



**The Essentials of a
Documented Content Marketing Strategy:**

36 QUESTIONS TO ANSWER



WHY DOES A DOCUMENTED CONTENT MARKETING STRATEGY MATTER?

The majority of content marketers don't have a documented content marketing strategy.

What difference does a documented content strategy make? According to Content Marketing Institute/MarketingProfs **content marketing research**, marketers with a documented content strategy are:

- ▶ Far more likely to consider themselves effective at content marketing
- ▶ Far less challenged with every aspect of content marketing
- ▶ Generally more likely to consider themselves more effective with every tactic and social media channel
- ▶ Able to justify a higher percentage of the marketing budget to be spent on content marketing

So, what does a documented content marketing strategy include?

There is no “template” for a content marketing strategy, because how much and in what format you need to document your strategy is unique to your business. For small and limited content marketing initiatives, we've seen success from simply walking through the process and not documenting much at all (although our research shows that a larger percentage of smaller organizations have a documented content marketing strategy as compared to their larger peers). In other larger organizations or initiatives, documenting everything and adding mapping or even separate executive summaries can make sense.

As a starting place, *The CMI Content Marketing Framework: 7 Building Blocks to Success*, walks you through the seven common elements of a successful content marketing strategy.

Regardless of the format you use, this document will walk you through the steps you need to follow and the questions you need to ask as you create your content marketing strategy.



CHECKLIST: POSSIBLE QUESTIONS TO ANSWER IN YOUR DOCUMENTED CONTENT MARKETING STRATEGY

Business Plan for Innovation

- What challenges are we trying to solve?
- What is our dream outcome with this process?
- What is the risk if we fail?
- Whose unique perspectives do we want to involve? If internal, what permissions do we need from their managers to participate?
- What is our budget?
- How often do we want to produce deliverables?
- If life or business issues get in the way, how can we push a “big red button” without disbanding the idea of the business plan?
- How will we execute each experimental idea, and how long will we give it to work?

Business Case for Content Marketing

- What is the need? What do we hope to accomplish with our content marketing?
- How big of a need is it? Do we have a big enough audience to justify a plan?
- What is the business model? How does it work? What do we have to do?
- What is our differentiating value? Why is this more important than other things we are spending time on?
- What are the risks? What’s in our way of success – or what happens if we fail?

Persona Development and Content Mapping

- What are the details of each of our personas?
- What does our sales funnel look like?
- What does the customer’s buying cycle look like?
- What content do we need to create based on the engagement cycle?
- What is the customer context?



Our Brand Story

- What does our marketing look like? Where are our competitors situated? What is the reality for our customers? Why do they currently identify with our brand?
- What would the world look like if we could realize the Big Hairy Audacious Goal (BHAG) that we set out for our brand? What is the “call to adventure” for our product?
- Why hasn’t this been done?
- Who will provide guidance for our brand as it makes this journey?
- What is our new idea? How will we lead our audience into this unknown with us?
- Who will our brand align with to help us move forward? Who will be the naysayers? What challenges can we plan for?
- What will our brand ultimately achieve?
- Once our brand has changed, how will we show that differentiation?
- What ambush could – or will – our brand face now that it is different? How will we continue to move on?

Channel Plan

- What do we already have that helps us tell this story (e.g., an existing Web page, blog, etc.)?
- What must change for us to tell this story (e.g., do we need to add a blog; do we need to create or revisit our social Web strategy?)
- What must stop (if anything) for us to tell this story (e.g., do we need to stop using Facebook and divert our energy to a blog?)
- What are the objectives for each channel as they relate to the engagement cycle?
- How will we map each channel to our story?
- What are our specific goals for each channel?
- Which channels apply to which persona(s)? (Note: You may want multiple accounts on the same social network to address different personas.)
- How/who will manage the content and conversation on each channel?
- What is the velocity, tone, desired action and structure for the content on each channel?



BUSINESS PLAN FOR INNOVATION

When introducing an innovative process like content marketing, you may need to build the business case for innovation. Why? Because it's quite simply getting the permission to fail. There is no way to prove return on investment (ROI) before you innovate because, by definition, it hasn't been proven before.

This plan may seem a bit counterintuitive, but building a structured process for innovation is more than gathering a new group in a conference room and throwing sticky notes on a wall (although that's fun). Consider building a structure and plan for your innovation.

► Here are the questions the plan should include:

- What challenges are you trying to solve?
- What is your dream outcome with this process?
- What is the risk if you fail?
- Whose unique perspectives do you want to involve? If internal, what permissions do you need from their managers to participate?
- What is your budget?
- How often do you want to produce deliverables?
- If life or business issues get in the way, how can you push a “big red button” without disbanding the idea of the business plan?
- How will you execute each experimental idea, and how long will you give it to work?



BUSINESS CASE FOR CONTENT MARKETING

Once your organization has agreed to experiment, the next step is building the business plan for content marketing. Content marketing is so new for most organizations – and tends to involve so many different parts of the business – that it’s often difficult to identify the “hard benefits” or “numbers” that are going to really drive business value.

It’s important to note: The business case is not ROI. Trying to pin ROI on content marketing is a bit like asking, “What’s the ROI on your telephone system?”

Like any good business plan, the business case for content marketing answers five questions succinctly:

▶ **What is the need? What do you hope to accomplish with your content marketing?**
Goals include things such as brand awareness or reinforcement, lead conversion and nurturing, and customer conversion.

▶ **How big of a need is it? Do you have a big enough audience to justify a plan?**

- Can you use content marketing to ease an existing pain point or to enhance your existing marketing successfully?
- Is this opportunity big enough to warrant spending your time and/or your money on? If so, by how much?

While those with a documented content strategy are less challenged with every aspect of content marketing, those without a content strategy are far more challenged with getting executive buy-in, which is a key roadblock to content marketing success. Creating a business case is key to getting buy-in.



▶ **What is the business model? How does it work? What do we have to do?**

- What is the scope of your initial content marketing plan?
- What is the team you will need to address that scope?
- How will this affect your existing content marketing efforts?

▶ **What is your differentiating value? Why is this more important than other things you are spending time on?**

- Can you expect a lift in an existing program?
- Is there something that you are no longer doing (or that you should no longer be doing) that you can shift people/budget from?
- Are there programs that content marketing can help feed (e.g., your SEO-optimized site)?
- What is your budget for failure?

▶ **What are the risks? What's in your way of success – or what happens if you fail?**

- What are the possible sources and impacts of the content marketing risk on achieving the goals you have set?
- What can you control? And what can you do to minimize the possibility of these things occurring?
- Will your risk mitigation plans increase the costs and/or return of your plan?



PERSONA DEVELOPMENT AND CONTENT MAPPING

Do you really know WHO your customers are? The first thing you need to understand is that personas are NOT demographics. Demographics are simply attributes of a population (e.g., age, gender, race).

You need to start thinking about your buyers as people – alive and different and separated by their behaviors — rather than identifying them by their demographics. Of course, these people will represent “segments” (or groups) of your consumers — but they are nonetheless individuals you can identify and service.

Follow these steps so you can better understand who your audience members are and what questions they have.

Develop your personas

While we believe that you can – and perhaps should – go through a comprehensive buyer persona and content-mapping exercise, many times this is not feasible. However, figuring out WHO you are talking to is vitally important — as is walking through a buyer persona exercise.

You will need one persona for every distinct group to which you are marketing. In other words, if a person goes through a different buying cycle, he or she is a different persona.

▶ **What do you need to know about these people? The easiest way to think about this is to answer the following questions:**

- Who is this person?
- What is his or her need? (This is NOT why they need your product.)
- Why should she care about you?
- What unique value proposition (UVP) do you offer this persona?



Create the engagement cycle

The engagement cycle is a defined process your audience members go through as you help them increasingly engage with your brand. You use it to map content to both sales and a consumer engagement process to help deliver the right conversation at the right time.

▶ **Just as in real life when you meet someone, determining what you want to say to a persona is a combination of two things:**

- Content: What do you want to say?
- Context: What is the best time and place to start the conversation?

The sales process

To start, you need to define your sales process, which is how you watch your consumer proceed through your marketing and sales efforts. Regardless of what you call each step, this is how you identify customers who:

- Know nothing about you
- Know something about you (lead)
- Are interested in what you have to offer (subscriber)
- Compare you to other solutions (prospect)
- Do what you want them to do (buyer)

Once you have your funnel mapped out, you then build out your content segmentation, which is a matrix of your personas and your sales funnel. Once you have your grid, start filling in the cells with your existing or new content items. A primary benefit of this exercise is that it often points to where your content marketing is either very light or very heavy.

Content Segmentation Grid

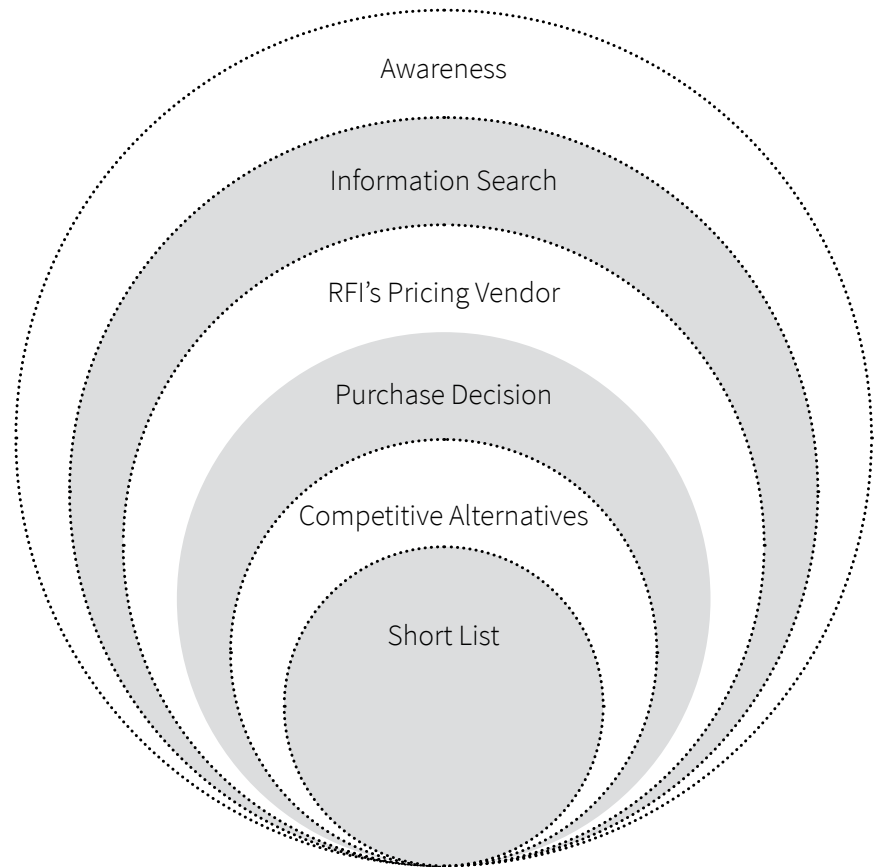
	SALES	CONTACT	LEADS	QUALIFIED	FINALIST	VERBAL
PERSONAS	Jeremy, IT Director	White Paper 1 White Paper 2	Our Blog	ROI Calculator	Webinar	Case Study 1 Case Study 2 Case Study 3
	Cheryl, CFO	White Paper 3		Interview w/ CEO	ROI Calculator	



Buying Process

The buying process

Next, you need to map out how your customers buy from you, or, once they have bought, what you want them to do next. A sample buying cycle may look something like the illustration. Note that this is not a linear process and consumers typically jump in and out of the orbits as they move closer in. But, as the consumer moves closer to the center of gravity, what he or she wants becomes more focused as well.



Regardless of where your content is in the buying process or what persona you are targeting, it needs to do one thing: Support your content marketing mission statement. The why must come before the what. This seems obvious, but most marketers have no mission statement or core strategy behind the content they develop.



Content Segmentation With Buying Cycle Highlighted

	SALES	CONTACT	LEADS		QUALIFIED		FINALIST	VERBAL
	BUYING CYCLE	Awareness & Education	Information Search Vendor	RFI Vendor Information	Make the Purchase Decision	Alternative Searches	Short List of Vendors	Contract
PERSONAS	Jeremy, IT Director	White Paper 1 White Paper 2	Our Blog		ROI Calculator	Webinar	Case Study 1 Case Study 2 Case Study 3	
	Cheryl, CFO	White Paper 3		Interview w/ CEO		ROI Calculator		

The engagement cycle

Once your sales and buying processes are defined, you next overlay them to get a better view of the content that you have – and that which you need. This piece is designed to help you deliver the most relevant content to the most relevant persona at the most relevant time.

Note: You do not need to map content to this extent, and you certainly don't need to develop content segmentation grids for every product or process. However, for key segments, you may want to consider these questions:

- In what language should we produce this content?
- In what device context will this content be consumed (device, interface channel)?
- Why will people want this content through this channel?
- What do we hope they will do with this content?



YOUR BRAND STORY

Your next step is to determine your pillars of content, which in essence, are the stories you want to tell. While this sounds great in theory, the tricky part for many companies is determining how to develop these stories in the first place.

There are no hard-and-fast rules for developing your brand's stories, but you can go back and look at classic storytelling and structure as a helpful map to guide you. In *Managing Content Marketing*, we adapted Christopher Volger's hero's journey into 10 steps for developing your content marketing brand journey.

Please note that this is a framework rather than a "to do" list or template. The structure is meant to help you to develop a way to TELL the story or maybe to discover what is missing from the existing story. It's not a TEMPLATE for the story. This is an important distinction because your story will be unique to you, your brand, and the experience you are trying to create.

The conventional market

What does your marketing look like? Where are the competitors situated? What is the reality for your customers? Why do they currently identify with your brand?

The challenge

What would the world look like if you could realize your Big Hairy Audacious Goal (BHAG) that you set out for your brand? What is the call to adventure for your product?

The rejection of the challenge

Why hasn't this been done?

The appointment of the sage

Who will provide guidance for your brand as it makes this journey?

Crossing the unfamiliar

What is your new idea? How will you lead your audience into this unknown with you?



Map the road of challenges

With whom will your brand align to help you move forward? Who will be the naysayers? What challenges can you plan for?

The final challenge

What will your brand ultimately achieve?

Looking back

Once your brand has changed, how will you show that differentiation?

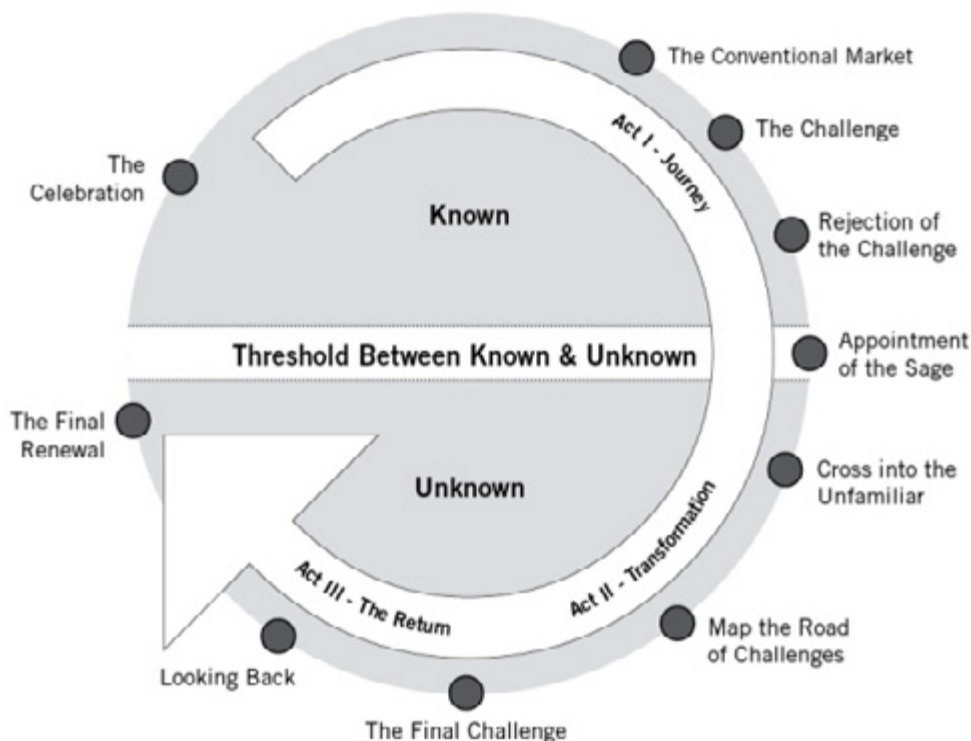
The final renewal

What ambush could – or will – your brand face now that it is different? How will you continue to move on?

Celebration

This is you realizing your dream.

Content Marketing Brand Hero's Journey



*Learn more about
Brand Storytelling:
10 Steps to Start Your
Content Marketing
Hero's Journey.*

CONTENT MARKETING CHANNEL PLAN

Thus far, you have identified your personas, developed your pillars of content, and segmented your content into both your personas' buying cycles and your internal sales cycles. Now it's time to choose how you are going to "place" that content. What channels are you going to use to distribute your content?

To answer this question, you have to consider the CONTEXT in which your audience will view the content and then use that to alter the content accordingly.

There are seven basic considerations for developing a content marketing channel plan.

Situational analysis

- What do we already have that helps us tell this story (e.g., an existing Web page, blog, etc.)?
- What must change for us to tell this story (e.g., do we need to add a blog; do we need to create or revisit our social Web strategy?)
- What must stop (if anything) for us to tell this story (e.g., do we need to stop using Facebook and divert our energy to a blog?)

Channel objectives

- What are the objectives for each channel as they relate to the engagement cycle?

Content plan

- How will you map each channel to your story?

Metrics

- What are your specific goals for each channel?

Personas addressed

- Which channels apply to which persona(s)? (Note: You may want multiple accounts on the same social network to address different personas.)



Content management process

- How/who will manage the content and conversation on each channel?

Editorial plan

- What is the velocity, tone, desired action and structure for the content on each channel?

A Very Simple Channel Plan

CHANNEL	NAME	STRUCTURE	TONE	DESIRED ACTION
	Main Corporate Site	News Section - 250-Word Blurbs announcing new items	Professional	Click to blog (all phases)
	Product Micro Site (New Blog)	Blog with 500-750 word posts	Casual/ conversational	Subscribe Phase 1 - Add "White paper download Phase 2"
Blog	Main Corporate Blog	Cross Linking - Making sure existing posts are linking into new Micro site	N/A	Link to blog posts
	Sales Twitter Channel @Sales	Conversational	Friendly - Focused on being our "broadcast" platform and online conversation. Add to existing Twitter content.	Click through to blog posts. RT's of our infor- mation.
	CRM Twitter Channel @CRM	N/A	N/A	N/A
	LinkedIn	New LinkedIn Group	Asking questions to generate conversation	Follow and join group on LinkedIn - Click through to blog

To see a simple channel plan and more details about each step, view [creating your content marketing channel plan](#).



CONCLUSION

Your documented content marketing strategy is not something to develop and put aside, but rather it is a “living” document that should be referred to and adapted as your consumers’ needs and the market changes. As mentioned in the introduction, what you need to document and the format you use will depend on the needs of your business. But, by working through these questions, you will certainly get a better sense of the content you need to create (and what you don’t need) so you can better prioritize — and create epic content.

And, of course, your job does not end there. Once you have your strategy, you need to execute. Consider the next two steps:

The global editorial calendar

The global editorial calendar is an aggregation of your channel plan and actually looks at content production as well as the editorial schedule. It can take many forms, although its final realization will be tied closely to your process.

The resource plan (occasionally)

This is a common document when your content marketing strategy is performed as a brand new initiative. After you’ve defined your strategy, completed your persona development, identified your story, and mapped your channels, you’ll find there are a large number of tasks to be completed. You’ll need to assign resources for these tasks – and in many cases, it may affect your timeline or budget.

To get more details of these plans, read the definitive guide, [Managing Content Marketing](#).

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** event, the largest content marketing-focused event, is held every September, and Content Marketing Sydney, every March. 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, 2013, and 2014 Inc. 500 company.

