

GET OUTSOURCE READY! THE CHECKLIST

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MAKING CONTENT HAPPEN

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Here's every step you need to take to outsource your content quickly, without hassle and safe in the knowledge that your content manager has all they need to do a great job!

● USE A SHARED WORKFLOW

STEP 1

A workflow makes it crystal clear for both you and your content manager what needs to happen and in what order for your content to happen!

I create a Google Sheet for each client which shows every step I take to work on their content and. Each time I complete a task, I mark it on the sheet and my clients know exactly at what stage I am with their content at any one time.

There are so many amazing tools out there designed specifically for this too such as Asana and Trello.

● RECORD VIDEO TUTORIALS

STEP 2

There'll be a lot for your content manager to learn about you, your content and your processes when you first start working together.

Everyone uses different tools and software and it's in your interest to do as much as you can to help your content manager understand them as quickly as possible.

In my experience, there's no substitute for video. To get your content manager up to speed as quickly as possible record video tutorials via Loom or Vidyard on how to do certain tasks.

● CREATE/PASS ON YOUR STYLE GUIDE

STEP 3

You may already have a document which sets out your preferred style of writing. For example, whether you use UK or American English, etc.

If not, it makes sense to create one and pass this onto your content manager to make sure they can get things right from the beginning.

● SEND EXAMPLES OF PREVIOUS CONTENT

STEP 4

One of your content managers biggest (and often hardest) jobs is writing in your tone. Direct them to as much previous content as possible and, if they're writing your email broadcasts, send them previous examples.

● AGREE TO A TRIAL PERIOD

STEP 5

Most content managers will be happy to offer a trial period, perhaps of one month or a couple of weeks before you commit to a monthly retainer.

That said, it's important not to expect perfection in that initial period and bear in mind that it takes time to get into a rhythm and to iron out any glitches.

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● SET UP A DIRECT DEBIT

STEP 6



If you're working with a content manager on a retainer, it makes sense (and may well be part of the terms and conditions of working with them in this way) to set up a direct debit, so that paying the invoice at the start/end of each month is one less job to do.

● DECIDE ON PREFERRED METHOD OF COMMUNICATION

STEP 7



Everyone prefers to communicate differently and it'll be up to you and your content manager to decide what works best.

From experience what I would say is that instant messaging using platforms such as Slack or Messenger and WhatsApp do come in handy when you're just wanting to exchange little bits of information or ask/answer quick questions.

● AGREE ON FREQUENCY OF UPDATES

STEP 8



Depending on the nature of the service or type of package your content manager offers, you may or may not be offered an update or review call at certain intervals.

Even if it doesn't explicitly form part of the service, I would still ask that you have a call at least quarterly to check in with each other.

● AGREE APPROVAL PROCESS

STEP 9



Agree upfront whether or not parts of the content process need to be approved before they're scheduled/published.

More than likely to start with you'll want to approve everything before it's published and I highly recommend you do so that you can iron out any issues and suggest tweaks. As your trust builds you may well feel happy to let content go out without you having checked it, to free up more of your time. Whatever you decide, make sure you communicate it clearly to your content manager to avoid any confusion.

● GIVE FEEDBACK

STEP 10



Giving feedback is crucial to helping your content manager improve week on week and speeds up the process of him/her nailing your tone/style and process.

Give the feedback any way you like, in the form of a video, written notes or comments on a Google Doc.

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● GIVE A GOOD BRIEF

STEP 11

The more detailed the brief, the more chance your content manager will have of hitting the nail on the head and making you happy!

Here's some suggestions that have worked really well for me and my clients:

- Record a short audio bubble on your phone or a short video using Loom or Vidyard giving your thoughts about the angle you'd like your content manager to take when they write your email broadcast.

This way, as soon as they start writing they're heading in the write direction, rather than going in a different one and having to re-write to alter the slant/make a different point

- Add notes onto a Google Doc

● CREATE A CONTENT AUDIT

STEP 12

This is a log of all your existing content. If you don't already have one, create one and it can be as simple as a spreadsheet.

It's really useful for your content manager to have a record of all the content you have, complete with the URLs to any video/blogs for when they need to link to them/reference them in other content.

All that remains now is to go out there and find your dream content manager!

If you have any questions at all, drop me an email at natalie@hotcontent.co.uk