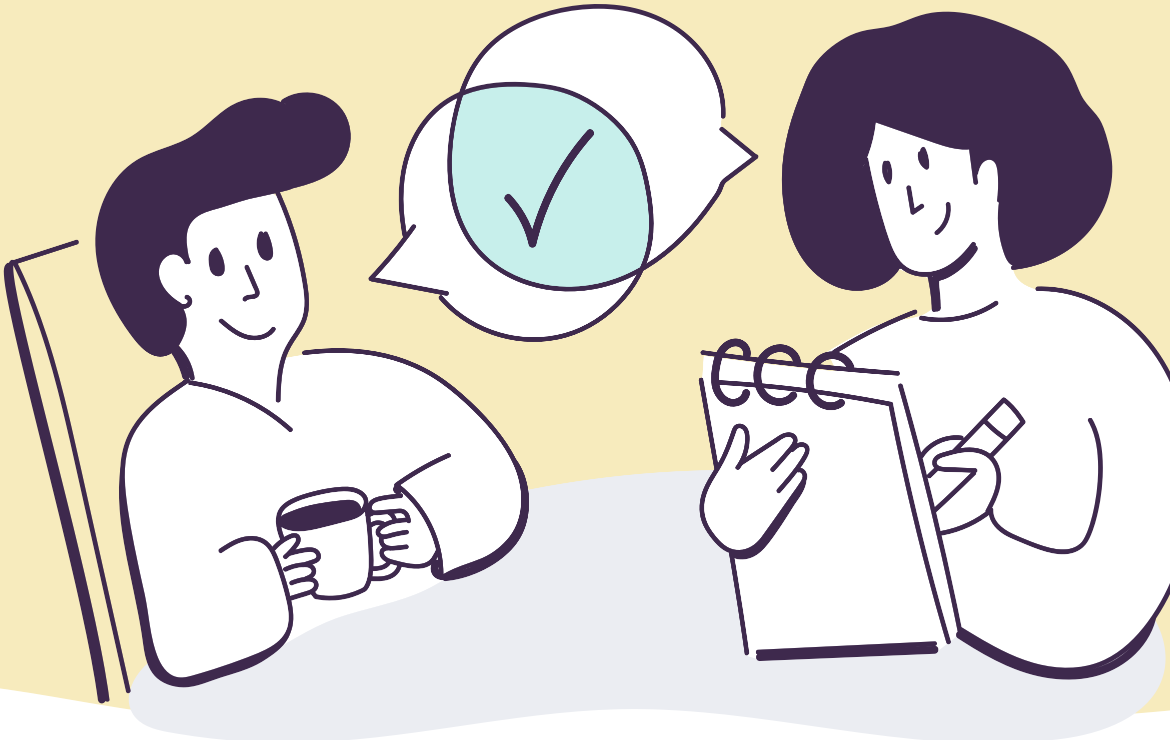

How To

Onboard New Marketing Clients So They Stick Around

Must-ask questions for a long-lasting and rewarding agency-client relationship

gain

This guide provides a checklist you can use to onboard marketing clients with ease.

It was written by the team at Gain – one tool to work, collaborate, and get all your marketing content approved quickly and seamlessly. You can learn more at gainapp.com

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Clients are generally eager to get content online as quickly as possible. While this is a wonderful energy, it's both appropriate and necessary to take a step back, and prioritize the development and fine-tuning of a content marketing strategy.

Begin with fact-finding, and to simplify that process, consider sending a checklist to your client like the one below. Ideally, a client should be able to answer at least these questions before the process of developing a content strategy can begin. It also helps to shape the content plan and keep your team on track. Here's how to get started.

Identify Your Buyer Persona

Who is the buyer persona?

- [ ] What are their demographic characteristics?
- [ ] Which industries do they work in?
- [ ] What size company do they work for?
- [ ] What is their role or title?

What does the buyer persona do online?

- [ ] What social networks do they use?
- [ ] What do they read online?
- [ ] What associations do they belong to?
- [ ] What groups are they in online?
- [ ] Where do they make purchases online? How often?

What are the challenges and opportunities of the target market?

- [ ] What is a typical day like for them?
- [ ] What is their primary objective or goal as it relates to your product/service?
- [ ] What stands in their way of meeting these goals and objectives?
- [ ] What are the typical challenges they face as it pertains to your product/service?

If you're working with startups or young companies, it's entirely possible that they haven't paused to develop or collect this information together, so this is an extremely beneficial exercise for them, organizationally. And how can you start a content marketing plan if you don't know who to target?

Don't accept vague or broad answers from clients when it comes to the target market. "Anyone in technology" is not an acceptable answer, even if their product can be valuable to lots of people who work with tech. If you target everyone, you ultimately reach no one because there's nothing differentiating you or helping you to stand out. A product differentiates itself by pledging to solve a specific problem, so make sure the client has a narrowed-down vision of the buyer persona.

Once you've established who you're targeting, it's time to dedicate some bandwidth to understanding their online behaviors. This data is vital to developing a content strategy and getting your content in front of the right people by publishing and distributing effectively.

As a rule, content always provides value to the reader. You need to know what their pain points are so that they can be addressed by compelling brand material, whether it's on social media, in videos or in blog posts, emails, ad campaigns, and so on. This laser-focus on providing value will be key to getting your content read.

Messaging / Value Proposition

What value do they offer the target market?

- [ ] What is your product? (1-2 sentence response)
- [ ] Why would a customer be motivated to buy your product?
- [ ] What is the vision for your business?
- [ ] What is the unique value your product offers?
- [ ] What is the price/value ratio?
- [ ] What problems motivate the buying decision?
- [ ] What specific outcomes is the buyer persona seeking when they buy your product?

The client vs competitors

- [ ] How do you compare to the competition?
- [ ] What does the competition lack that you offer customers?
- [ ] What features of your product make the competition the most nervous?

Messaging can get tricky if your client struggles to describe the value they bring to the table in a single sentence. Sometimes clients get so caught up in the technical side of their product that they forget that they really need to state the value it provides first. You can help your client narrow this down, but before launching a content plan, it’s vital to organize the core messaging.

Goals

What are your goals for your content marketing efforts?

- [ ] Provide numeric goals for the content marketing campaign (stay away from “increase traffic,” or “get more leads.”)
- [ ] What do you want to accomplish in the next six months? In the next year?
- [ ] What metrics are most important to the team?

How will we measure these goals?

- [ ] Which best practices align with each goal?
- [ ] How can we accurately measure each goal?
- [ ] How do you prefer reporting (monthly report, monthly call, etc.)?
- [ ] Who needs access to all reporting?

Some of these questions are for the internal marketing team, but it's crucial to establish best practices early on. Assisting your client in providing you access to their analytics and establishing expectations of your monthly report with results, metrics, and next steps is a great way to start the campaign off on the right foot. Also, getting clients to tell you goals beyond "to be the biggest company in X industry," can help narrow down campaign tactics and keep both teams on track when it comes to determining campaign success.

Content Audit

What types of content do we need?

- [ ] What are the target market's pain points, and how can we create content that addresses them?
- [ ] What content length performs the best?
- [ ] What type of content does the competition produce? Specifically, what do they do well?
- [ ] What kind of content does the sales team need to nurture leads?
- [ ] How can content help push prospects down the sales funnel?

What content performed the best and worst so far?

- [ ] Using analytics, what are the most popular posts and what does this content have in common?
- [ ] What are the posts that received the least amount of reads and what does that content have in common?
- [ ] What content brought in the most conversions?

If your client already has published content, audit what worked and what didn't. A simple assessment can also help you determine whether or not your client knows how to measure a content marketing campaign and if they have the right analytical tools in place. For clients that are starting from nothing and just launching a content marketing plan, take a look at the competition. Try to assess where competitors excel at content marketing and any gaps in their campaigns.

Style and Tone

What voice/tone resonates with the target audience?

- [ ] Does the target audience prefer the third person or second person?
- [ ] Should the voice be laid back, use humor, or be serious/ informative?
- [ ] What level of technical expertise does the target audience have (for example, should we explain basic concepts or assume a high level of knowledge?)

Do you have documented brand and style guidelines?

- [ ] What style guidelines should we use, including spellings (AP style, etc.)?
- [ ] Do you have a reference document that we can refer to when creating content?
- [ ] Do you need us to create this document to have on-hand?

Clients can usually answer this if they have already published content. It’s helpful to know if a more formal, academic approach or lighter, humor-based approach works better with their target audience. This information may also come to light if your client has a robust buyer persona.

You may find your team rewriting content unnecessarily if you don't ask your client for a style guideline upfront. Maybe they used another marketing agency in the past and want to stick with the same style guidelines, or maybe they have preferences on grammar choices. Ask this first, so you don't have to rewrite later. Also, this should be documented so if the client doesn't have this on-hand, it's another task for your team.

Team Members

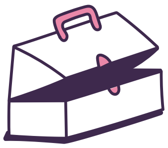
Who are the key team members?

- [ ] Who should we contact for day-to-day questions?
- [ ] Who is the sales point of contact (if writing sales materials)?
- [ ] Who should we copy on all content-related emails?
- [ ] If we have an emergency, who do we contact and how?

What is the content approval process?

- [ ] Who needs to approve what content (blog articles, social media posts, etc.)?
- [ ] How long will each person need to approve content and when is it appropriate to follow up?
- [ ] Who needs to approve any strategy or campaign changes?

If you write a blog post, how many people have to review it and in what order? Who approves social media content and how quickly? Especially for new clients, if this isn't discussed, you may find yourself with 15 people reviewing one piece of content. Therefore, it's important to have a content approval process in place.



Tool Stack

Project management

- [ ] What project management tool will we use? Does your team actively use this?
- [ ] What daily communication tool will we use (if different from above)? Slack, email, etc.?
- [ ] Who will we report to?

Automation tools

- [ ] Which marketing processes have you already automated? If none, ask:
    - Which marketing tasks are the most time-consuming?
- [ ] Do you have a content approval process in place? If not, ask:
    - Who needs to approve content and when?
    - Can content be auto-scheduled or published once we have approval?
- [ ] What content automation tools do you use? If none, ask:
    - Can we recommend tools and onboard your team?
    - Do you have specific requirements when considering a new tool?

Analytics

- [ ] Do you have analytics set up?
- [ ] Do you have website conversions set up in Google Analytics? Do you have a person on your team to do this?
- [ ] What other analytics tools do you use/can you provide us access to?

We're in a technological age where so many processes are automated. Ask your client what they already use and ensure that your team gets access to them. If they don't use anything, introduce a new automation tool from the get-go. Don't get locked into using emails or spreadsheets for anything!

Design Elements

Current design elements

- [ ] What design elements exist, and how can we access them?
- [ ] Do you have an in-house designer? If yes, ask:
    - What is the best way to work with this person on a regular basis?
- [ ] Do you like your current design aesthetic? If not, what do you want to change to reflect your brand better?

Future design elements

- [ ] How can we work with your designer or would you like us to handle design/recommend someone?
- [ ] Who approves design elements?
- [ ] What tools do you use to create and approve design elements?

All marketing campaigns should be paired with strong design elements. Some clients have outdated designs and need marketers to help update them. Make sure to organize this process before starting; otherwise, you'll be midway through a campaign searching for a designer to bring tactics to life.

SEO

What SEO tactics have you implemented so far?

- [ ] Do you have a keyword strategy? What is it? Where does it live?
- [ ] What SEO tools do you use?
- [ ] What SEO tactics have worked so far and what has not worked?
- [ ] Do you optimize each new blog post?
- [ ] Do you currently monitor rankings for specific keywords?

What SEO tactics do you want to try? Are you open to recommendations?

- [ ] If you have not performed any SEO checks, would you like our team to add an SEO audit and recommendations to our campaign?
- [ ] Will we be in charge of optimizing the content and ensuring keywords are being used appropriately?

This question also tests your client’s knowledge of SEO. Have they done keyword research? Do they know where they rank? Do they know where their competitors rank and what keywords they rank well for? You’ll want to know first if the client has any idea on SEO best practices and second what they’ve done, in case you need to fix or update anything.

Starting Off on the Right Foot

Depending on the client, these questions can be condensed and altered, but it’s vital to have all of this information on hand before launching a content marketing campaign. Trying to rush to find these elements will create chaos, and the client’s trust in your team may wane. Figuring out what technologies to use and establishing a clear content approval workflow will also cut down on any stress along the way.

From all of us at Gain,
thanks for reading!

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blog.gainapp.com

Gain is an easy-to-use tool that automates the gathering of feedback and approvals from clients or stakeholders, specifically designed for marketing assets.

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