential influencers:

Amanda Maksymiw and others have suggested steps for building your potential list of influencers:

- Use your listening tools to identify people talking about certain topics based on keywords.  
Ask your customers or others in your industry (never underestimate the power of word of mouth).
- Search on social media platforms, especially LinkedIn.
- Network like crazy. Attend events in different areas – get out of your bubble. Talk to customers, partners and sales.
- Ask peers in your marketing, product development or sales teams.
- Ask other influencers. You'd be surprised as to how many of your top tier influencers work together and recommend each other.
- Get involved in the forums and discussion boards/groups discussing your content. Joining Twitter parties, webinars and even reading through the latest industry reports or blog posts can quickly make you aware of who the key players are in your space.



## How many influencers should I add to my pool?

The answer to this question will depend heavily on how you respond to the “manage” section above. If you have a robust team, consider casting a bit of a wider net. But to start, and for efficiency purposes, most people tend to lean toward 5-10 influencers as a reasonable and manageable starting point.

# 7 BEGIN OUTREACH

Once you've identified a potential pool of influencers and you've spent enough time reading through their work to want to take the next step toward outreach, take a quick moment of pause to consider the following:

- How will you reach out to this person?
- What can you offer that is valuable?
- What exactly are you looking for from this relationship?

This is where all that time spent reviewing their work will pay off; sending a generic, impersonal request to a top-tier influencer may end up sounding pretty insulting. And remember, this is a two-way relationship; gone are the days where companies could throw money or samples at bloggers and expect them to fawn over the brand. Influencers have the ability to be much more selective, and they expect to be respected for the talent (and audience) they bring to your projects.

## Making the first "connection"

There are a few ways you can start to make connections with your target influencers:

- Give them some social media love, either through a reply, retweet, or mention.
- Provide thoughtful comments on their blog posts.
- Connect with them on LinkedIn, introducing yourself and why you'd like to connect.
- Make old-school phone calls (yes, people still do those).
- Shoot over an e-mail.



Most online influencers have hundreds, if not thousands, of people vying for their attention. Your goal is to become more than just one in a crowd. You need to make them see you as an individual worthy of attention...so bring some personality into it. If it just sounds like generic flattery, you might get a quick thank you or response, but you won't make much of an impression. If you let your personality come through, you'll start to make a mark in their minds as an individual."

**Firepole  
Marketing**

The key for your outreach is not to seem like you're asking for a favor, but rather suggest a collaboration in some form that takes into account their skills first, with your needs secondary. More suggestions on potential ways to collaborate are in the next section, but first, it's worth reading first-hand what a group of prominent influencers\* have stated as a "must-have" for brands to consider when working with them.

### Here's what actual influencers have to say about working with them:

*"For those of us who write content for a living, using proper grammar and punctuation in emails is important to us when communicating with a professional brand. We receive a lot of poorly written communications from brands that are supposed to be very professional."* - Adam Belling

*"Brands should focus on and set compensation based on the quality of the work being done, not just traffic stats alone."* - TerriAnn van Gosliga

*"Visit my blog and social media before contacting me to make sure your product/service is the right fit for me."* - Lindsay Ingalls

*"Don't forget smaller bloggers! Our page views may not be the highest, but our readers are generally more loyal and more willing to trust our recommendations."* - Julianne Puckett

*"You know your brand, but I know my audience. The more flexibility there is in a campaign, the easier it is for me to create original content that features your product in a way that my readers will connect with and increase the chance that they will share it with their friends."* - Anjanette Alea Milham

\*Quotes compiled from 2014 survey conducted by TapInfluence, courtesy of Holly Hamann (co-founder and CMO)



If you want to go the e-mail route, Amanda Maksymiw has some **fantastic templates** you can customize to make your outreach more efficient. Here's one example below:

*Hello [Name],*

*We haven't connected before but I work for [Company X] and I have enjoyed your blogs about [Topic Y]. We'd love to collaborate with you about [Content Idea Z]. We think our audience would love to hear from you...*

## 8 NURTURE INFLUENCER RELATIONSHIPS

After you've started making connections with your targeted influencers, you may feel more comfortable asking to work together in different ways, such as:

- Requesting that they co-create content with you
- Requesting custom content created for your brand or even exclusively for your platforms
- Asking influencers to share your content on their platforms

*Note: If you can find ways to engage influencers in the co-creation bucket first, the “create and share” buckets will take care of themselves after your relationship has had time to develop.*

### A Note on Compensation

If you are compensating influencers, you shouldn't apply a “one size fits all” attitude when it comes to working with them. Remember that no two influencers are compensated equally. I've found that having the compensation conversation early on, and with much transparency, helps expedite the process of getting people on board to working with you. Consider an influencer's reach, content quality, style, ranking and brand fit, but don't hesitate to be honest either. If you have limited budgets but are looking to build something long-term, make that known. Chances are the people who are the most loyal to your company will want to work with you in some capacity, even if your funds are limited.

Once you've established what you can spend, then think about how you'll spend it. Some options:

- The number of actions they take in promoting your content (or their content that features you)
- The number of hits they provide to a certain website you've provided
- The number of quality leads provided
- The number of pieces of content (i.e., per blog post)
- Retainer (multiple posts across platforms for a specific period of time)



Remember, don't apply the same approach to your influencers. Each has very specific skills or focus areas, topics of interest, unique sets of followers, and even platforms in which they excel. Use your influencer tracker to keep a continuous record of the things that matter to them — and the ways they like to participate (e.g., writing, speaking, being interviewed) — in order for your outreach to avoid feeling generic.

## How far can your content go?

One thing to consider is the scalability of your content that you're creating together. Just as you practice with your content marketing strategy, your influencer program should have legs that extend beyond one point-in-time campaign. For example:

- Consider rounding up monthly guest blog posts into quarterly eBooks
- If you've had a series of influencers host webinars or podcasts, gather those into robust resource guides
- A collection of quotes or insights from your influencers can be consolidated into best practices articles, or roundtable posts.

Holly Hamann, co-founder of TapInfluence feels strongly that distribution should be one of the most important spokes in your influencer marketing program, stating: *"If you've invested time and money to build influencer marketing programs, create content and measure results, be sure to check that it's not all just living in one place. If so, you're not getting as much out of the content that you could. Make sure you can feed your website and social platforms. If content is isolated and stagnant on a platform, you're not seeing its full potential."*



## 10 potential "projects" for your influencers

Here are some potential projects you could engage your new influencers to work on with you:

1. Ask for a quote for an article.
2. Request to speak at a conference.
3. Ask to join or be a guest on a Twitter chat or webinar.
4. Provide a quote for an eBook.
5. Gather responses on a specific topic for a crowdsourced blog post.
6. Request permission to share or link to their content. (You don't have to request it, but it's polite and will certainly show that you're interested.)
7. Request information or data for a case study.
8. Ask to write a guest blog post, or feature in one.
9. Include them in an expert panel at an industry event.
10. Ask to be a guest on a podcast or Google Hangout.

## Assess and Optimize Your Programs

Although it will take time and effort on your part, eventually you will get to a place with your influencers that a true relationship will exist. Asking for content sharing will no longer feel like a favor because you've put in the effort to show that you truly respect and value their contributions beyond just their audience reach. Now is time to throw in some goodwill "relationship-building" efforts to further solidify your loyalty to one another. For example, you can invite your influencers to an exclusive event, ask for input on a new product or service before anyone else, crowdsource ideas with them as a "pilot" group or send them small tokens of appreciation (like a gift card for coffee) or hand-written thank-you notes.

These actions will make them feel as valued and unique as you already know they are (and it never hurts to remember their birthdays, too).

"A number of people on our social influencer list are now good friends of mine. How's that for social media magic?"

JOE PULIZZI  
FOUNDER  
CONTENT MARKETING INSTITUTE



"Successful influencer communications require you to set clear expectations and timelines along with the benefits for all who participate in co-created content. Providing influencers with tools such as sharing images, pre-written tweets, embed codes and short URLs can substantially increase promotion participation and reach."

**Lee Odden**

Author, *Optimize*



2) **Discovery and connection tools:** If you don't have the time or power to find the right people to work with, there are a variety of tools that can help you scour the internet for just the right people. These tools can range from basic listening, to influencer scoring (like Klout), to finding people who write about certain topics on forums or by keywords.

3) **Distribution tools:** If you've got the content creation down pat, have a great group of influencers but just need a little "boost," consider using tools to help in the distribution or even just amplification of the content you're creating with your influencers.

It's likely you'll need some form of tool/vendor from all of the above buckets throughout your influencer marketing journey, especially since the objectives of your programs can shift from awareness, to lead generation, and back to sentiment at the drop of a hat depending on your marketing objectives or a specific campaign. Keeping an ongoing list of the available tools will help you better remember what you've reviewed and speed along your selection process when the time comes.



## Some tools to consider:

### CONTENT CAMPAIGN VENDORS

TapInfluence • BzzAgent • Markerly • Social Media Link  
Influitive • SocialChorus • Ivy Worldwide

### DISCOVERY AND CONNECTION TOOLS

Visible Technologies • CMP.L • Commun.it  
Traackr • Little Bird • GroupHigh • Insightpool

### DISTRIBUTION TOOLS

InPowered • GaggleAMP • HubSpot • Buddy Media

While we have some tools and vendors that we know have achieved great success working with many of our partners, we also know that's just the start or the vast universe of available options. That's why we created a List.ly that our community (including you) can contribute to. Join our [list here](#), and add your own recommendations.



Here's an idea of how to set up your KPIs depending on the objectives you established at the onset of your program:

OBJECTIVE	POSSIBLE METRICS
Brand awareness	Website traffic • Page views • Video views • Document views • Downloads • Social chatter • Referral links
Engagement	Blog comments • Likes, shares, tweets, +1s, pins • Forwards • Inbound links
Lead generation	Form completions and downloads • Email subscriptions • Blog subscriptions • Conversion rate
Sales	Online sales • Offline sales • Manual reporting and anecdotes
Customer retention/loyalty	Percentage of content consumed by existing customers • Retention/renewal rates
Upsell / cross-sell	Sales for new products / services

Regardless of what you choose to measure, be on the look out for some areas for potential improvement, especially in the beginning. No program is perfect, and the ability to grow a truly robust influencer marketing program takes a lot of time and effort. By showing more than just your superficial successes, you'll demonstrate the thoughtfulness you're putting behind growing these working relationships into something meaningful for your company. It's not always pretty, and like any relationship can mean some "give and take" for everyone involved, but at the end, these strong voices projecting your company messages for you, without solicitation, will have an ROI that far exceeds many of the other programs in your marketing mix.

## About Content Marketing Institute:

**Content Marketing Institute (CMI)** is the leading global content marketing education and training organization. CMI teaches enterprise brands how to attract and retain customers through compelling, multi-channel storytelling. CMI's **Content Marketing World**, the largest content marketing-focused event, is held every September. CMI also produces the quarterly magazine **Chief Content Officer**, and provides strategic consulting and content marketing research for some of the best-known brands in the world. CMI is a 2012 and 2013 Inc. 500 company.

If you want to learn more about influencer marketing, join us at **Content Marketing World** from September 8 - 11 in Cleveland, Ohio. Sam Fiorella is hosting a workshop on creating and executing a social influencer program (extra fee required) and Lee Odden will be presenting, "Content + Influencer Marketing = A Powerful Way to Grow Your Business."

Use code **INFLUENCER when registering** to save \$100 off main event and all-access passes.

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