Build Your Content Marketing Plan: A 10-Step Guide
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Today, companies of all sizes create and market content for many reasons: to generate and nurture leads, engage and educate audiences, build trust and credibility, advance their industry, and to attract and retain customers — a phenomenon that contributes to the estimated 4.75 billion pieces of content shared online daily as of 2013. That number is up 94 percent from the year before and studies predict it will only keep rising, with content marketing becoming all the more essential. In fact, the majority of today’s B2B marketers (86 percent) and B2C marketers (77 percent) use content marketing, according to the latest reports from Content Marketing Institute (CMI) and MarketingProfs.

Yet not everyone is having success. The same reports tell us that only slightly more than a third of all marketers find content marketing effective. Interestingly, a strikingly similar percentage — only 35 percent of B2B and 27 percent of B2C marketers — actually have a documented content marketing strategy.

What does this mean?

A documented plan is critical to the effectiveness of your content marketing programs.

Most marketers or business executives haven’t been through a content marketing planning process before, so the idea of getting started can be daunting. While every plan is different, there are some common elements that should be part of any plan. This book will walk you through them.
We’ve broken the planning process down into 10 steps in an effort to get you off on the right foot:

- **Step 1**: Set Goals & Objectives
- **Step 2**: Plan Your Budget
- **Step 3**: Research the Market
- **Step 4**: Know Your Target Audiences & Influencers
- **Step 5**: Assess Existing Content
- **Step 6**: Benchmark the Competition
- **Step 7**: Fine-Tune Your Ideas, Messages, & Themes
- **Step 8**: Identify Your Channels & Tactics
- **Step 9**: Settle on Your Process, Team, & Tools
- **Step 10**: Establish Measurement & Reporting Guidelines

In the following sections, you’ll find tips to get started with each step of the process, from the initial brainstorming and laying of groundwork to configuring your goals and budget, knowing your audiences, deciding what technologies and analytical tools to use, and seeing how it all fits together to take your company in the direction you want to go.

While we present the planning process in a series of steps, don’t let that mislead you into thinking this is simple. Each step involves several components, all of which interrelate.

### Content Marketing Without a Plan: Beware

Feel the need to get going? Maybe bypass the plan and just start publishing? Or are you afraid to take the planning plunge? Resist the urge to dive in and execute before you plan.

Here’s what will likely happen if you forge ahead minus the plan:

- Your editorial calendar will fall apart within 30 days.
- You won’t find the “big idea.”
- Your subject matter experts and internal writers will lose interest.
- Your internal stakeholders (or investors) will stop buying in.
- You’ll lose the opportunity to educate your team on content marketing’s myriad benefits.

⇒ Get all the details on how and why content marketing without a plan goes awry here.
Content marketing goals should come from marketing goals. Marketing goals should come from business goals. Content marketing, therefore, should support the business, not just marketing. Aligning content marketing with your marketing and business objectives should guide your approach, but don’t go overboard, especially if this is your first content marketing plan. Set some simple but specific one-year goals, and then identify some broader two-or-three-year goals, which you’ll need to revisit on at least a quarterly basis.

To establish your content marketing goals, start with some questions. They might look simple, but don’t assume you know the answers and skip this part. Discuss them with your team and make sure you’re all on the same page.

1. Why are we doing this?  » Even if you think you know the answer, spell out why you’re doing content marketing and why it’s important. And the answer shouldn’t be, “Because everyone else is doing it.” Forget about what your competitors or the rest of the world are doing, and come up with a specific reason tied exclusively to you.

2. What’s the overarching goal?  » There are a variety of ways to answer this question. Some answers will focus on hard metrics like brand awareness, lead generation, or actual transactions. Other answers will focus on softer metrics like prospect engagement or establishing your company as a thought leader in your industry. There is no right or wrong answer. No matter what, though, answer this question early in the process.

3. What is our unique story?  » Even if you think your business falls into the cookie-cutter category, it has a unique story. If you don’t know what that story is, then you may want to go through a process that focuses on company messaging before you move forward.

Content marketing should support the business, not just marketing.

If you do know what that unique story is, you’ll need it to inform ideas, messages, and themes (see Step 6), and to weave into each piece of content.
The 7 Flavors of Content Marketing: What’s Yours?

As you develop your content marketing goals, it’s important to understand what type of content marketer you are. Make sure you establish this before you move forward and document your plan.

Here are the seven flavors of content marketers, ranked in order of those most likely to succeed. Can you pick out your flavor? Or are you a hybrid of several?

1. Brand Builder  » If your flavor is brand builder, kudos. Capture readers with entertaining, educational pieces of content that incorporate brand messaging, and they will perceive your brand as trustworthy, credible, and likeable.

2. Thought Leader  » The thought leader knows that there is little that can match content marketing’s effectiveness in terms of making owners, principals, or executives appear as the people who set the agenda for the industry.

3. Lead Nurturer  » You have more leads than you know what to do with — and not enough competent sales people to stay on top of them. Get your CRM lead data cleaned up, fire up your marketing automation tool, and start dropping smart content in your prospects’ laps.

4. Social Media Manager  » You’re the hit-or-miss flavor. Social media activity should be only one part of a strong content marketing plan — don’t let the social media tail wag the content marketing dog.

5. Lead Generator  » While content marketing will generate short-term leads, those leads are not necessarily “sales-ready.” Make content marketing the supporting cast to your existing or new programs.

6. Publicity Seeker  » Otherwise known as the “Replace PR with Content Marketing, Expect Same Benefits” approach, this flavor is almost always a poor choice. Content marketing contributes to, but does not create, media coverage.

7. Sales Guy/Gal  » While content marketing should certainly impact revenue in the long term, rare is the program that drops a customer in your lap during the first 3-6 months.
Now that you’ve done the groundwork and defined goals for your content marketing effort, you need to try to put a price tag on it. Content marketing efforts come in all sizes. If the sky is the limit where budget is concerned, you can really have a lot of fun, but that is rarely the case.

So how much do you budget for content marketing and how do you get it done accurately?

You could plan out the spending for all the other efforts you think you “need” during the year — like a new website, a corporate video, marketing automation software, PR — and then use whatever is left for content marketing; or use a percentage of your overall marketing budget. There are lots of ways to figure it out.

We aren’t here to tell you exactly how to prepare the budget for your organization, nor are we here to actually tell you how much to spend on content marketing. Answers to those questions depend on dozens of business and marketing variables.

But we can offer five strategies and some quick tips to make sure you don’t underestimate the cost of content marketing success.

1. Don’t budget for content creation only
   - The actual creation of content is merely one step in the process. An important one, yes, but if you plan to do content marketing right, you also need to budget for the following: content marketing strategy and planning, content optimization, content distribution, and content reporting and analysis.

   **Budgeting Tip**
   If you do start with a budget for content creation only, double it to get a rough total content marketing budget estimate. While creating the content is certainly the most time-consuming component over the long haul, you should be spending equal time across other areas.
**2. You're going to need an editor ... for everything**

**Budgeting Tip**

While your inclination may be for your managing editor to reside on your payroll, don’t be afraid to try outsiders. There are plenty of great freelance editors out there. Just make sure you know the difference between a copyeditor, or proofreader, and an editor.

You need to budget for an editor — at least one. You may be able to make the case for an internal editor, or you may decide that it makes more sense for someone on the outside to serve in that role. But someone, preferably one person, needs to be in charge of making sure that every single piece of content that is produced inside your marketing organization has a shot at being remarkable.

**Budgeting Tip**

Don’t dismiss the writer with the higher rate without giving some thought to why she carries that rate. Will she be easy for your editor to work with, cutting down editing time? Is she able to handle interviews with subject matter experts on her own, making the whole process more efficient?

**3. High-quality content does not come cheap**

**Budgeting Tip**

Don’t dismiss the writer with the higher rate without giving some thought to why she carries that rate. Will she be easy for your editor to work with, cutting down editing time? Is she able to handle interviews with subject matter experts on her own, making the whole process more efficient?

Creating great content, the type you will need to break through the clutter, can be expensive. It requires planning and the kind of writing that will tell an engaging story — your story — to bring your readers back again and again. Choose your writers well. Then realize that design, photography, and editing are also an integral part of the remarkable-content process.

**Budgeting Tip**

Be clear and specific about the scope, expectations, and deadlines on any design project. If you are using an outside designer, have him or her create estimates based on a per-project fee rather than billing by the hour. Some designers might request that the project includes a “not to exceed” number of hours within that fee as protection. Make sure that you are notified when your designer reaches 75 or 80 percent of those hours so you can plan for any potential problems.

**4. Poor design will diminish even remarkable content**

**Budgeting Tip**

Be clear and specific about the scope, expectations, and deadlines on any design project. If you are using an outside designer, have him or her create estimates based on a per-project fee rather than billing by the hour. Some designers might request that the project includes a “not to exceed” number of hours within that fee as protection. Make sure that you are notified when your designer reaches 75 or 80 percent of those hours so you can plan for any potential problems.

You might be asking, “What the heck does design have to do with content?” The answer? Everything. **Design impacts content.** Content impacts design. Remarkable content is far more difficult to achieve without great design, because innovative design will enhance what you have to say. Find a way to get a content strategist and a designer to work in harmony, and you’re far more likely to create some phenomenal pieces.
5. Borrow a little budget from other marketing tactics


Your marketing plan should be content driven overall, and should not include content marketing only as a line item.

Budgeting Tip

When you’re trying to establish your content marketing budget, get your marketing colleagues together and ask the following question, “How effective would your tactic or area be without content?” The discussion should allow you to plant the seed that the budget for content marketing needs to be shared across all areas, because without quality content and a plan to market it, no one’s marketing efforts will succeed.

Content-Driven Marketing

Content marketing is not a tactic, but rather a marketing approach. That’s why we call it content-driven marketing, because it should be integrated into all marketing tactics.
Your content marketing plan should be based on some credible research of both the primary and secondary variety. Primary research should include interviews with marketing stakeholders, both internal (employees) and external (customers, prospects). Secondary research should include any relevant reports, studies, or surveys. If you look hard enough, there are even studies summarizing content marketing usage in particular verticals.

Your research can take many forms. Some might be traditional market research, or an exploration of consumer attitudes towards a particular product. Some might be usability research, or a test of how a user navigates through a particular website. Some might be keyword research, used broadly to gauge demand or narrowly to forecast search engine marketing traffic and spending.

At a bare minimum, your content marketing plan needs to include your research findings in these core areas:

- Current content inventory and performance, including what generates the most traffic, sharing, and leads.
- SEO rankings and associated organic traffic, sorted by types of content and content topics.
- Social media and other distribution channel engagement.
- Your top competitors, the content they create, and how that content is performing.
- Thought leaders in your field.
- Your target audiences (more on this in the next section), and where they are most likely to access and engage with content.
- Keyword research to identify terms consumers use to find your type of business, product, or service.

Don’t do research just to say you did research, though. Use it to guide your plan and make key decisions, such as putting more resources into one social channel over another or partnering with a particular company to reach a target audience. In other words, tie the research you conduct to a specific action.
Developing a content marketing plan without identifying the target audiences is like shooting an arrow in the dark. If you don’t know who you are trying to reach, then regardless of how remarkable your content is, it will have little chance for success.

In identifying the target audience, don’t jump immediately to your current customers. They may or may not be the right customers for your business, and they may or may not be the customers you aspire to work with. And don’t assume you have just one audience.

During this part of the process, ask questions like:

» Who are our best customers?

» What types of issues are they concerned with?

» What types of information do they consume to address those issues?

» Where do they get that information now?

» How do they typically interact with information and the companies that produce that information?

» Who else do we want to reach? Prospective clients, prospective employees, investors, partners?

Also take time to figure out who your influencers are, that is, the people who like you — because they can convince others to like you, too. Often, your influencers are your best clients or customers. They sing your praises to others on social media, they engage with content you publish, and they can articulate in authentic, influential ways what, exactly, makes you so great.
If you’re going to plan your future content, it probably makes sense to evaluate your current content, right? In particular, if you’ve already developed a healthy library of content, you’ll want a trained editorial eye evaluating each piece to determine its value (or lack thereof) as engaging, educational content for your target audience(s), its relationship to new messages and themes, and whether it deserves a spot on the new content roster. Other things to think about as you conduct your review are whether content feels too sales focused, whether it offers a clear takeaway for the reader, and whether the design works well with the message.

Make sure you dig out all of your content — remember, it’s everywhere. To be truly thorough you should review:

» Website(s) and microsite content

» Blog

» Any anchor content and other downloadables including case studies, whitepapers, checklists

» Social media properties

» All printed sales collateral material

» All non-sales collateral (invoices, notices, etc.)

» Videos

» PowerPoint or SlideShare presentations

Only the truly remarkable content will break through the clutter. Good is no longer enough. You will need to be great.

Also take a look at performance. Review open and click rates. What content performed well? What content didn’t? Keep an eye out for patterns, and evaluate what you can do to make your content stand out from the 2 million blog posts written every day. Only the truly remarkable content will break through the clutter. Good is no longer enough. You will need to be great. Save your remarkable content, archive the rest.
Your competition is vying for your buyers’ and influencers’ mindshare on a daily basis. Anyone in the decision-making seat — your prospects included — has limited time to consume information and will select only the most remarkable content.

Chart out what your competitors are doing and then adjust accordingly in your planning. Are they on Facebook, Twitter, LinkedIn, Google+, Pinterest — how do they use those platforms? Are they effective? How many followers do they have? How often do they post? Does their content engage audiences or appear to fall on deaf ears? Do they have white papers, eBooks, email campaigns, newsletters, videos? Do they have a blog and host webinars? Visit each competitor’s website, go to their social platforms, sign up for their newsletter. Plot your findings and identify gaps.

Make an analysis of:

» Who is doing content marketing well and who isn’t?
» What’s not being done in your field?
» Are there several tactics that none of your competitors are using that present a real window of opportunity?

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<tr>
<th>Company</th>
<th>Blog</th>
<th>Video</th>
<th>White Papers/eBooks</th>
<th>Email Newsletters</th>
<th>Webinars</th>
<th>Case Studies</th>
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As you go through your competitor list, don’t forget about your aspirational peers. Your industry may be behind the times, and your competition may be doing things the wrong way. Make sure you include a company that you know is executing content marketing successfully, and benchmark against it.
Most marketers spend the bulk of their time in this area — this is the fun stuff, the “let me dream up all the cool content ideas I have and see if anyone likes them” work. But if you don’t put some structure around it, your plan will look like one giant brainstorm.

Make sure you address these three distinct areas:

1. **Ideas** » You might also call these campaigns, or programs. Your ideas take into account goals, objectives, messages, but put a creative spin on things. Think of Lowe’s series of six-second Vine videos that walk consumers through home improvement tips like using lemons to remove water stains or vegetable oil to keep squirrels at bay. Also consider American Express creating its OPEN Forum content initiative, where business people can exchange ideas and share advice. These are ideas (or campaigns) developed around client or customer needs and tied to the company’s goals and objectives.

2. **Messages** » Don’t do a content marketing plan without going through a messaging development exercise. Messages inform themes, themes inform content. Make sure everyone is singing from the same hymnal on who the company is, what you do, and how clients benefit from using you.

Create a **messaging guide** that steers development of all other content.

Think of the guide as a “Who are you?” kind of document. It includes your company’s:

- Value proposition and benefits
- Elevator pitch (or 30-second explanation of what you do)
- Boilerplate (a short, more formal two-to-three-sentence description of what you do)
- Buyer personas (profiles of your customers or clients, including their values and the problems or challenges they face)
- Competitive positioning (the key factors that differentiate you from your competitors)
3. Themes  »  When you get to the theme level, now you’re talking about taking your company’s core story (i.e., your messaging), combining it with the target audiences, and developing the specific stories you need to tell to engage with the right people. For a tax law firm, the themes might be tax law trends affecting small- and medium-sized businesses, news or industry information, and best practices for your business. For a non-profit focused on healthcare reform, they might be collaboration among healthcare providers, investing in technology, and preventive health.

Remember that your themes should always circle back to your “campaign” and should reinforce your messaging as much as possible. This is not to say that every piece of content needs to attempt to include every message, but remember, the job of your content marketing effort is to reinforce your overall marketing and business objectives.

Don’t do a content marketing plan without going through a messaging development exercise. Messages inform themes, themes inform content.

How To Create All That Content

So you nail those ideas, messages, and themes and your team of content creators is ready to write. Where are you going to get all those content ideas? A key to your content success is a well-stocked editorial calendar. Make sure you create one and are religious about keeping it up to date. Don’t be afraid to let your calendar flex — news comes up and you should be willing to shift and revisit what you have planned.

But if the editorial well starts to run dry, try these 9 ideas to fill it up again:

1. Repurpose something you’ve done before
2. Create crowd-sourced content
3. Hold a brainstorming meeting
4. Make a prediction
5. Talk to your sales people
6. Check out what your competition is doing
7. Recap an event
8. Interview an expert
9. Be newsy

Here’s all the detail on how to make these tips work.
step 8  » Identify Your Channels and Tactics

Successful content marketers include an arsenal of tactics in their plans in order to achieve their goals. **What are the most-used tactics of modern content marketers?**

### B2B Content Marketing Tactic Usage

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<thead>
<tr>
<th>Tactic</th>
<th>Percentage of Use</th>
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<td>Social Media Content</td>
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<td>eNewsletters</td>
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<td>Articles on Your Website</td>
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<td>Blogs</td>
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<td>Online Presentations</td>
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**Source:** CMI’s B2B Content Marketing: 2015 Benchmarks, Budgets and Trends — North America

### B2C Content Marketing Tactic Usage

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</tbody>
</table>

**Source:** CMI’s B2C Content Marketing: 2015 Benchmarks, Budgets and Trends — North America

**Don't reinvent — repurpose**  » The point is to use multiple tactics (B2B marketers use an average of 13, B2C use 11) in integrated form. For instance, you can repurpose content from your blog in your newsletter, or content from your case study in your infographic. You can pull countless potential blog topics from your white paper, and feature quotes from your webinar on your social channels. You don’t have to reinvent the wheel each time, but multiple content types will address buyers at various stages of the marketing funnel.
There’s no point in creating content if no one knows it exists. A solid channel strategy answers the question, “Where will my content live in order to receive maximum exposure to the highest possible percentage of my target audience?”

Content distribution, often in places outside of your “owned” properties, is one of the most overlooked (and underappreciated) aspects of effective content marketing. And distribution does not end with social media.

Here are some of the distribution channels you can build into your plan:

1. Your own employees » You may not have 1,000-plus LinkedIn connections, 10,000-plus Twitter followers, or 5,000-plus Facebook fans. That’s OK. If you have employees, you have people who can act as ambassadors for your company and distributors of your content.

   **Tip:** Be very specific about what and how you want your employees to share content. Give them the links, headlines, and some suggested copy they can use for sharing.

2. Your “friendlies” and “fans” » People and companies like you, whether you know it or not. Partners like you, clients like you, “fans” like you, vendors like you.

   Any good salesperson knows you have to ask for the referral. In content marketing, you have to **ask** for the share.

3. Your email newsletter » You likely have some type of email newsletter, or at least a list of people who have expressed interest in receiving email from your company. Now is the time to use it.

   **Tip:** If you are producing targeted, valuable content, include it in your email newsletter and then keep an eye on the open and click rates.

4. Syndicate your content » Whether you’re having trouble building your own audience or not, consider putting your content in front of someone else’s audience. You know your industry, and you know the web and print publications that matter to your industry. Sometimes it’s as simple as reaching out to those publications, showing them your content, and asking if they want to include it in their website or print editions.

The tactics side of this discussion is fairly simple. You cannot market anything without content today. Therefore, when you start building your content marketing plan, you need to think about content marketing as an approach… to **everything**. Your content marketing plan will ultimately impact every marketing tactic, campaign, or program.
All the cool content ideas in the world will mean nothing if you’re not able to build the right team to execute your content marketing plan and give them the right tools to support it.

**Team**

Team decisions are driven by goals and objectives. To address some of these issues, you first have to decide whether you are insourcing, outsourcing, or executing in a hybrid model. Staffing and operating a content marketing team is no easy task, even if you’ve assembled a dream team. Trying to assign content creation tasks to an existing and possibly already overworked staff is an even more difficult way to execute a successful content marketing strategy.

Consider your team structure carefully.

Here are the types of people you will likely need on your team:

**Executive/Strategist** » The evangelist for content marketing within the organization, this person guides strategy and assembles the team.

**Project Manager/Director** » Not the high-level manager like the executive/strategist, this is the day-to-day tactician. Sometimes people try to combine this role with the editor, but an editor is a specialized job, and for the best result, should really be a distinct role.

**Editor** » The publishing world has always understood that writing and editing are different. The digital world is still catching up. Hire a great editor who can identify a good story, but also has the skills to polish every piece.

**Writer(s)** » These are the workhorses of your content marketing team, and some may come from within your own ranks. It takes a constant stream of engaging, topic-relevant content to keep the content engine functioning.

**Optimization/Distribution Specialist** » Unless you are creating and distributing dozens of pieces of content daily, optimization and distribution can be rolled up into one position. You’ll want someone who pays attention to detail, and isn’t afraid to put on their research hat for long stretches.

**Data Analyst** » If you’re doing content marketing the right way, you’ll have lots of data. You will need someone not just to corral all of the data, but to interpret it and suggest changes based on this interpretation.

**Social Media Manager (optional)** » Remember, your optimization/distribution specialist will be handling the content marketing aspects of social media, and depending on the nature of your organization, you may not need someone to manage social media outside of content marketing. So this is optional. The key is not to let the social media tail wag the content marketing dog.
Tools

For maximum content marketing effectiveness, you’ll also need some technology. We consider these items the five technology must-haves for the modern marketer, and suggest that you address them before you launch your content marketing initiative.

**Content management system (CMS)** » A CMS is no longer a nice-to-have for most marketers but an essential tool in the arsenal. When choosing a CMS, make sure it meets your needs, not just for now but where you see the business going in the future.

**Blogging platforms** » With content as a key driver of marketing, a blog is an absolute must. WordPress is far and away the most popular and supported self-hosted blogging platform. The important part is self-hosted, the key is to have complete control over your content.

**Customer relationship management (CRM) software** » For modern marketers to understand the activities that drive not just top-of-funnel leads but also leads that convert to customers, it’s critical that marketing is wired into the CRM system (and that everyone actually uses it). There are lots of options to choose from, and much like with a CMS, it’s important to look at what your needs are and what systems you want to integrate.

**Marketing automation software** » For many B2B marketers working with long, complex sales cycles involving multiple decision makers, one of the critical tools to help you prove your ROI is marketing automation software (platforms like Eloqua, Marketo, Hubspot, and Pardot). Marketing automation holds so much promise because, when used properly and in tandem with CRM, it bridges the gap between marketing and sales, helping each run more efficiently and effectively.

When choosing a platform, make sure you look at ease of use, the people in your organization who will use it, and how well it integrates with your CRM.

**Web analytics** » In a marketing universe where most everything must be tracked, a web analytics package is key to understanding user behavior, what’s working on your site (and what isn’t), where traffic is coming from, and how to optimize your performance and outcomes. Popular tools include Google Analytics, Omniture, and a host of others.

A CMS is no longer a nice-to-have for most marketers but an essential tool in the arsenal.
Content marketing has always been tough to measure in a closed-loop fashion, and that was before Google made it even harder. That’s no excuse, however, for throwing in the towel on measurement.

The fact is that many facets of content marketing are measurable to the nth degree. If you’re not tracking against leading indicators such as awareness, readership, and engagement, shame on you. If you’re having trouble tracking against leads and acquired customers, join the crowd.

Your plan needs to include a measurement initiative that ties your goals and objectives back to actual performance. If your content marketing goals and objectives are going to align with your business goals, your measurement goals need to align, too.

For each stage of the marketing funnel, decide which metrics will help you judge whether you are reaching your goals. Metrics such as page views, unique visitors, and views are important in the sense that without them you won’t generate leads, but a million unqualified visitors who don’t need your services are useless. Measure everything you possibly can — however, report only the few, business-focused key performance indicators (KPIs) that truly influence your goals.

If your content marketing goals and objectives are going to align with your business goals, your measurement goals need to align, too.
Build Your Content Marketing Plan: A 10-Step Guide

**step 10**  » Establish Measurement and Reporting Guidelines

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## Content Marketing Metrics

**Wondering what to measure?** Here are 40 options. Do **NOT** try to measure them all — instead, choose the metrics that match best with your company’s goals.

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For more detail, see original content, “A *Smörgåsbord of Content Market Metrics,*” by @Lakey on econsultancy.com.

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Do Content Marketing the Right Way

Putting a content marketing plan together is not simple. Deciding to skip the content marketing planning process, however, can be even more complicated. Don’t move forward without a documented plan. You’ll find yourself among the almost two-thirds of marketers who don’t find content marketing effective. Worse yet, you may miss your chance to do content marketing the right way.

More on Content Marketing from the Marketing Trenches blog.

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