Wheels Up
COLLECTIVE

Complete Guide to
Content Marketing for Startups

Everything you need to build a content strategy that drives revenue



Letter from the Author

Welcome!

At Wheels Up Collective, we believe that content marketing is absolutely foundational for any marketing team that aspires to drive quantifiable revenue. The prospects that your sellers love will be highly educated and already drinking your brand's Kool-Aid. Content marketing is how you queue up those buyers and set up fast sales cycles.

Building a comprehensive content strategy is daunting. There are a lot of moving parts and it can be tough to know where to start. So many teams just "start writing stuff" and hope for the best. You may be creating great content. But, with the shotgun approach, you're likely leaving a tremendous amount of opportunity on the table. With decades of experience in dozens of early stage startups, building content strategies from scratch, all of us at Wheels Up Collective have learned a thing or two about what works and what doesn't. We've created a blueprint for tackling that first editorial calendar, and we're excited to share it with you here. We've even included downloadable templates and easy to navigate timelines to guide you through the process.

Content is likely the most expensive part of your marketing budget, from writing to editing to design to distribution; even short pieces are a considerable investment. All the more reason to make sure that your plan is finely tuned to be a revenue-generating machine. Particularly in the startup world, as a marketer you're continually going to be justifying the value of your department's budget investment. Hold your team's feet to the fire and ensure that everything you do is driving revenue. It makes keeping (and growing) your budget much easier when your CFO stops by for a chat.

We hope this ebook gives you the strategy to start a content marketing program from scratch, or improve the one you already have. I wish you all the best! As a marketer, getting your message out to your audience matters – immensely. It's only a great product if people know about it.

Good luck,

Amy

Amy Winner
Co-Founder, Wheels Up Collective

Getting Started

You don't have to stress out about your content strategy, but you do need to focus. You'll be creating a foundation, intentionally, and then observing and growing what works. At its core, a successful content strategy anticipates what a buyer needs to know, and delivers that intel to them in the right order, at the right time. It preemptively answers the questions they need answered before they are ready to buy, in the order that they are asking them.

A quick google delivers tons of "best practice" information on what kinds of content buyers are looking for. But the truth is, your content needs are unique to your particular solution and customer. You can start with best practice guidelines, but you have to continually optimize with your own experience and data.

Let's start at the beginning and talk about your marketing infrastructure. Regardless of if you ever produce a single piece of content, these assets will help you (and your sales, product, and customer support organizations) all understand your customers. But most of all, they're table stakes to building a revenue-generating content strategy.

INFRASTRUCTURE

We're not talking rebar and welding but, metaphorically, content marketing infrastructure is not very different. It provides an essential structure and deserves your full attention at the very start. Skip these steps and you risk a disjointed message that misses the mark at best, or confuses buyers at worst. Your infrastructure will be made up of the following:

Messaging & Positioning Framework →

Brand attributes, tone, language, value props, features

Buyer Personas →

Demographics, psychographics, considerations, priorities, stakeholders, success metrics

Buyer Journey →

Considerations and criteria for each of the stages: awareness, consideration, and decision

Content Matrix →

Existing content aligned with buyer journey and personas

Editorial Calendar →

Scheduled content aligned by type, channel, audience, and messaging

We'll walk through each of these pieces, explain their importance, and discuss tips on what and what not to do.

Messaging & Positioning Framework

This is a big statement but it's absolutely true: a messaging and positioning framework (MPF) is the most important asset in your marketing toolkit.

At Wheels Up, it's the very first thing we create with every client because it ensures that any work we do is aligned and advancing prospects and clients to higher value engagements. But, it's also the most challenging thing we do. Distilling a whole lot of copy and opinions into concise, inspiring messaging is just plain hard. Your MPF defines and aligns your brand language across all avenues. It builds consistency and frequency.

What is a Messaging and Positioning Framework?

A MPF is a single document that describes your product or service's unique value propositions and differentiations. It organizes this information from the highest level to fairly granular, feature-specific copy. It aligns messaging so any marketing content you build is advancing your key value propositions. It has the sign off of anyone in your organization who needs to approve messaging, which streamlines your content development process.

What makes a MPF such a valuable marketing tool?

An MPF provides alignment and focus. And, if you've worked at a busy company, you know that alignment and focus provide the basis for true success.

Here is a list of the many ways your MPF works for you:

Includes a mosaic of considerations. During your initial brainstorming and information gathering, consider voices from across your organization - sellers, client services, product, customers, industry partners. They all have different but valuable perspectives. And, hearing from everyone will help you build messaging that resonates with the people who interact with your brand.

Gets leadership aligned. Since you'll be including leadership in the process of building and approving your framework, you'll preemptively have buy-in going forward. It can be a great "reminder" tool (wink, wink) to help get projects across the finish line with senior team members since you all, very intentionally, agreed on this framework and its shelf life.

Is a primer you can hand to anyone to get them up to speed, fast. Since it includes a map of the market landscape and how you fit into it (if you did a good job) it'll be all a freelance copywriter or new team member needs to tackle most any marketing project you give him or her.

Helps focus your content strategy. With approved value props and feature messaging, it literally dictates pieces of your content with copy-and-paste ease. And using it this way will ensure that your messaging is consistent across all your marketing outreach. As a bonus, if you're grappling with some writer's block, look over your existing content and see what pieces of your MPF you've missed or haven't touched on recently. Then, find the story to support that.

Serves for a certain phase of growth. Most MPFs are medium-term documents. What exactly medium-term means will be different depending on your organization. If you're a brand new startup that's still trying to prove out product-market fit, that's probably six months. If you're an established company that doesn't have any plans to change offerings, then 18 months is usually about right.

MPFs are always something that we have on our to-review list during strategic planning. Even quarterly, it's worth a quick check in to make sure the messaging is still spot on. It's much easier to make small tweaks as you go and learn than to wait for it to be totally irrelevant and have to start over from scratch. That said, work hard to make sure that any changes you make are extremely intentional and appropriate.

GETTING STARTED:
HOW TO BUILD YOUR FIRST MESSAGING AND POSITIONING FRAMEWORK

Alright, your coffee is hot, you're seated at your computer, and you'd like to get working on this MPF. Here's how you get started.

Research the messaging that's already out there. Go to your existing website and any available marketing collateral. Product or solution information like data sheets, explainer videos, or even support documentation can help make sure you understand what you're representing from a technical perspective. Any customer testimonials, case studies, or even support notes will help you see what the client values. Strategic insight from leadership (like pitch decks) will give you a clear vision of where the company is going. Then external content - your due diligence Google search - will ensure that you know what the outside perspective is.

Listen to people talk about your brand. If you're really paying attention, in person or video interviews are going to give you clues that aren't anywhere in print but are likely the key to really codifying what's special about your company. Go in armed with a list of questions, but also just let people talk. They inevitably bubble up what's really important.

When you're doing your discovery work, take lots of notes about what jumps out at you. Try writing mostly single words that stand out. Inevitably, the same words pop out across many different sources. When that happens, you know you're onto something.

Get it on paper. Now that you've compiled your mosaic of voices, it's time to start writing. At this point it's a personal preference. The framework is shaped like your funnel - it goes from high level, aspirational messaging to the individual features' interpretations for each persona. Where you start and which order you go is entirely up to you. When you're building frameworks, the process is rarely linear and never the same. Usually, when you're done with discovery, at least one section seems easy – so start there. The key is to just get a draft started.

Put it away and come back later. An MPF draft usually takes a few days to get to a v1 because it helps to work on it, then leave it for a day or two and come back to it with fresh(er) eyes. Don't worry if you get stuck on some of the sections. You might not need them for your brand. And ultimately you don't have to build this alone, there's lots of collaboration coming up in the next step. The important thing is to get a first draft that's far enough along that when you bring your collaborators together, there's something to work on.

Gather your squad and review. Select a few important people to help wordsmith the first draft. It's ideal if you can include cross functional collaborators, senior enough that they'll ultimately be on the final approval list. Set the stage with your group that this is the first draft. It's a safe space to give really candid feedback. (Sidenote: Set your own expectations and mentally prepare if you're not super comfortable getting constructive feedback). You all have to LOVE the finished product, and it's going to take work on everyone's part to get there.

Edit, review, edit, review. You don't need to include every member of your initial review group in every edit pass. But keep pushing until everyone can feel great about the messaging. This is really important! It's the only way you'll be able to stick to your guns and enforce the locked approval for the shelf life of your final framework. It's helpful to keep remembering the intended use for this document as you're editing. If you have a growing sales organization, it will be super helpful to be able to hand a new hire this framework to get them up to speed. If you need help building a content calendar, you can use this framework as a basis for your content matrix to figure out where you have gaps in your existing content.

Approval. The approval list will depend on your organization, but you need to make sure to include anyone in leadership who is interested in the final sign-off of your finished product. Here's where you need to work with your champions in the C-Suite to get buy-in from groups that you have less experience working with. Be sure to include a pre-read that reestablishes the point of the document, its intended use, shelf life, and that by signing off on this copy, it's approved to be copied and pasted and used, as written, in marketing materials.

Just Remember:

- The individual components of your own MPF depend on your company stage, competitive landscape, and offerings. Embrace your unique style.
- Don't worry too much about getting your MPF perfect at the start. It's a living document. It can be altered and updated as you learn from your work out in the world.
- Crystalizing exceptional messaging is a skill that you need to develop and practice. And, it's incredibly difficult to do, if you do it right. Keep at it.
- Aligning stakeholders to buy-in to the endeavor is a skill in influence and alignment that doesn't come naturally to most people. Find allies, stay positive and relentless, and keep at it until you can say you LOVE the messaging.

Templates for Building Your MPF

Our template includes various copy blocks that make up your Framework. Take them on one at a time and evaluate what messaging you'll need for your brand and build from there. You'll have something awesome before you know it.

Here are some examples to get you thinking about how the various copy blocks can work. These companies are all a bit different so you'll get to hear different styles and voices to inspire your own writing process.

#1: INTERNAL BACKGROUND

The background section is just for you and your teammates. It's for internal use only. It helps set the stage for the team to work together and articulates your best understanding of the reality you live in. This reality includes the problems you are trying to solve. Keep in mind, the specific language in this section is less important than the sentiment since it won't ever be copied verbatim to customer-facing materials.

Remember, this section is NOT about you. It's about the world you're selling into. Work hard to keep your solution out of this section. It's about your prospects and their reality.

Market Landscape: Give a three to five-sentence overview of the marketplace. This is to help your internal stakeholders align on what the overall industry trends are that are driving your company's strategic direction.

Customer Need: Articulate what consumers need. Not what they need from YOU, but what they need in response to the market landscape above. Again, this is never for external use. It's just to help set the stage for your messaging and help your team align on what the customer needs.

EXAMPLES

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MARKET LANDSCAPE (internal)	The shift to a distributed workforce is well underway, a trend that the COVID-19 pandemic has only accelerated. Across the board, team members want a workplace culture that's inspiring, engaging, and uplifting; yet teams are struggling to build personal connections given the constraints of digital relationship-building. Zoom fatigue causes legitimate disconnection, and always-on messaging apps like Slack and Teams are exhausting; it's easy to misinterpret tone and intention, and for genuine trust, compassion, and curiosity to fall flat. The combination is eroding efficiency and connection among colleagues. Creating a team connection that's alive, vibrant, and doesn't require yet another boring video call is increasingly essential for employee attraction and retention in a hot job market where location is becoming inconsequential. Enabling authentic relationships among individuals as the workplace becomes more and more dispersed will be a winning differentiator in the immediate future and for years to come.
CUSTOMER NEED (internal)	Companies need a scalable way to build authentic, meaningful, communication and connections among dispersed team members, while fostering inclusion, flexibility, and productivity. They need a way to replace the organic, spontaneous "water cooler" interactions when a traditional office setting is not forcing physical interactions. Additionally, attracting premium talent is the arms race of this decade, and companies need to be able to create a differentiating culture that attracts and retains the right people. Additionally, many companies in the current era are experiencing a work from home environment that feels stagnant and drained, and would benefit from experiences that provide energy, novelty, and excitement for the team.

#2: BRAND LANGUAGE

This section gets to the heart of who you are, what you believe, and why you exist as a company. What kind of words resonate with you? What's your vision for your company long-term? The results can be aspirational but they need to be achievable and mostly consistent with your service delivery.

Brand Sentiments: What are the statements you can make around what you believe? Make a list here and start the statements with phrases like: "We believe..." "We strive..." "We understand..." and "We know..." These are the things your company's employees rally behind.

Brand Attributes: What are some words you'd use to describe your brand? What are the words you hope people will use to describe your brand?

Company Mission: Your mission informs your vision of how you'll change the world as a company. It's your biggest of big statements. It's why you exist and what you aspire to achieve. Here are some recognizable examples:

> ***Tesla:*** *To accelerate the world's transition to sustainable energy.*
>
> ***Google:*** *To organize the world's information and make it universally accessible and useful.*

Company Vision: Your vision is what you are doing today to advance the mission. Here are some recognizable examples from the same companies listed above so you can see the difference between vision and mission.

> ***Tesla:*** *To create the most compelling car company of the 21st century by driving the world's transition to electric vehicles.*
>
> ***Google:*** *To provide access to the world's information in one click.*

Value Statement: Some people call this a tagline, a slogan, or the reply when someone asks what your company does. You don't have to be cute here. Effective and concise beats clever if you're not a household name.

EXAMPLES

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BRAND SENTIMENTS (internal)	**Connection**: We believe the human experience is about connection – to ourselves, to each other, to our community, and to the planet. We believe the right technology can strengthen these connections. **Efficiency:** We believe technology should be easy to use and should streamline our lives. We build systems that allow us to do more with less while creating more space for the people and things that matter most. **Innovation:** We believe we are complex beings living in swiftly evolving systems. We believe that being intentional and thoughtful about ways to innovate and improve on those systems can dramatically impact the quality of our experience within them.
BRAND ATTRIBUTES (internal)	Transformative; Innovative; Meaningful + Magical Experiences; Organic Connections; Concierge; Inclusive; Immersive; Elevated; Edgy; Aggressive
COMPANY MISSION	Enable companies to create culture and connection in a distributed world.
COMPANY VISION	To give the world's leading organizations the ability to curate culture and human connection through immersive and inclusive team experiences through an elegant, customizable VR platform.
VALUE STATEMENT	Bring your team together, despite being worlds apart.

#3: BRAND MESSAGING

These are your elevator pitches in varying lengths. This doesn't need to be clever marketing talk - it needs to clearly communicate what you do. Would your mom understand it? That's the calibration you're looking for here.

We've broken them into 25/50/100 word increments because those are fairly common lengths that you may need for various marketing activities, like conferences or press interviews. These lengths aren't hard and fast. If you go to a lot of trade shows and they always ask for 40 words, then write to that length.

The point is to describe the company with increasing detail as you increase in length. Many times these messaging statements are very similar to start and just expand on as the word count grows.

Every press release ends with a "boiler plate" that's typically around 80 words in length. Make sure to include in those 80 words how to get more information about the company.

EXAMPLES

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25-WORD MESSAGING	[Company] has modernized global shipping logistics using data science, predictive modeling, and machine learning to provide freight forwarders with an accurate feed of arrival data for containers.
50-WORD MESSAGING	[Company] has modernized global shipping logistics using data science, predictive modeling, and machine learning to provide freight forwarders with an accurate feed of arrival data for containers. Forwarders no longer need to manually update and share this information with shippers. The data is hosted in a customizable, API-fed, drag-and-drop, web interface.
100-WORD MESSAGING	[Company] is modernizing global shipping logistics using data science, predictive modeling, and machine learning to provide freight forwarders with accurate arrival data for ocean-going containers. The unmatched ease and accuracy of ETA data from [Company] allows forwarders to eliminate hours spent scraping the web and employing bots to gather data, then manually updating and sharing this information with their clients. Instead, [Company]'s custom algorithm has machines feed much more accurate data into a customizable, drag-and-drop, web interface that can host ETAs for thousands of containers at once. The entire scrape-and-update process is eliminated. Plus, shippers can access the same information the freight forwarders are seeing, improving their ability to plan beyond delivery at port.
80-WORD BOILERPLATE	[Company] provides accurate, easy-to-consume shipping visibility for global freight forwarders and shippers. Based in Seattle, Washington, [Company] uses predictive modeling, machine learning, and data science to accurately assess and display the estimated arrival time of containers en route to any port in the world. Our web application allows users to track thousands of containers in real time with ease on a customizable dashboard, providing every opportunity to smooth out supply chain logistics with planning they can rely on. For more information, visit: https://[Company].com/

#4: VALUE PROPOSITIONS

Your value propositions, or value props as we marketers call them, are the holistic statements of what makes you unique. They are your main differentiators and the big reasons why your clients work with you. They tell the story of why you're interesting to a prospect. These value props are typically presented together, so it's worthwhile to read them all at once to understand the whole story.

Be sure to consider tone here, too. You want to be appealing and interesting. State your value props with confidence and the certainty that you have something that really benefits the market you serve. Be specific.

Here's where you want to consider where you'll be using this language in the short term. It can help make the language real and help you hone in on the right tone and voice faster in your creation process.

Value Prop: A value prop is something you do differently. You'll likely choose three, but you may have more or less.

Value Prop Statement: Here's where you describe what that value prop means. Think about the impact you're making on a customer's life. Keep asking yourself "and" or "so what." Get this one right because you'll be copying and pasting it a lot.

EXAMPLES

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VALUE PROP	PERSONAL RELATIONSHIPS, FOR GENERATIONS TO COME	PLANNING THAT STARTS WITH "WHY?"	EXPERTISE FOR EVERY PART OF YOUR LIFE
VALUE PROP STATEMENT	There's nothing more personal than your financial well-being and we aspire to cultivate close, lifetime relationships with every one of our clients. As your needs change over the years, you can expect seamless advice and support from our multi-generational team — so you're always working with a trusted, friendly face. We've done the hard work of building a talented group of financial experts to help you and your family, today and for the generations to come.	Lifetime financial security and well-being isn't covered in one checklist. It's planned through a long term partnership that's constantly talking about the "why." At [Company], we're focused on delivering recommendations that align with your individual values, goals, and circumstances. Our job is to have the crucial conversations with you now that lead to your success later – whatever that looks like to you. As fiduciaries, we are committed to not only providing sound counsel, but we're dedicated to making sure you understand the "why."	[Company] has meticulously built a team of best-in-class experts who we know you'll love working with. In addition to the [Company] advisors you have already come to trust, we're constantly growing the team to add expertise and perspective that caters to your lifetime portfolio needs. Whether you're ready to build a strategy for your first investment portfolio, leave a legacy through charitable giving, or need advice on setting up a trust, our collaborative, multi-generational team approach ensures that your financial well-being will have the exceptional support it deserves, for decades to come.

#5: KEY FEATURES

Key features describe how your clients "work" with you. They are specific attributes that you do particularly well. It's worth noticing that while it's a good idea to have three value props, since there is more power in three's psychologically, you can have many features. Don't create so many that they end up being diluted down. Generally, somewhere between three and seven is great.

Key Feature: A key feature describes an essential benefit you offer your clients.

Key Feature Statement: Describe, in terms of value, why that feature is important.

EXAMPLES

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KEY FEATURES	A TEAM APPROACH TO PORTFOLIO DEVELOPMENT	COMPREHENSIVE WEALTH MANAGEMENT SERVICES FROM A NAME YOU CAN TRUST	ORGANIZATIONAL GROWTH WITH HOLISTIC CLIENT SUPPORT IN MIND
KEY FEATURE STATEMENT	To support your portfolio for life, [Company] continuously "builds their bench" – recruiting and working side-by-side with the best up-and-coming talent. This ensures seamless transitions and a team of trusted partners for decades to come.	From investment and advisory services, to estate and retirement planning, to retirement income and tax strategies, [Company's] team delivers fiduciary relationships that give clients peace of mind and financial well-being.	[Company] has clients located across the country, with offices in Bellevue and Seattle, WA, and Gilbert and Phoenix, AZ, offering financial services for individuals and businesses.

Buyer Personas

One of the infrastructure essentials we advocate hard for here at Wheels Up is a full set of buyer personas. Not only do they align messaging, they are a blueprint for content delivery and campaign strategy. You can easily spend upwards of tens of thousands of dollars developing each persona if you do them right with extensive in-person interviews and focus groups. But for the vast majority of our clients, a full blown, research-backed persona library isn't practical – or really even necessary.

Between the tribal knowledge of your team (product, marketing, and sales) and some time spent researching your market, you can build a robust-enough persona in a handful of hours.

What's a Persona?

It's a caricaturization of a buyer, typically stereotyped by role. Personas paint a picture of what makes each typical buyer tick - what motivates them, who they report to, what media they consume, and more. Many personas are given fictional names and backstories to help really humanize the target. I've even seen life-size posters of stock art actors on office walls to help bring these profiles to life and keep them front and center (literally and figuratively) in the organization's marketing efforts.

Why Do Personas Matter?

Here are five compelling reasons why building personas will help you hit your marketing and sales numbers.

Campaign precision. Personas bring focus to your sales and marketing efforts. Instead of launching campaigns that change from moment to moment, you can align content and messaging that will resonate with individual personas, helping usher them through the funnel faster and with less noise.

Sales focus. Think of these personas as blueprints for your sellers. As they build their target lists, they can align individuals to their respective personas to quickly inform the basis of their outreach. By knowing what keeps a prospect up at night, or how their success is measured, your sales person is already a step ahead in making sure an opener actually works.

Marketing planning. While many persona templates stop with the individual's profile, we advocate for extending personas to align with the buyer's journey stages, spelling out what's important at each conversion point. We'll cover this process in detail in this paper. But, here is a summary of personas' role in planning.

I recommend going the extra step to align each persona with a messaging and positioning framework to spell out what it is about a product or solution that is particularly relevant. With these two extra sections, you can pretty quickly build a content matrix to identify what assets you'll need in order to effectively nurture buyers through the funnel. This lays the groundwork for your editorial calendar, and it also can help you right-size your marketing investment.

We believe that the best campaigns are anchored in great content, and if you have gaping holes in your content matrix, then you're going to be scrambling each time you want to launch a new campaign. On the flip side, if you are a startup just building your marketing strategy and you don't have a fully staffed sales organization, you might not really need spend a ton of time and money building out bottom-of-the-funnel, sales-friendly assets right away since you're not going to use them in campaigns for a few months.

Customer-centricity. If you're really good at integrating your personas into your sales and marketing vernacular, it's impossible to not constantly think about your buyers (and eventual customers). Give your personas memorable names and creative backstories. Really bring them to life so your marketing is targeting actual people, not just contacts in your database.

Internal alignment. The work you do to create a set of buyer personas reverberates through an entire organization. It helps connect the dots between product development, sales, marketing, and support, and gives you a common language when organizing cross functional work.

If you have any retention or expansion growth aspirations, you likely have a customer marketing strategy. If that's the case, you'll want to build user and customer personas, too. (Note that your users aren't always your customers - so sometimes these will be different personas!) If you're doing a great job marketing, all your potential buyers will turn into customers, and with your users you'll already have a head start.

Frequently, your product team will develop their own user personas, so take the opportunity to work with them on the endeavor to make sure you have a complete library of profiles describing everyone who interacts with your product.

Stay Flexible

Another thought on persona descriptions: they are fluid documents. Just because you don't know everything yet, it's still a good idea to start. If you know what information you'd like to have, then it's much easier to gather it.

In the following persona templates, choose the fields that make the most sense for you now and start with those. A little trial-and-error is going to help you decide what information is helpful for your organization. Because, that's the point. Personas should help you sell more. If they're a check-the-box infrastructure asset that is built then collects dust, challenge your team to try again and make them more relevant.

Regardless, we recommend checking in with your personas annually to make sure they are still spot on. A quick interview with a few of your top sellers is usually enough to validate your completed buyer persona messaging.

#1: PERSONA DESCRIPTION

Let's hear all about this persona! Give them a name, describe their motivations, wants, and needs. You can even tell about their frustrations because those may help you create some really powerful content.

Get as specific and accurate as you can. Try this work on your own or do it in a group. Eventually, you'll be shopping these persona descriptions around for feedback. They really benefit from accurate and realistic information. Not every marketing team is going to have a lot of different personas. You may only have one and that's okay. You can always start simply and grow.

Warning: don't make this persona fit what your company needs them to be. You run into trouble if you try to pigeon hole your personas to your solution. Really understand what they need and then decide if you're the right solution for them. You'll waste time, money, and sales cycles if you don't look at them in a clear and honest way.

This card has nothing to do with you as the company. It should apply to any company selling to the same audience.

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GENDER:
M/F (skews F)

AGE:
Adults, generally 35+

BIO:
- Adult healthcare consumer who manages healthcare decisions for a dependent and/or family member ("Patient")
- At least moderately adept with smartphone(s) and other technology
- Comfortable with cloud-based storage, sharing and access of personal healthcare information for person(s) in their care

MOTIVATION:
- Managing healthcare and/or caring for Patient

TRAITS:
- Single/divorced, partnered, married
- Can't be claimed as dependent

ADDITIONAL TRAITS:
- More likely than non-caregivers to seek out information on health care, dependent care, access to medical records/privacy and data sharing
- May (co-)manage healthcare decisions for:
  - dependent child(ren)
  - disabled or elderly parent/spouse/
  - other relative

WANTS/NEEDS:
- To have quick, easy, reliable access to up-to-date, accurate medical information for Patient when and how they need it
- To spend less time facilitating requests between provider and payer/insurer
- Seamless healthcare transactions (reduce/eliminate requests for verification from insurer and/or 3rd party, e.g., FSA administrator)
- Freedom from COVID travel restrictions (for healthy dependent Patient, e.g., child)

SOCIAL NETWORKS:
35-49:
- Instagram
- Twitter
- Facebook
- LinkedIn

50+
- Facebook
- LinkedIn
- Twitter

WHERE THEY GET THEIR INFO:
For health care-specific information in COVID era:
- Healthcare provider, payer/insurer
- Workplace/employer
- Govt websites (CDC, WHO)
- Brick & mortar businesses/retail
- Online:
  - Global/local social media
  - Blogs/message boards
  - Search engines
  - Professional groups (LinkedIn, niche networking groups)
- Friends and family (word of mouth)
- Cable and local news (mostly 55+)

FRUSTRATIONS:
- Managing healthcare records/data for more than one person
- Having to facilitate communications among providers, payers, 3rd parties (FSA administrators) re: diagnostics, paperwork, payment verification, etc.
- Verification process for obtaining healthcare data for Patient (esp. those co-parenting, and/or if not named as primary guardian or caretaker of Patient)
- Rising cost of healthcare; costs associated with requesting healthcare records

#2: PERSONA-ALIGNED VALUE PROPOSITION AND KEY FEATURE MESSAGING

At this point you apply your MPF to your personas. You create a message map for each persona based on what you know about them. Eventually, you'll be running campaigns segmented by persona, so you can use those campaigns as a way to validate, test, and tweak your messaging.

By and large, the value props will be the same for each persona, possibly in a different order or with different supporting language. Key features will definitely reflect the persona uniquely. Likely, you will choose a subset of the features you created above that are relevant to each potential member of your market. This part of the exercise helps you determine how your messaging will change slightly to speak to the different types of buyers you're targeting.

You should not have to rewrite any of your value prop fields, or else you didn't do a thorough enough job while building your value props the first time around. This is a place to make those broad statements particularly relevant to your individual buyer types.

Download template

PERSONA-ALIGNED VALUE PROPOSITION MESSAGING

VALUE PROP 1: **Control**	VALUE PROP 1 STATEMENT: When you're making health decisions for a loved one, [Company product] makes it easier by putting you in control of the patient's health data.
VALUE PROP 2: **Ease of Access**	VALUE PROP 2 STATEMENT: From medical records to test results to insurance information, [Company product] gives you direct access to the information you need, when you need it - saving you time and eliminating costly requests.
VALUE PROP 3: **Safety & Security**	VALUE PROP 3 STATEMENT: Your health data is safe and secure with the [Company product] app. Built on a world-class platform approved by HHS, you share only the information you want and nothing you don't.

PERSONA-ALIGNED KEY FEATURE MESSAGING

KEY FEATURE 1: **Secure, Single Sign On**	KEY FEATURE 1 STATEMENT: Access your [Company product] app from any permissioned device to access your data easily, on the go, for any individual in your family.
KEY FEATURE 2: **Data sync with MyChart**	KEY FEATURE 2 STATEMENT: Your health records will always be current since [Company product] syncs automatically with your MyChart records.
KEY FEATURE 3: **Trusted source**	KEY FEATURE 3 STATEMENT: With [Company product], any health information you share from your personal record will be respected and trusted as accurate and up-to-date.

Buyer's Journey

The buyer's journey is the entire experience a consumer goes through from having a problem (sometimes not consciously!) to discovering and buying a solution from you. The marketing messaging you approach them with in each of the phases is slightly different.

The buyer's journey comes in many forms and can have many phases, but the rudimentary stages are:



AWARENESS STAGE:

The buyer becomes aware that they have a problem.

CONSIDERATION STAGE:

The buyer defines their problem and considers options to solve it.

DECISION STAGE:

The buyer evaluates and decides on the right provider to administer the solution.

The buyer's journey relates to the sales funnel. Your sales funnel starts as a large group of prospects you're targeting with information about your offer. Then, you provide materials and experiences that educate prospects, allowing them to self-select into a group of the most qualified buyers. This delivers the highest quality leads to your sales team.

No matter how many phases you use, it's always a linear process. People may skip a stage but they don't usually go backwards.

At each stage in the process, you'll need to create a set of questions the buyer might ask. For example, an awareness question might be, "How do people usually solve this problem?" Whereas, a decision question might be, "How do these companies' product features compare?"

Mapping out these questions in a linear fashion will guide you. The idea is that you create marketing materials that answer these questions so that by the time the customer is on the phone with a sales person, they are pretty much ready to buy.

Here's a template to help you organize your buyer's journey questions.

EXAMPLE

Download template

Buyer's Journey for Chief of Staff for the Elected Official

Awareness	Consideration	Decision
[Company] exists in this space - there's a better option to my hotline. They solve my noisy citizen problem.	**I'm wasting resources the way I'm currently doing it. Best in class peers do it w/ [Company]**	**(Trial and Demo offering will cover this stage for now)**
Homestead exemption audit is a problem and a costly one in their jurisdiction, how can I quantify the problem?	What goes into a homestead exemption audit/management strategy? What's the cost, effort?	What are the solution choices?
Does my jurisdiction have high-probability indicators? (i.e. great rental market, many out-of-state'ers)	What are we doing in my jurisdiction to manage it now? Do we have a person going through death certificates and AirBnB listings and cross referencing data? Is there a way to automate this and use that staff for something more valuable?	What are my vendor choices?
How big is the problem in my jurisdiction? How many unclaimed constituents do I have that *aren't* getting exemptions who should?	What are other jurisdictions like me doing to address homestead exemptions?	What are the comparative costs?

Content Matrix

Marketing's job is to preemptively deliver content to nurture a person through the buyer's journey. You want to get ahead of their needs and fill in all the gaps in their knowledge, phase by phase.

The content matrix is a grid that matches up the phases of the buyer's journey with the content you have (or need to create) to answer each question. It's an audit.

Creating a content matrix requires being formulaic. The content matrix is taking the buyer's questions and mapping them to actual assets. It's a blueprint for the assets you'll need to have in your content library to run effective campaigns. Before you start planning, look through all the existing content you have and see which questions your existing assets already answer. Some of your assets might fit into multiple spots. That's okay. The empty spots in your content matrix let you know what to work on next.

The whole point of this exercise is to construct a very systematic and intentional way of building your content to-do list. Or, as you may call it, your editorial calendar. Start at the Awareness stage and create those missing assets first. Looking at the gaps in your audit will help you realize what bandwidth you're going to need on the team to get your content library ready to support campaigns.

You can build your calendar to deliver assets in a "just in time" way. If you need to, you can kick off campaigns with the top of the funnel assets you have and plan to build the subsequent assets while the campaign is running, publishing them just in time for the next campaign touchpoint.

Download template

Persona: Money Dan (Finance Executive)

Content Library

Published · Scheduled · Gap/idea · Not applicable

Awareness	Consideration	Decision
Am I overspending on my back office processes? • Published blog post: 5 cost savings hiding in your back office • Published Gartner report: How to modernize your back office	**What new solutions are compatible with my existing tech stack?** • Published infographic: Compatibility check list • Scheduled quiz: Guided configuration wizard	**What's the ROI on a new implementation?** • Published web page: ROI calculator to estimate my savings • Scheduled web page: Case study ABC • On-demand webinar: Fireside chat with client ABC
What automation exists to streamline document flow? • ?? • ?? • ??	**How will new automation workflows affect staffing and job descriptions?** • Scheduled white paper: How automation augments your existing staff • ??	**What does the implementation process look like?** • Published blog post: Step-by-step implementation how-to guide • Published explainer video: How it works • N/A, intro call w/ CS
Can I offer an easier, more secure customer experience? • Blog post idea: 3 ways to delight your clients this year • Webinar idea: Money Dan Q&A on how to win with a better customer experience	**What are my best in class peers doing?** • Published blog post: 3 examples of peers leveraging automation • Published web page: Case study XYZ • Scheduled web page: Case study ABC • On-demand webinar: Fireside chat with client ABC • Published Gartner report: Magic Quadrant	**How much will it cost?** • Published web page: Pricing • N/A, handled by sales

Building Your Editorial and Campaign Calendar

Everything you've done up until this point has prepared you for the great moment: creating your campaign and editorial calendars. We're finally ready to cascade what you've learned from your content matrix into actual campaigns, and then schedule out the product work needed to launch.

This is where you need to be aligned at the hip with your company's high level business goals. Where is revenue projected to come from this quarter? Do you have products or features that are launching and your sellers have quotas to hit? Is your Partner team launching into a new vertical? Stay laser focused on the high level outcomes that are important to the success of the business as you're crafting your campaign calendar. Align with revenue and you can never go wrong.

Start to build your campaigns based on a persona, following their buyer's journey. You can look at your content matrix to determine what value props and key features to bring into your campaign, and when. And the matrix will show you which assets to include in your campaign or identify what's missing in order for the campaign messaging to land.

By taking this very strategic, persona-driven, stage-by-stage approach to your content production, you're not just shooting from the hip. You're not writing about what you think will be interesting. You're creating the pieces you need to push clients through the funnel faster. You're creating content that will drive better conversion rates and increase the speed that prospects get through the sales cycle, (i.e. funnel velocity).

CONTENT TYPES AND OPPORTUNITIES

Campaigns have different pacing and styles. You may have campaigns that serve up a regular drumbeat of what we call "evergreen" content that tells your more essential messages over and over again. These ideas never fade. They're evergreen! They're constantly targeting new, top-of-the-funnel prospects and pulling them into your prospect pool. You'll also want to mix in some more topical material, such as tying your product to a trade show you're attending, or newsworthy event. Here are some categories of campaigns to help you think about that mixing and mingling process.

Regular Campaign

These are your persona-based "always on" campaigns. You can likely build these once and keep them turned on for quarters or even years with minimal edits. The contacts that end up in these campaigns are typically unaware of who you are. They come from SEM ads, event attendee lists, organic social, and press coverage. Particularly if you have a marketing automation tool like Marketo or Hubspot, they are your bread and butter campaigns that nurture your known ideal customers through the funnel, qualifying them a little bit along the way until they are ready for a sales conversation.

Scheduled Campaign

Product launches, seasonal specials, event announcements, growth milestone press releases – you know about these things far enough in advance to build a campaign plan that takes advantage of multiple distribution channels. Typically these content pieces require substantial cross functional approval, so get them on the radar sooner rather than later.

Opportunistic Campaign

You sell vaccines and we're in the middle of a pandemic. Or, legislation just passed that makes your service hot. These are all examples of times when you may want to spin up on-time, opportunistic content. Reserve bandwidth in your content plan to quickly handle these.

Many people like to use the analogy of the jar filled with rocks, pebbles, and sand to describe a campaign calendar. Your rocks go into the jar first and are the big pieces that are foundational and consistent - these are your Regular Campaigns. They are your main demand generation drivers - the workhorses of your marketing machine. They consistently churn out qualified prospects for your sales organization to close. Particularly in the B2B world, once you've got them dialed in, these campaigns are fairly reliable. You can forecast your sales capacity based on how well funded these campaigns are.

Next into the jar are your pebbles, or Scheduled Campaigns. You don't always see these coming a year in advance, but they still take up a lot of room in the jar. Maybe they last a quarter each, and likely target existing contacts in your database. They are a little extra juice to push prospects through the funnel faster.

Lastly, the sand fills up the gaps in the jar. Your Opportunistic Campaigns are usually last minute, and you tackle them with the bandwidth you have at the time.

Thinking about your campaigns this way helps you prioritize the energy you spend on your campaign content to make sure you're doing the most impactful things first. Your campaigns are going to take all the work you did with your Buyer Journey and Content Matrix and turn it into actual marketing programs.

There's tons of data on what types of content to plug into different campaigns at different stages of the funnel. In my experience, it's less about if it's an ebook or infographic or webinar and more about if the information is proactively answering the right questions. Every business is different. Gather whatever data you can on asset consumption and build your own best practices.

And, you don't have to recreate the wheel with every campaign. Start with the content pieces you already have and keep an eye on where prospects get stuck in your campaigns. Do the investigative work to figure out why prospects aren't continuing to advance through the campaign. Do you have the wrong CTA, headline, asset, or channel? Or, have you made incorrect assumptions about the buyer journey? Is the premise correct but the messaging is just a bit off?

Remember

One of the best things about marketing campaigns is their ability to help you do research. Make sure you're taking the time to listen to what the data is telling you to learn more about your prospects and market.

START BUILDING CAMPAIGNS

With that, let's start creating full-funnel, persona-based campaigns for all that great content you are building. Not sure where to start first? You guessed it - talk to the sales team and find out where they see the biggest opportunity for impact.

Here's a campaign overview that uses our standard template as an example to get you started:

Download template

CAMPAIGN NAME: Q1 CMO Evergreen Awareness

DEMAND GENERATION GOAL: capture new, opted in, on-target leads

DATES: Q1 and Q2 2022

PERSONA: Chief Medical Officer Dan

BUYER JOURNEY STAGE: Awareness

JOURNEY QUESTION(S) TO ANSWER: Do I have X problem? How much is X problem costing me? Is there a better way to deal with X problem than my current solution?

AUDIENCE: net new

ANCHOR ASSET	**TITLE:** The New EHR Tech Stack and How Industry Leaders [Customer names] Are Changing the Game **FORMAT:** webinar **SEO KEYWORDS**: EHR technology, health data outcomes, informatics for CMOs **MESSAGING THEMES:** The industry has changed drastically over the past two years thanks to digital acceleration caused by COVID. There's a new stack of tech solutions to help hospitals provide better patient care while streamlining workflows and reducing staff fatigue.
DERIVATIVE ASSETS	1. Blog post 2. 3 months of organic social promoting on-demand webinar 3. Landing page 4. LinkedIn article - webinar recap 5. Infographics: 5 things we learned from [customer name] 6. 3 x 90 second sound bite clips that align to value props for sellers' email

DISTRIBUTION CHANNELS	**OWNED:** email to opted-in, on-target contacts; company website; newsletter; social; in-app messaging; SDR calldowns to high value prospects **PAID:** LinkedIn ads; promotion on industry org newsletter **PARTNER/SYNDICATED:** customer's internal comms team - email, social, website **BUDGET:** $1,000 promoting live event; $1,500/mo promoting on-demand video
SALES ENABLEMENT	**ASSETS:** pre-webinar personalized, email sent via SFDC to seller's on-target contacts **TRAINING SCHEDULE:** webinar overview in Q1 Sales Kickoff meeting

That's just a sample, but hopefully it gets you thinking about all the pieces that can fit together into a campaign. Try to go beyond the three-touch email campaign and keep a running mental list of all the distribution channels you have access to – it'll evolve as you work with different partners, customers, and industry associations and media outlets. It'll also change as your marketing tech stack changes and marketing tools evolve, in general. We call these your "megaphones."

Remember, everyone likes to consume content differently, so you need to get the same message out via as many channels as you can. Plus, people typically need to see a message multiple times before they act. Using a surround sound approach to your campaign building is a good way to get as many on-target impressions as possible.

As you build your campaign and editorial calendars, remember that campaigns are the ideas you're putting out into the world and a rough idea of when they're needed. The editorial calendar breaks down the day-to-day, week-to-week content production process needed to fill and complete those campaigns.

Where will you host these calendars? That's up to you. Your teammates will want to be either involved or at least able to view the calendar so Excel, stickies, or Trello all work. Simply pick a tool that fits your style and stick to it.

Making Sure You Finish the Work

Congrats! You're well on your way to a full calendar of content and campaigns that are true revenue drivers. But it's human nature (and startup life in general) to move on to the next thing a bit too quickly. As we've said before, your content investment is one of the largest for your department. Here's where it's worth putting a few checks and balances in place to make sure that you have truly squeezed every bit of value out of every piece. We have two tricks we like to use: our "Definition of Done" and the Distribution Checklist.

CREATE YOUR "DEFINITION OF DONE"

This list standardizes the final steps for each and every piece of content that your team creates. Templatizing it not only helps you avoid cutting corners, but it also makes it super easy to incorporate freelancers or new team members – they'll appreciate the clear expectations around how to wrap up a project.

In a fast paced environment, it's so easy to hurry on to the next project and miss critical steps. It's this kind of attention to detail and discipline that turns your marketing organization into a finely tuned machine.

This list will be unique to your organization. But here's a sample "Definition of Done" checklist to help you get started:

Download template

Definition of Done

☐ **1. Copy is approved.**	• Internally: Original requester, CSM/AE associated with the customer, managing editor, management, leadership • Externally: Customer stakeholders, when applicable. Cover your bases here and make sure there are no stakeholders upstream of your contact and who require sign-off.
☐ **2. Design is complete.**	• Proof for typos, orphans/widows, wonky design renderings, low resolution photos • Check that the links work and point to the right spot • Make sure the design complies with your brand guidelines • Make sure the design is approved by necessary stakeholders/owners

☐ **3. Asset is packaged for internal distribution.**	• Include an asset brief cover sheet that includes the following
	  • Sales-ready copy: 2-3 sentences about why this story matters
	  • Ideal asset audience: Who will get the most out of this content, by persona if you have them
	  • List of products or solutions featured in this asset
	  • Brief description of customer involved, if any
	  • The final, approved asset
	  • Pre-written social media posts that can be copied and pasted on others' channels. Include posts for popular platforms, even if you don't have a corporate account. Make sure to tweak the copy so it reads right coming from a stakeholder, not the corporate account. Be sure to include a mention of your company. Also include UTMs for posts, as it aligns with your measurement and analytics strategy.
	  • Include 3 tweets, 1 LinkedIn post, 2 Facebook posts, 2 Instagram posts

☐ **4. Asset is published.**	• In the stakeholder's hands, internal owner notified
	• Published to external destinations as outlined in strategy: blog post, landing page, social, etc.
	• Internal communication is complete as outlined above, with links to live assets
	• Published to internal teams and tools -
	  • Sales enablement portal, PR team, product team for customer intel purposes, Slack channels, or other
	  • Internal communication channels

☐ **5. Explore syndication channels.**	• Develop your paid and organic syndication strategy ahead of time. Make sure that paid syndication aligns with organic activity. • Nurture relationships with the most relevant outlets, even if they don't pick up every piece. This is the long game and will depend heavily on you to produce exceptional content that their audience wants.

CREATE YOUR OWN DISTRIBUTION CHECKLIST

At this point, you've given way too much time, effort, and love to your new content assets to only use them once! Now take an extra step to think about reuse opportunities to not only help squeeze value out of the investment, but also deliver more impressions and increase frequency by placing similar content in multiple channels.

Remember your megaphones? Here's where you make a plan to use what you've got:

Download template

REPACKAGE OPTIONS:

- ☐ Video, in multiple lengths
- ☐ Infographics
- ☐ Website assets: Blog, hero image, case study, testimonial pull quote
- ☐ Sales assets: Slideware, leave-behind sheets, email content
- ☐ Webinar
- ☐ Social media images: Set up Canva templates so it's easy to quickly create these
- ☐ Press release
- ☐ Podcast

DISTRIBUTION OPTIONS:

- ☐ Your website: Blog post, stand alone page (case study, customer spotlight, etc.), hero image, evidence sliders
- ☐ Social media channels: Corporate, employee, industry associations, influencers/advocates, partner clients
- ☐ Paid social campaigns
- ☐ Campaigns: What current or future marketing campaigns can this story help?
- ☐ Podcast channels

SYNDICATION OPTIONS:

- ☐ Press outreach and story pitching
- ☐ Medium
- ☐ Industry associations: Can you be a recurring guest blogger?
- ☐ Industry news outlets: Can you secure a recurring feature?
- ☐ Relevant clients' marketing efforts: Make sure your marketing team is building great relationships with your ideal customers
- ☐ Contributing author opportunities, like HuffPo, Forbes, etc.

LAST ADVICE FOR BUILDING YOUR CONTENT

First, congrats on getting this far in your strategy. Building inspiring content is hard. But when you build it using intention, diligence, data, and a little bit of grit, you know it's going to make a big difference. Way to go, strategist!

Here are the things we are constantly telling each other at Wheels Up. Kind of our Guiding Content Principles:

- Offer valuable content. Sub-par content is, at best, ignored (spam). At worst, you lose credibility.
- Demand RELEVANCY. Send the right message to the right person at the right time.
- There's no magic tool or template. Find a system that works and stick to it.
- KISS (Keep it simple, Smartie!) Remember, attention spans are short.
- Figure out what you can measure and be vigilant.
- Test → Learn→ Improve → Repeat
- Align to the sales funnel and you can't go wrong.

And my last bit of food for thought: as we've said, marketing's job is to try to answer as many questions for potential customers as possible so we can deliver fully qualified prospects to sales. In a perfect world, we leave sales to simply do the paperwork. Sales teams are expensive headcount and time kills deals. Marketing's goal should always be to qualify and prepare buyers, at scale, who fly through the actual "sales" process. We need to make sales easy.

Keep on moving forward with your content strategy with that goal always in mind. Align to the sales funnel and you can't go wrong! Good luck and all the best!

RESOURCES FOR BUILDING YOUR CONTENT STRATEGY

Templates of all the assets listed above are available on Google Docs.

View or download templates

We hope they get you off to a great start with your content ambitions! And if you need a little extra help, we'd love to chat. Reach out to Wheels Up Collective for a free marketing strategy assessment anytime.

Wheels Up COLLECTIVE

About Wheels Up Collective

Wheels Up Collective is a boutique agency helping small, medium, and startup tech companies drive growth through strategic marketing. Whether building your first strategy or complimenting the team you already have with instant, on-demand bandwidth, Wheels Up is able to deliver results faster than the traditional agency model - typically for a fraction of the cost. For more information, visit wheelsupcollective.com, or find us on LinkedIn.