



FUELING CONTENT MARKETING WITH TECHNOLOGY

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By JODI HARRIS published JANUARY 3, 2016

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2016 Content Marketing Toolkit: 23 Checklists, Templates, and Guides

If



content marketing predictions made by leaders like Joe Pulizzi, Sarah Mitchell, Carlos Abler, and several others are any indication, 2016 could truly be the year when brands finally start to de-silo their content efforts and operate as fully functional publishers.

This means it's time to significantly ramp up your content capabilities – or acquire them from other companies – if you don't want to fall far below the competition when it comes to engaging with today's tech-savvy and social media-sophisticated consumers.

Regardless of whether your business is looking to **build or buy** your content marketing expertise, setting yourself up for greater success will take dedication, determination – and **an enterprise-wide view** of every piece of content you produce. Fortunately, the processes don't need to be overwhelming if you have the right tools and guidance on hand.

When it comes to creating successful content marketing initiatives, I've found that most of the tasks can be divided into four key areas (with a bit of overlap here and there): **thinking, planning, doing, and improving**.

With this in mind, I've compiled a DIY tool kit of checklists, templates, and resources that can help make running your **content marketing program** a lot more manageable.

Thinking phase

In this strategy development phase, your business must determine why and for whom it's creating content and what goals it will achieve. It's also the phase where you elicit the stakeholder support you need to position your content marketing program for optimal success.

The DIY tool: This checklist provides a concise overview of the key factors you will need to consider as you develop – or refresh – your content marketing program.

CONTENT MARKETING SUCCESS FACTORS

Getting buy-in is critical, but it's just one of a number of factors that have been found to give a content program its best chances for success:

CHECKLIST: CONTENT MARKETING SUCCESS FACTORS

- Having executive buy-in/vision
- Taking a longer-term view
- Employing a collaborative and integrated approach
- Assembling a dedicated content marketing team/leadership
- Having the ability to demonstrate content marketing
- ROI/value
- Fostering a culture of change and openness
- Having the ability to tap into subject matter expertise



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Getting buy-in: A lot of moving parts need to be tended if you want to run a well-oiled content marketing machine. But there's one barrier in particular that is sure to throw a monkey wrench into the works if you don't attack it head-on: lack of **executive support.**

The DIY tool: The following checklist can help you prepare a compelling case and assure stakeholders that your content

CMOs, CCOs, Marketing Execs: Don't miss our 40-person, exclusive Executive Forum! [Apply](#)

goals.

Now

CHECKLIST: THE BUY-IN CONVERSATION

CONTENT MARKETING PRINCIPLES AND TECHNIQUES

- I have a solid understanding of what content marketing is — and what it isn't — and can clearly explain the factors that are required to make our program successful.



AUDIENCE IMPACT

- I am aware of relevant consumer behaviors and preferences when it comes to content — both in general and specific to our industry.
- I have spoken with our consumer-facing teams to gain an understanding of who our target consumers are, what their pain points are, and what types of content might help us address their needs and interests.
- I understand our typical buyer cycle and am prepared to map the content we create to the stages of the funnel where it can provide the greatest impact.

BUSINESS BENEFITS

- I am aware of our company's key business and marketing goals (in terms of sales, brand awareness, lead generation, web traffic, engagement, or other KPIs) and am prepared to document a strategic plan for using content to impact these goals.
- I am prepared to discuss specific ways content can be used to unite and support the efforts of our company's sales, marketing, and other functional teams.
- I am aware of our competitors' content initiatives, and can discuss where opportunities may lie to fill an unmet need or gain a competitive advantage with our own content program.

BUDGET AND RESOURCE USAGE

- I have compiled estimates on the budget and other resources we will need for efficient content creation and management and can discuss this information in detail, when required.
- I am prepared to put workflow processes in place to ensure the most efficient and effective use of the resources we allocate to content marketing.
- I have a plan for benchmarking our content efforts and measuring their impact so we can optimize them on an ongoing basis.
- I am aware of the ROI we would need to achieve in order for our program to be considered successful.



RECOMMENDED FOR YOU:

Get everything you need to master the buy-in conversation in CMI's [Essential Starter Kit](#).

Building a strategy: According to our [2016 Benchmarks, Budgets, and Trends](#) research, 53% of the most effective content marketers have a documented strategy. A strategic road map is essential for enterprise content initiatives, as it helps everyone in your organization understand the opportunities and challenges involved, prioritize projects, and execute on each effort with a shared purpose in mind.

The DIY tool: While there's no one-size-fits-all template for developing a strategic road map, this guide to the [essentials of a documented content marketing strategy](#) will walk you through all the issues you should be prepared to address.

Developing a mission statement: A [content marketing mission](#) is an outline of a company's reason for creating content, and the priorities and perspectives it will uphold in pursuit of that mission. As it helps to define the unique content marketing value your business provides, it's a critical component for governing your content creation efforts and keeping them focused on your business goals.

The DIY tool: Use this worksheet (created as part of CMI's workbook on [launching a content marketing program from the ground up](#)) to hone in on the key components that should comprise your organization's unique content marketing mission.

YOUR TURN: CREATE YOUR CONTENT MARKETING MISSION STATEMENT**1 What is our goal?**

2 What target audience can help us satisfy that goal?

3 What valuable experience can we deliver at a key stage of their journey?

4 What makes OUR approach to delivering this value different?

Our mission: _____

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Building audience personas: A **buyer persona** is a composite sketch of a key segment of your audience; it characterizes who they are, what their relevant needs are, and what role they are likely to play in the purchasing process. Without personas to guide your decisions, you are more likely to revert to creating content around what *you* know best (your products and company) instead of around the information *your audience* is actively seeking.

The DIY tool: This guide will walk you through everything you need to **create easy, yet actionable, content marketing personas**.

Mapping it all out: Once you determine your mission, target audience, strategic goals, and objectives, the next step is to build a framework that defines how your organization will use content to achieve them.

The DIY tool: The step-by-step process outlined in this [post](#) by Brain Traffic's Meghan Casey will show you how this is done.

Planning phase

I call this phase the “reality bridge,” as it describes the actions necessary to take your content marketing program from its existence as a lofty strategic ideal to its realization as a fully functional and productive content marketing engine.

Building the framework for your content plan: Repeat after me:

Content marketing works best when you plan for its success.

Mapping key considerations, such as your topics and ideas, procedural guidelines, workflow processes, and channel priorities before you start to write will make it much easier to keep the high-quality content flowing smoothly, and overcome any unexpected challenges that may arise.

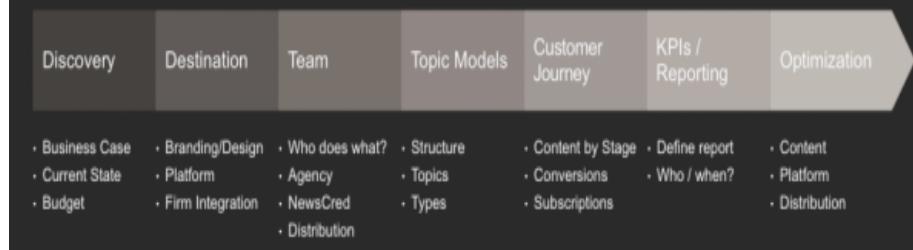
#Contentmarketing works best when
you plan for its success by @joderama
via @cmicontent

[CLICK TO TWEET](#)

The DIY tool: Not only does this [road map template](#) from Michael Brenner address the essentials of a solid content marketing plan, it can also help you account for specific details that are relevant to your company's unique business case – like team resources, topics, and [key performance indicators](#).

Content Marketing Roadmap

- Budget
- Destination
- Frequency
- Amplification / Optimization
- Collaboration (Who does what)



Identifying your customers' journey: Providing your audience with a rewarding experience is the whole point of content marketing. So it's essential to understand their consumption preferences, engagement habits, and pain points – as well as how those needs may change over time – if you expect your content to deliver the kind of value that will help you forge deeper customer relationships.

Providing your audience with a rewarding experience is the whole point of #contentmarketing by @joderama

[CLICK TO TWEET](#)

The DIY tool: Customer journey maps like the one below (originally shared in this [post by Marcia Riefer Johnston](#)) make your personas more actionable by helping you focus on the user state as you determine the content topics, story ideas, formats, and channels to leverage as part of your plan:

Customer-Journey Map				
Persona	User State	Journey (including tasks)	Channels	Content

The Next Generation of Content Strategy: Building a Performance Driven Model
Information Development World 2015 Workshop

Kevin Nichols and Paula Land

Learn how to develop the most efficient, scalable content marketing strategy possible. Register to [attend the 2016 Intelligent Content Conference](#).

Aligning content ideas with business goals: If you want your content to reach the right people at the right time, on the right channels, and drive them to take action, you need accurate audience data to inform your publishing plans, as well as the specific content ideas you execute.

The DIY tool: This multichannel content marketing planner, created by strategy expert [Lisa Copeland](#), is an easy-to-use, easy-to-share way to capture the data and data-related insights that lead to a strategically aligned content creation.

The Multichannel Content Marketing Planner							
The Right People		The Right Content		The Right Time			
Audience Segments	Interest/ Consumption (Insights-Driven)	Content Types	Topics	Channels			
				Desktop	smartphone	Watches	Kiosks
Pregnant Women	82% of pregnant women reported going online once per week for information*	Infographics	Interactive Infographic showing stages of pregnancy and what to expect.	x	x	x	x
Pregnant Women	67% signed-up to receive weekly emails about pregnancy*	Emails	Send customized email containing descriptions of new content	x	x		
Pregnant Women	78% read pregnancy or child-birth related blogs*	Blogs	Blogs written by women of various ages showing pregnancy in your 20s, 30s and 40s.	x			
References							
* How do US Women Use the Internet and Other Sources of Pregnancy Information? A Listening to Mothers III Data Brief May 2013							

Structuring your team resources: Because there are just so many moving parts to effective content marketing creation and distribution, it's imperative that everyone involved knows who is responsible for each task and that all the most essential tasks are being accounted for in your content marketing process.

The DIY tool: Joe Pulizzi has outlined **10 content marketing roles** he believes every brand will need to fill if it wants its initiatives to be successful.

RECOMMENDED FOR YOU:

Need to hire for any of these roles within your organization? Look for candidates who can bring **these essential skills** to the table.

Establishing your editorial guidelines: At a minimum, your editorial content plan should outline the defining characteristics of your brand identity (as it relates to the content you will

publish), the preferred voice and style of your content, and the editorial standards governing your content efforts.

The DIY tool: Use the publishing guidelines cheat sheet below to determine and document this information.

PUBLISHING GUIDELINES CHEAT SHEET

- ▶ Our brand is _____ (adj), _____ (adj) and _____ (adj).
- ▶ Our tone should be (irreverent/serious/educational/fun-loving/inspirational/other_____)
- ▶ We will publish (original/curated/a mix) content.
- ▶ We will publish every (day/week/month/other_____)
- ▶ We will allow authors to repost their content under the following conditions_____
- ▶ We will link to other sites/pages in the following circumstances_____
- ▶ We will acknowledge/promote our contributors in the following way_____



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Setting your editorial calendar: This most steady and stalwart of tools in the content marketer's arsenal has transformed itself over the years, from a simple spreadsheet for tracking what we publish to an essential component for managing the entire life cycle of our organization's content marketing program.

The DIY tool: The CMI team uses a multi-tabbed spreadsheet that's based on the [editorial calendar template](#) below to keep our content ideas organized from conception to completion. Click to download your own copy, which you can customize to your team's specific content needs.

	A	B	C	D	E	F	G	H	I	J
	Author	Headline	Status	Call to action	Category	Notes				
2	Week of November 3									
3		Monday, November 3, 14								
4		Tuesday, November 4, 14								
5		Wednesday, November 5, 14								
6		Thursday, November 6, 14								
7		Friday, November 7, 14								
8		Saturday, November 8, 14								
9		Sunday, November 9, 14								
10										
11	Week of November 10									
12		Monday, November 10, 14								
13		Tuesday, November 11, 14								
14		Wednesday, November 12, 14								
15		Thursday, November 13, 14								
16		Friday, November 14, 14								
17		Saturday, November 15, 14								
18		Sunday, November 16, 14								
19										
20	Week of November 17									
21		Monday, November 17, 14								
22		Tuesday, November 18, 14								
23		Wednesday, November 19, 14								
24		Thursday, November 20, 14								
25		Friday, November 21, 14								
26		Saturday, November 22, 14								

Normal View | Ready | Sum=0

RECOMMENDED FOR YOU:

Want more guidance on creating an editorial calendar and keeping it filled with relevant story ideas? Check out our complete [checklist of editorial calendar essentials](#)

Creating your channel plan: This component of your editorial plan governs how, when, and on what specific platforms you will publish content, as well as any rules of engagement that your organization would like to set for interacting on those channels.

The DIY tool: Fill in this cheat sheet for each channel you plan to leverage in your content marketing initiatives.

CHANNEL PLAN CHEAT SHEET

Here are a few starter considerations you can fill in. Make sure to repeat this exercise for each specific channel you will publish content on.

Channel Plan: _____.

- ▶ We will publish (original/curated/a mix) content.
- ▶ We will publish _____ (number) of posts every (day/week/month/other) _____.
- ▶ We will distinguish ourselves from our competition by _____.
- ▶ We will provide the following assets: (links/photos/videos/text only/other) _____.
- ▶ On social media, we will always/never _____.
- ▶ Only _____ team members are authorized to publish to this channel without prior message approval.
- ▶ _____ team members will be provided with logins to this channel.
- ▶ Tech issues should be referred to _____.
- ▶ Customer/audience issues should be referred to _____.

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Doing phase

Once you've set your strategy and outlined your plans for executing it, it's time to start creating those **compelling, customer-driven stories** that will help you reach that content castle in the sky. Though the creative process is unique to every business, plenty of tools can help with generating story ideas, organizing them into relevant content pieces, and sharing them with a target audience.

Brainstorming ideas: Team brainstorming sessions are a great tool for getting the creative juices flowing and coming up with new ideas for content creation.

The DIY tool: Follow this simple, seven-step sticky-note-based process [outlined in this post by Jay Acunzo](#) for more productive content marketing brainstorms.

Prioritizing your productivity: Not every suggested idea will be a good fit for your content marketing strategy. Some others may be fantastic on paper but require more time and resources than your team can spare. When these situations arise, it helps to have a process for determining which projects are urgent, as well as for handling **essential go/no-go decisions**.

The DIY tool: Use a content request form like the one below to help your content team prioritize their own projects – and manage the expectations of external teams that rely on them for content creation assistance.

CONTENT REQUEST FORM

(to be completed by the requestor)

- What is your idea/need?

- What research have you already done on this topic? List 1-3 sources (e.g. websites, presentations, white papers etc.)

- 1.
- 2.
- 3.

- How long do you think it will take to produce?

- 1 day
- 1 week
- 1 month

- How many leads will this produce?

- Don't know
- 0-50
- 50-100
- Thousands over the year

- How much will the content cost to produce?

- Which core business objectives will this content fit with?

- (tick all relevant options)
- Objective A
 - Objective B
 - Objective C

- Where does it fit within the sales funnel?

- (tick one)
- Pipeline generation
 - Lead generation
 - It moves people from one stage of the sales cycle to the next.

- What will the impact be if this is not produced?

- How will you commit to sharing this content with a wider audience?

Managing your ongoing progress: The more you blog, the more you need a simple, scalable way to track your previous blog posts and plan your future blog content.

The DIY tool: Follow the **three-step post-tracking process** shared by Roger C. Parker to help you streamline and scale your content creation efforts.

Curating content: Curation is a great way to maximize your

content resources and get the most value out of every piece of content you publish. However, it can be challenging to ensure that you are discovering, producing, and sharing the right information to make a positive impact on your target audience.

The DIY tool: Use this scorecard [created by Roger C. Parker](#) to gauge the quality and consistency of your content curation efforts over time and to make sure you are staying on the right track.



ROGER C. PARKER'S PUBLISHED & PROFITABLE
Content Curation Scorecard

WEEK OF _____

CRITERIA	QUESTION	COMMENT
Relevance	Are you selecting topics based on your market's informational needs?	
Uniqueness	Are you recommending content your market might otherwise overlook?	
Context	Are you using comments to provide a context for the content you curate?	
Adding value	Are you posting comments that summarize key ideas and lessons?	
Concise	Are your comments as concisely communicated as possible?	
Visual engagement	Are you using graphics to enhance the value of your comments?	
Organization	Have you organized your curated content into categories?	
Efficiency	Do you curate on a regular basis, and recycle your recommendations?	
Tracking	Are you analyzing the popularity of the various topics you curate?	
Serendipity	Do you occasionally curate surprising or provocative content?	

Content Curation Scorecard for Content Marketing Success from Roger Parker

Crafting compelling headlines: Headline writing may just be the most difficult part of content creation. Headlines need to grab attention, but should be clear, relevant, and understandable, so readers find exactly what they expect when they choose to

engage with your content.

Headlines need to grab attention, but should be clear, relevant, and understandable by @joderama

[CLICK TO TWEET](#)

The DIY tool: This checklist, from our guide on [cooking up a killer headline](#), outlines the rules every content creator should follow, along with some suggestions for spicing up your efforts once you've mastered the basics.

9 RULES FOR SERVING UP AN APPETIZING HEADLINE

- 1. Start with the essential ingredients.
- 2. Use just a dash of SEO-sining.
- 3. It's OK to tease, but don't disappoint.
- 4. Don't stuff your readers full of "bread."
- 5. Create snackable appetizers.
- 6. Survey the competition, but serve a signature dish.
- 7. Prepare the perfect pairing for your context.
- 8. Serve your patrons reliably and consistently.
- 9. Fuel reader excitement with actionable words.



<http://contentmarketinginstitute.com/2015/08/headlines-tips-tools>

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Listening to your community: It's one thing to create content that you *think* your audience will like; but the one true way to gauge the impact your content is having on your audience is to

listen to the conversations they are having on social media about your business.

The way to gauge the impact #content is having on your audience is to listen to convos on #socialmedia. **[CLICK TO TWEET](#)**

CLICK TO TWEET

The DIY tool: Use this content review template created by James Prideaux to track relevant social media conversations and document any analysis extracted from your listening activities.

Click to enlarge

Improving phase

These tasks help you maintain, strengthen, and grow your content kingdom by identifying what's working (and fixing what isn't), enhancing the value and impact of your efforts, and amplifying your content's power through strategic promotion and optimization techniques.

Maximizing the value of your platforms: These days, it seems like there's a hot, new content platform hitting the scene before the buzz has even started to cool on the last one. But that doesn't mean content marketers need to start publishing here, there, and everywhere to make an impact. Instead, your business may be better served by optimizing the content you are already publishing on established channels, like SlideShare, LinkedIn, or your blog.

The DIY tool: If you are looking to expand your use of the SlideShare channel or are looking to get stronger results from the content you publish there, this [e-book of SlideShare secrets](#) can help you stack the decks in your favor.

Promoting content: Content marketing promotion can take many forms, such as sharing your published content on your [social channels](#), enlisting the assistance of [industry influencers](#), incorporating [native advertising](#) and other [paid media](#) opportunities, or leveraging other [non-obvious promotion techniques](#).

The DIY tool: If a blog post gets published in a vast, crowded landscape, will the right audience be able to find it? Perhaps. But your chances will be significantly improved if you follow this [checklist from Mike Murray](#), which features over 50 tips for marketing your blog content.

Optimizing for search engines: Optimizing your content marketing for search can feel like a game of Clue – a process of trial and error where you may encounter a lot of false starts and dead ends before finding the right path to success. But there are more strategic ways to plan and manage your SEO efforts so that your content draws in your target audience and delivers the value they are looking for.

The DIY tool: Following the 10 steps outlined in this [SEO Clues infographic](#) – as well as the additional tips that Tracy Gold offers in her [ultimate SEO checklist](#) – will make it easier to solve the mysteries of search-driven content discovery and improve your rankings for relevant searches.



[Click to view full graphic](#)

with this graphic.</p>

<p></p>

<p></p>

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Code for the infographic

Measuring success: Your content is only as good as its ability to support your marketing and business goals. It's not enough to just create and distribute the content you think your audience needs. You must also track and evaluate its performance on an ongoing basis.

The DIY tool: Follow the simple plan outlined by CMI's Marketing Director, Cathy McPhillips, for **measuring content marketing effectiveness** – including her KPI tracker template and a list of common goals and their associated metrics.

Company Name Monthly KPI Tracker	 CONTENT MARKETING INSTITUTE	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	GOAL
Goal #1														
PERSON WHO IS RESPONSIBLE FOR COLLECTING		Specific metric for measuring this		Specific metric for measuring this										
Goal #2														
PERSON WHO IS RESPONSIBLE FOR COLLECTING		Specific metric for measuring this		Specific metric for measuring this										

RECOMMENDED FOR YOU:

Not sure which metrics will lead to the specific content insights you need? Check out this [quick and easy ROI tip sheet](#)

Go forth and conquer

While these tips, tools, and templates will help you start tackling many of the challenges involved in successful content marketing, they are no substitute for a thorough understanding of the principles and techniques they represent. If you have questions, or would like additional insights on any of these topics, let us know what information you are looking for by adding a comment.

To help you conquer content marketing throughout the year, subscribe to our daily or weekly email.

Cover image by Joseph Kalinowski/Content Marketing Institute

- ▶ [The Ultimate SEO Checklist: 15 Steps to Optimize Your Content Marketing Plan](#)
- ▶ [A 2-Step Editorial Calendar Template that Can Boost Your Content Marketing Productivity](#)
- ▶ [7 Stolen Content Marketing Ideas You Can Use Today](#)
- ▶ [Build Your Content Calendar: 3 Easy Steps](#)

Recommended by

Author: Jodi Harris

Jodi Harris is the Director of Editorial Content & Curation at Content Marketing Institute. As an experienced content management consultant, Jodi focuses on helping businesses analyze their content needs and resources; build infrastructure and operations; and create and distribute relevant, engaging brand messages across multiple media channels and platforms. Jodi has developed and managed print and digital content projects for marketing, entertainment, automotive, health care, and biotech publishers, as well as for entertainment industry and media brands. Follow Jodi on Twitter at [@Joderama](#).

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Kevin Nichols · a day ago

Hey there, great list and thank you for featuring the customer journey map. I would also highly recommend: Content Strategy Alliance free tools and templates handbook with over 40 free templates:
<http://contentstrategyalliance...>

^ | v · Reply · Share ›



David Butler · 2 days ago

Let's get organized! Thanks for sharing. For marketers looking to automate creative briefs for increased teamwork and alignment, check out Story Sheets at www.ipositioning.com

^ | v · Reply · Share ›



Indio John · 4 days ago

Really nice marketing tips you shared, Hope so they works.

^ | v · Reply · Share ›



Alex Rinsky (Insighter.io) · 4 days ago

A great resource for organizing and focusing your content marketing activities

Personally, I am not sure be I'll able to be soooo organized
but will start with the following 3:

Developing a mission statement:

Establishing your editorial guidelines:

Creating your channel plan

Hope that once these are implemented will continue to add one layer at a time- thanks Jodi!

^ | v · Reply · Share ›



Jaqui Lane · 5 days ago

Brilliant. Thanks everyone who contributed to this. I

have set aside this week to 'finally get around to' my thinking, planning, strategy and plan. This is a) a great reminder, b) a terrific prompt and c) scary as I am a one-person show. That said, at least I am a business writer so that bit at least should be somewhat easier. No excuses now.

^ | v · Reply · Share ›



TapAnalytics · 5 days ago

A great article to kickoff 2016! This will be very helpful for businesses and marketers who are looking into boosting their content marketing this year.

1 ^ | v · Reply · Share ›



James Brauer · 5 days ago

Definitely awesome post! So many great resources curated for novice and veteran content marketers.

Thanks, all!

^ | v · Reply · Share ›



Ricardo De Lucia Leite · 5 days ago

Indispensable materials summarized in a single post,

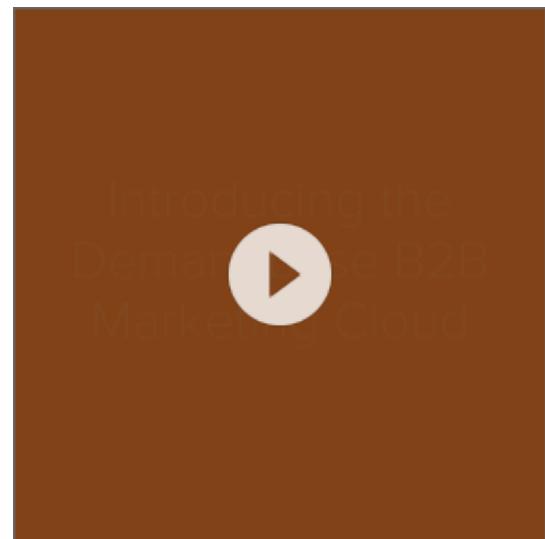
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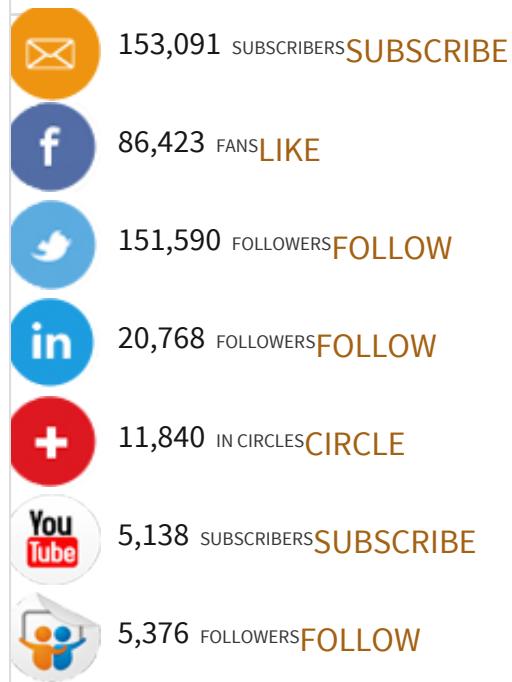
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PLAN

[Build fundamentals of your plan](#)

AUDIENCE

[Understand your core audiences](#)

STORY

Tell your brand story

CHANNELS

Determine your distribution channels

PROCESS

Manage your team and tools

CONVERSATION

Create your content and listen

MEASUREMENT

Prove the effectiveness of your program

Current Hits

All Time Hits



27+ Handy Tools for Better Visual Content Marketing

October 18, 2015



How to Make Every Piece of Content SEO Friendly

November 16, 2015



What Content Marketing Will Look Like in 2016: 40+ Predictions

December 14, 2015



5 Essential Skills for Content Marketing Copywriters Today

October 13, 2015



Wonder What Content to Create? Try a Customer-Journey Map [Template]

November 5, 2015



11 Best Browser Extensions for Content Marketers

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11 Resources to Curate, Clip, Collect, and Collaborate Content

November 1, 2015

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