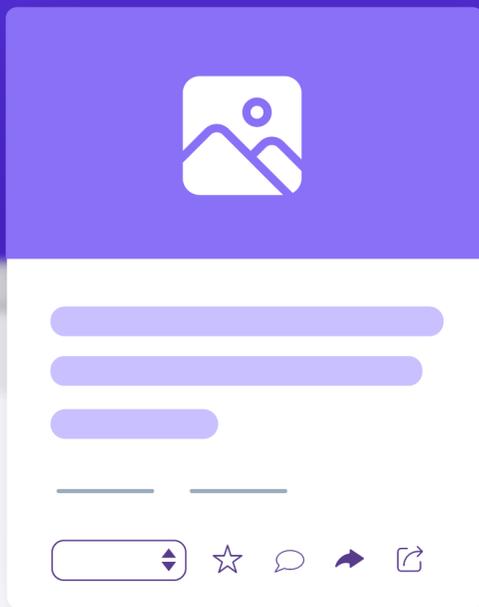


# HOW TO drive revenue through content without writing it.



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# HOW TO DRIVE REVENUE THROUGH CONTENT - WITHOUT WRITING IT

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## *A step-by-step workflow from UpContent*

It's time for your team to position themselves, and your company, as trusted resources to provide your customers, prospects, and other team members with the most valuable insights of the day, but...

- Your sales team is constantly requesting more content to share across their social media and email profiles that will drive new business.
- It's been near impossible to keep your employees engaged and grow adoption in coordinated social selling and employee advocacy efforts.
- You've identified that by blending properly curated articles with your original content creation and promotion, you can keep your team happy and increase your conversion rates.
- The mere thought of implementing yet another suite of technology siloed from your other efforts is enough to prompt yourself, and your team, to consider a career change.

*Well, you've come to the right place.*

This workbook is designed to help you set the foundation for your strategy, get your workflow in order, outline a rollout plan, and actually get this off the ground and running. No more guessing games. Your team, whether big or small, will know who is responsible for what and exactly what they need to do to gain the real benefits of content curation.

## LET'S GET STARTED!

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## LAYING THE FOUNDATION

Whether you are a “*Team of One*” or you have multiple teammates ready to take action, it’s important to start with the basics. It may be tempting, but don’t skip this step! Together, review your goals, responsibilities, and process as a group.

We’ve outlined some of the main points to be addressed and provided some helpful worksheets for mapping out your unique curation process to ensure a successful implementation.

### WHY SHOULD WE BE CURATING?

- Define what a successful curation flow looks like. The optimal goal is to evolve to a point where the process of identifying and recommending pertinent articles becomes habitual and the distribution efforts fold into your current marketing and sales strategies.
- What are the metrics needed to track this success? Some areas to consider:
  - Metrics by channel (social media, email, website)
  - Engagement?
  - Conversion?

### WHAT SHOULD WE BE CURATING?

- Create a list of relevant topics that your customers, prospects, and employees would find valuable.

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## WHO SHOULD BE CURATING?

- Look outside the immediate curation team to identify subject matter experts (SMEs) and (if applicable) compliance team members that should be involved in the definition and execution of your curation process.
- Assign role(s) and responsibilities to each team member. We'll dig into this a bit more, later on.

## WHERE SHOULD WE BE CURATING?

- Identify the channels where you wish to deliver curated articles. Be sure to consider your internal and external audiences.
- Outline the desired journey you'd like visitors to take after engaging with curated articles on each channel.
- Determine how curated content can flow easily into the distribution technologies and processes you are already using – rather than having to define new or independent activities.

## HOW SHOULD WE BE CURATING?

- Where the What, Who, and Where, all come together.
- Define a workflow for how articles move from being identified by a team member, through any approval requirements, to being distributed on one or more of your company's or employee's digital channels.
- Agree upon a schedule for curated content distribution that includes which platforms and their respective frequencies.
- Work back from your distribution schedule to create a timetable, and process, for curating to consistently meet posting timeline

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## WHY?: DEFINE SUCCESS

*Identify what a successful content curation strategy would mean for your organization.*

What does successful curation look like?

Which metrics will measure the progress toward this definition of success?  
How do these metrics tie to the organization's larger goals?

What are 1-3 specific curation goals you want to achieve in the next month as a team?

1.

2.

3.



**Pro tip:** Be sure to define leading and lagging indicators - considering both internal and external audiences. "More leads" is great, but what other metrics can be defined to help understand how best to adjust effort to increase the "more leads" metric further?

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## WHAT?: OUTLINE YOUR CURATION NICHE

*Brainstorm a list of topics your target audience is interested in that relates to your brand's mission. Be as specific as possible.*

What are the articles we wish **our prospects and customer would have read** before speaking with us?

What are the articles our prospects and customers wish **we would have read** before speaking with us?



**Pro tip:** Don't just ask those amongst those responsible for marketing. This is a great way to get your sales and business development team engaged in the process, and ensure what you provide will meet their goals as well.

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## WHAT?: DEFINE YOUR TOPIC CRITERIA

Use the guide below to create a search phrase for each of your topics. You don't need to fill in all of the blanks. Find a balance between the volume of articles that will be returned and the time you and the team will allocate to curating from the results.

### **Example:**

Topic: Cybersecurity

I want to find content about **cyber** AND **security**.

Each of my results must also include **trend** OR **risk** OR **breach**.

I do NOT want to see articles that include **patch** in my results.

**Topic 1:** \_\_\_\_\_

I want to find content about \_\_\_\_\_ AND \_\_\_\_\_.

Each of my results must also include \_\_\_\_\_ OR \_\_\_\_\_.

I do NOT want to see articles that include \_\_\_\_\_ in my results.

**Topic 2:** \_\_\_\_\_

I want to find content about \_\_\_\_\_ AND \_\_\_\_\_.

Each of my results must also include \_\_\_\_\_ OR \_\_\_\_\_.

I do NOT want to see articles that include \_\_\_\_\_ in my results.

**Topic 3:** \_\_\_\_\_

I want to find content about \_\_\_\_\_ AND \_\_\_\_\_.

Each of my results must also include \_\_\_\_\_ OR \_\_\_\_\_.

I do NOT want to see articles that include \_\_\_\_\_ in my results.



**Pro tip:** Defining the criteria for your topic areas is TOUGH. We see our customers often iterating on these criteria a number of times as their strategy evolved, and metrics are reviewed. Look to those (including your dear friends at UpContent) to help you get those criteria “just right”.

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# WHAT?: SET THE CURATION GUIDELINES

*Determine what criteria must be met in order for an article to be considered for curation. Use these guiding questions as a foundation and add your own.*

**Content must:**

- *Be written by a reputable source (yes, you likely now need to define “reputable” – sorry)*
- *Be formatted so that it is easy to read*
- *Inform or entertain my target audience*
- *Provide a unique perspective on a topic my audience cares about*
- *Complement or support my original content*
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**Pro tip:** *Focus less on the names of the publications and more on the quality of the articles that should pass your filters. It can be easy to fall into the trap of saying, “We only want to share articles from X, Y, and Z major publications.” However, doing so can greatly diminish the value of your curation efforts. Remember, the goal is for this to be seen as a service that surfaces the best articles, and not just simply reposts all content from the same handful of publications.*

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## WHO?: ASSIGN ROLES & RESPONSIBILITIES

*We've compiled a set of roles and responsibilities that can be helpful to categorize and assign to team members both within, and beyond, the traditional marketing team. Remember, these are roles, not necessarily staff positions, so you may be responsible for more than one (or all) of these roles. Make note of any additional responsibilities.*

### Content Strategist: \_\_\_\_\_

- Spearhead the overall content strategy and analyze its effectiveness and sustainability.
- Ensure alignment between original and curated content in terms of quality, type, topic, and timeliness.
- Manage team members by listening and providing feedback regularly.
- Get involved in the curation process as needed, but not often active on a day-to-day basis.

#### NOTES:

### Content Scout: \_\_\_\_\_

- Identify reputable sources, publications, and thought leaders that provide content that meets the criteria defined by the team.
- Research tools and platforms that best suit the curation needs of the team.
- Listen for new resources that may better serve the intended audience.

#### NOTES:



**Pro tip:** Both the **Content Strategist** and **Content Scout** roles are more strategic rather than tactical and thus are most often activities that are conducted on a periodic basis - or as a need is defined by the larger team.

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## Curator(s): \_\_\_\_\_

- Access the sources identified by the Content Scout, skim headlines, and narrow content to a list of potential options.
- Read the content in its entirety.
- Assess the quality, reputability, and value of the content using the criteria defined by the team.
- Make note, or flag, the content for use by the Distributor - following the specific workflow that has been defined.

### NOTES:



**Pro tip:** *In many cases, it is best to have individuals outside your traditional marketing team fill this role. Subject matter experts from across the organization, including those in a business development or client/customer success position make great Curators.*

## Distributor: \_\_\_\_\_

- Review content selected by Curator and organize by channel and intended audience.
- Distribute content to appropriate channels at designated times to maximize impact, considering timeliness around holidays, event, and macro developments.
- Add a unique perspective, provide feedback, ask a question, and/or cite the original source in each accompanying message, for each channel.
- Utilize current digital distribution technologies to manage the distribution of content across digital channels to ensure consistency with original or promotional content campaigns - and unified analytics.

### NOTES:

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## Community Manager:\_\_\_\_\_

- Interact with communities where curated content is being shared.
- Follow up with those who have engaged with curated content.
- Facilitate new conversations to build a loyal, interested audience.
- Report to Content Strategist and team on what content is performing best.

### NOTES:



**Pro tip:** *Don't forget about your internal community Apply the same test for content effectiveness and resonance with your internal team as well as your external audience.*

## WHERE?: CREATE A PUBLISHING SCHEDULE

Identify the platform(s) you plan to utilize for your brand, how frequently you will publish curated content, and at what times.

Channel	Frequency	Days to Distribute	Ideal Times
Company LinkedIn	2x/day	S M T W R F S	12:00pm and 4:30pm
Email Digest	1x/week	S M T W R F S	11:00am
Employee Advocacy	3x/day	S M T W R F S	When ready
Website Section	Leverage above process to simultaneously bring curated content to company website.		
		S M T W R F S	
		S M T W R F S	
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**Pro tip:** Be sure to consider how the channels intertwine as part of your audience journey. Audience members who are unfamiliar with your brand may follow a different path from your loyal customers. Consider what the ideal next step is for an individual who engages with a curated article in each channel - and ensure there is stimulus for this journey to continue.

## HOW?: OUTLINE THE WORKFLOW

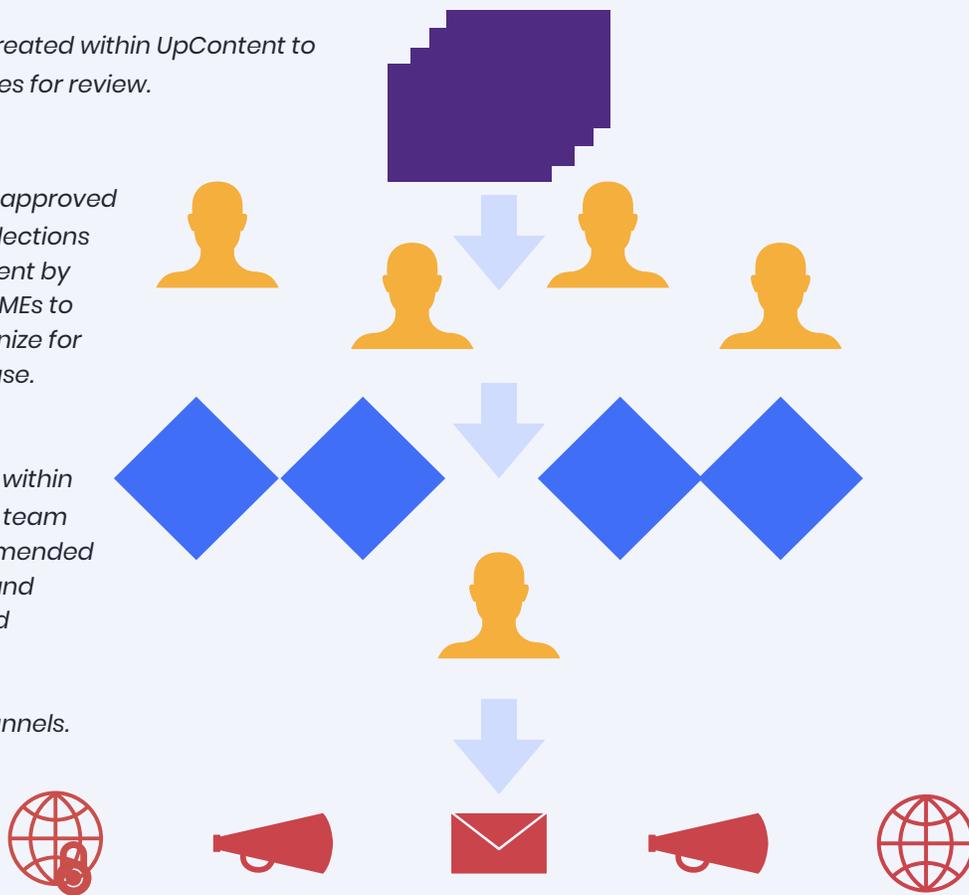
*With the 'What', 'Who', 'Where', and 'When' now defined, you can bring it all together by mapping out how the articles will flow from the Curators to the Distributors (and any steps in between).*

*To help get you started, here is a logic model we created for a customer to work through how their curation strategy would be managed.*

**1.** Topics are created within UpContent to discover articles for review.

**2.** Articles are approved to specific Collections within UpContent by organization SMEs to approve/organize for downstream use.

**3.** Distributors within the marketing team review recommended articles for brand alignment, and distributed to company and employee channels.



**Pro tip:** Note how the Curators are mainly outside the marketing group - tapping into the organization's subject matter experts and business development teammates. The marketing group's main responsibility is to be an orchestrator of the flow - keeping momentum and reducing friction.

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Now that you've built the foundation to your content curation strategy, start implementing it with UpContent, an award-winning tool designed specifically to make curation easy and collaborative while directly interfacing with the distribution tools you already love.

Visit [upcontent.com](https://upcontent.com) to learn more and set time for a **free, 30 minute consultation** to review your curation plan.