



Enterprise Content Strategy & Operations Playbook

Portfolio sample. Originally developed for a global enterprise technology organization. Organization-specific names, processes, tools, links, and proprietary information have been removed or generalized

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INTRODUCTION

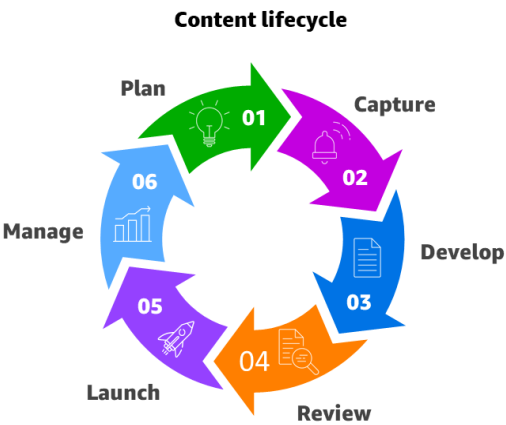
How to use this playbook

This playbook provides a consistent framework for creating high-quality external content. It offers practical guidance and resources for each stage of the content lifecycle, from planning and development through review, publishing, launch, and ongoing management.

Scope

This playbook applies to high-value external content that represents the organization’s messaging and brand at scale. Content may be tailored for specific audiences or customer engagements while maintaining consistent core messaging and brand standards.

Key content assets fall into four categories:



Customer and sales engagement assets	Workshop assets	Thought leadership assets	Opportunity and marketing assets
Executive briefing decks	Anonymized or generic readouts	Blogs	Case studies or customer success Stories
Event decks	Generic examples	Customer or SME interviews	Customer references
	Exercise decks	eBooks	First call decks
	Playbooks	Whitepapers	One-pagers
	Templates		Website copy

Roles and responsibilities

Content development is a collaborative effort. This section defines the key roles and responsibilities involved throughout the content lifecycle, from planning and development through review, publishing, and ongoing management.

All team members	Content team	Leadership team
• Review existing content before creating new content • Submit content requests via the intake process and receive appropriate approvals • Align content you create with go-to-market goals and initiatives • Align content you create with current messaging and branding • Take content you create through the appropriate level of stakeholder, legal, and asset committee review • Act as a subject matter expert for content • Provide feedback on content	• Manage all content processes including the intake, asset review, and audit processes • Create content based on go-to-market goals and initiatives • Ensure content aligns with our messaging and branding as well as organizational style guidelines and legal requirements • Publish content on applicable channels • Ensure content is launched internally to the appropriate audiences • Share content-related updates and resources with team	• Review content prior to asset review meetings and be prepared to share feedback during the meetings • Attend meetings to review content and provide feedback • Agree upon, set, and follow content and review standards for key assets



Getting started

Questions to ask

Before you go too far with your content planning, take time to do your research. Make sure the content you want to develop doesn't already exist. If it does, do you have a fresh or unique take on the topic?

In many cases, you'll need to weave data and customer stories into your content. Do you have this supporting material? If not, you may not have a compelling case to move forward.

Preparation

Great content begins with an understanding of your audience, key messages, and goals. We recommend putting together a content outline, brief, or mental model **before** you start creating content. This approach helps you better organize and share your thinking, and minimizes re-work as you move through the review and approval stages.

In this chapter, we further define the major elements of content development as they relate to creating a content brief.

Content brief components

Audiences

Defining your target audience is an important first step in developing content. When you know your audience, you can tailor your content to their experiences, interests, and challenges.

External audiences

We aim our external content at two groups: business decision makers (BDMs) and technical decision makers (TDMs).

Audience	Common titles	General characteristics	Applicable content assets
BDMs	CEO, COO, CDO, CDAO, CMO, CFO (can include VP levels for these functions as well)	Busy and have little time to digest content Focused on creating business value Driven to put big ideas into motion	Blogs Case studies Customer success stories Executive briefing decks eBooks First call decks One-pagers Website copy Whitepapers
TDMs	CIO, CTO (can include VP levels for these functions as well)	Under pressure to understand and implement technological innovations Must balance technology and data “basics” with the need to innovate	

Internal audiences

Our internal audiences are often the secondary audience for our external content. Whitepapers, first call decks (FCDs), and other key assets help educate our internal audiences and position them to leverage our programs. While internal teams may not be our primary content audience, we need to consider how they'll use our content. As you get further along in content development, you should plan for how you'll share your content internally.

Customer journey

As you define the audience for your content, you should also define their stage in the customer journey. The content you create for executives who are new to the organization's solutions will be different than the content you create for executives who are actively using its solutions.

Key messages

Key messages are the core ideas you want your audience to remember. They help focus your content, establish a clear point of view, and ensure your story reinforces broader organizational messaging.

When planning content, consider two levels of messaging: 1) core organizational messages and 2) content-specific messages. Core messages provide a consistent way to communicate the organization's value and should be incorporated where relevant. Content-specific messages should capture what is unique and important about the individual story.

Keep content-specific key messages clear and concise, ideally one to two sentences. Strong key messages should:

- Give your audience a reason to care
- Communicate the core benefit or value of the approach, program, or service
- Address the needs, challenges, and opportunities of the intended audience
- Reinforce a clear and differentiated point of view

Goals

The ultimate goal of content is to drive meaningful audience and business outcomes. While a single asset may not directly generate a conversion, effective content should move audiences toward a defined next step and contribute to broader business goals. How will the content you're planning accomplish this?

Here are examples of common content-related goals aimed at nurturing an audience:

- Build or grow credibility/trust
- Create brand awareness
- Provide education or insight on a topic, product, or program
- Generate demand and qualified leads
- Drive event attendance
- Support the launch of a new program/product

These goals are high level, but are an introductory point for defining your content goals. Align content goals with broader go-to-market priorities and business objectives to ensure content supports the outcomes that matter most.

As you develop your content goals, follow the SMART format for setting specific, measurable, attainable, relevant, and time-bound goals.

- **Specific goals:** Avoid vague language and use real data. For example, “5% higher engagement” instead of “more engagement.”
- **Measurable goals:** Set goals that can be measured to track progress and determine success. For example, “increase monthly web traffic by 5% within three months.”
- **Attainable goals:** Strike a balance between challenging and realistic goals. Avoid being overly ambitious or too easily attainable.
- **Relevant goals:** Align content goals with overall team and business objectives. Consider how the goal contributes to the organization’s success.
- **Time-bound goals:** Add a time component to make goals actionable and measurable. Set a specific timeframe for achieving the goals.

Call to action

The CTA helps audiences take the next step in their journey and provides a measurable signal of content effectiveness. Select a CTA based on the audience, funnel stage, content goal, and desired next action. CTAs can also include:

- Links to other external content
- Link to our YouTube channel
- Link to sign up for an event
- Information about relevant programs, services, or resources, with links or guidance on the appropriate next step.

Publishing paths

External content may be published across multiple owned and partner channels, including websites, blogs, video platforms, and other digital properties. Each channel has its own publishing requirements and approval process.

Blogs

We can use our website to publish eBooks, customer references, and whitepapers. We can also link to our YouTube channel and other videos. Blog development should align with the appropriate editorial or thought leadership strategy and follow established publishing and review processes. If published, we can then link to the blog from our website.

eBooks and whitepapers

eBooks and whitepapers typically require broader distribution and amplification to maximize their reach. Engage marketing and channel partners early to align the content with relevant campaigns, audiences, and distribution opportunities.

If Marketing does not sign off on your content idea, you may still be able to publish an eBook or whitepaper on the team website. Follow the content intake process to submit your idea for review.

Case studies and customer references

Marketing also oversees the customer case study and reference process. If you have a compelling customer story with a great use case, you can pursue two routes to get it published. The first is a “lightweight” reference or short paragraph with a customer quote. The second is a full one- to two-page case study.

Lightweight references are short reference paragraphs that highlight a customer’s use case and/or product use and include customer quotes. The content team can help you develop a lightweight reference, however, you must have sign off from the account manager **before** the team moves forward. The account manager will need to complete much of the initial work.

Full-length case studies are reserved for customer stories that require in-depth treatment to cover key elements or describe challenges/solutions. These studies require both a marketing sponsor — who can promote the content — and endorsement from the sales team that the story will meet a sales need.

Format

You can create content in a variety of formats that align with our key content assets and standard offerings. The format you choose should be based on your audience, goals, and intended story.

Format type	Description	When to use
Blog	Blogs provide personal accounts of the authors' experiences with the organization's services. They offer in-depth technical content and how-to's, as well as differentiated thought pieces.	You have a differentiated point of view on a topic that helps build thought leadership. Only choose this format if you are willing to work through the appropriate Marketing channels to get your blog published.
Case study	Full-length case studies are reserved for customer stories that require in-depth treatment to cover key elements or describe challenges/solutions.	Only choose this format when you have prior agreement from a marketing sponsor and the sales team.
Customer reference	Lightweight references are short reference paragraphs that highlight a customer's use case and/or product use and include customer quotes.	You have a compelling customer story that can be captured in a short paragraph. Only choose this format when you have prior agreement from the customer and account manager.
eBook	eBooks are digital books that help educate readers. They provide detailed insight on a product, program, or topic, and are designed to generate interest and leads.	You have a differentiated point of view on a topic that helps build thought leadership. Only choose this format if you are willing to submit a content brief or outline.

Format type	Description	When to use
One-pager	One-pagers convey the highlights of a program in a concise and factual manner. They are designed to quickly orient the reader to the value of your program or approach.	You need to create an easily scannable piece of marketing or opportunity collateral. Only choose this format when the collateral aligns with the content intake decision criteria.
Whitepaper	Whitepapers are marketing documents written as authoritative reports to educate and inform potential customers. We create whitepapers to educate our audience about how a program or product will solve a pressing issue.	You have a differentiated point of view on a topic that helps build thought leadership. Only choose this format if you are willing to submit a content brief or outline.



CAPTURE

Content request intake form

We use an intake process for new content requests. This process helps us ensure that any content we create is aligned with our team priorities and goals. It also helps us reduce duplicative work, allocate content resources, and improve content tracking. The content team manages the intake process, including reviewing completed requests and determining next steps.

When to use

The intake process is solely for content that falls within the scope of this playbook. Use it when you have an idea for new, external-facing content and can identify the audience, goals, and key messages for the content.

How to use

Go to the intake form and complete all required fields.

Request Title: Enter a name for your request such as “AI eBook.”

Request Description: Provide information to help the content team better understand your request including why this content request is needed and how the team will use this content. You should also use this field to specify who will be doing the work. Are you submitting this request for work you want to complete or is this a request for the content team?

Requestor Details: Enter your email address.

Target Completion Date: Enter the estimated due date for this content. The content team will work with you to ensure these dates are achievable.

Audience: Select “External.”

Request Type: For this purpose, you would select “Content development.”

Do all new content ideas or requests need to go through the intake process?

If it fits the scope of the playbook – yes. We recognize that some content will not require a full outline or brief. However, in all cases, you should review the decision criteria in this chapter and ensure you can answer “yes” to each question.

Content Category: Select one or multiple options from the following list:

Event

Executive Engagement

Marketing/Opportunity

Thought Leadership

Workshop

For help determining the best category, refer to the Scope overview in this playbook.

Attachments: Attach any files for review and click “Submit.”

Post-submission

Once you submit the form, the content team will review and do one of the following:

- Reach out for more information
- Approve your request and work with you on next steps
- Escalate the request for additional leadership review
- Put your request on hold
- Decline your request

Decision criteria

When evaluating a content request, consider the following questions:

- Does this request align with broader business and content priorities?
- Does the request help us move the needle on those goals and priorities?

- Does this request significantly benefit the customer or end user?
- Does this content already exist in another format? If so, is another version needed?
- Are the appropriate resources and capacity available to support this content?

If you did not include a content outline, brief, or mental model with your request, you may be asked to provide one at the time of review.

Content request and content project tracking

All content submissions are routed to a centralized project tracker to manage requests, monitor progress, and provide visibility into the content pipeline.



DEVELOP

Content development is the most time-consuming stage of the content lifecycle. If you first developed a content brief, or similar prep mechanism, this stage will go more quickly.

While writing approaches may vary by format and audience, all content should align with established editorial, messaging, design, and brand standards.

Organizational style guide

The organizational style guide and editorial style guide each contain a wealth of information to help you create content. These guides are complementary and act as a “how to” for common writing questions related to capitalization and punctuation. These guides also include important insight into how you should write for voice and tone. Here are a few highlights:

- Whenever possible, use the active voice instead of the passive voice.
- Refer to the reader as *you* (second person) and refer to the organization as **we** (first person).
- Avoid technical jargon and insider lingo. Use simple, plain, everyday language. The Product Marketing guide has a list of jargon, clichés, and Latinisms to avoid and alternatives to use.
- Be direct and friendly in your tone. Aim for an overall tone that is informal, informative, and friendly, without getting chatty.
- Avoid excessive words, such as “please.”
- Use lists to break up text.
- Use lowercase for nouns and noun phrases that are not proper nouns, for example big data.

Organizational design guide

The organization also has a design portal to help you with the visual elements of your content. The portal includes font and color guidelines as well as resources for images, illustrations, and templates.

As a general rule, we use the organization's brand templates as a starting point for creating content, especially PowerPoint (PPT) decks. We understand you may need to modify these templates for your specific presentation. However, you should make every effort to use what exists and ensure anything you create aligns with the overall brand. You will save significant time by using what's available to you.

Accessibility and inclusivity

Follow established accessibility and inclusive-content guidelines across formats. Consider readability, typography, layout, visual accessibility, and inclusive language throughout the development process.

Editing

As capacity allows, the content team provides editing assistance for key content assets. To request editing help, use the content intake form and select "Edit" under "Request Type." Before you request editing help, you must **first** take your content through a generative AI tool to check for spelling and grammar, and conduct a general review. The content team will only accept editing requests from those who have taken this initial step.

Generative AI tools

Generative AI models can help you streamline and speed your writing and design process. These models make it possible to create initial drafts or outlines for various types of content, such as articles, blog posts, or scripts. Similarly, they can assist you with ideation and brainstorming by generating ideas, topics, or creative prompts based on your input.

You can also leverage generative AI models to help with editing and rewriting. Some models suggest alternative phrasing, rephrase sentences or paragraphs, or even rewrite entire sections of text in a different style or tone. Or, you can use generative AI to expand on a short prompt, outline, or existing text. This can be useful for adding more details, creating longer narratives, or developing ideas further.

Cautions

When working with these models, it's essential to respect intellectual property rights and avoid generating content or images that infringe on copyright and trademark rights. Do not plagiarize content. You should also be mindful of potential biases or ethical concerns that may arise from the AI model's training data or output. It's important to note that while generative AI can be a powerful writing aid, it should be used as a tool to augment and assist, rather than replace. Human oversight, editing, and refinement are still crucial to ensure the quality, accuracy, and coherence of the final written work.



REVIEW

Review and approval guidelines

As you create content, you should be thinking ahead to the review and approval process. This stage of the content lifecycle is multi-layered and the stage most likely to create roadblocks.

Plan for three potential levels of review: 1) stakeholder and subject matter review, 2) legal and brand review, and 3) final editorial or content governance review.

Content stakeholder review

All content needs stakeholder review. Often, this is your first level of review. Your stakeholders are the people who understand your subject matter and can provide valuable, productive feedback. They often have a vested interest in your content.

You may also have stakeholders who are further removed from the purpose and message of your content. These people tend to be managers and directors who have final sign off on content.

Use the table below as a starting point to identify your stakeholders and the content they need to review and approve. The table is an example only and should be modified to reflect your specific stakeholders.

Type of approval	Content to approve	Approved?	Date approved and by whom
Subject matter expert			
Technical reviewer			
Leadership			
Content team			

Type of approval	Content to approve	Approved?	Date approved and by whom
Product Marketing			
Customer			

Legal and brand review

If your content includes customer, competitive, confidential, or other sensitive information, follow the appropriate legal and brand review process. Consult your organization's legal and brand guidance to determine whether formal review is required and what standards apply.

Use the checklist below to confirm that content meets applicable legal, privacy, brand, and usage requirements. Even when formal legal review is not required, content should still comply with established organizational standards.

To Do	Yes?
Use available legal review guidance and decision criteria to determine whether formal legal review is required.	
Review content to ensure it does not contain confidential, customer-identifiable, personally identifiable, or otherwise sensitive information.	
Confirm that required confidentiality, internal-use, or copyright notices are included where applicable.	
Review and follow current messaging, brand, and editorial standards.	
Confirm that customer, partner, logo, quote, and reference usage has the appropriate approvals and documentation.	

To Do	Yes?
Confirm that partner information and logos are approved for external use and follow applicable usage requirements.	

Asset review committee

We have an asset review committee to evaluate key content assets. This committee reviews completed content and determines next steps related to publishing. The content team manages the overall asset review process.

Asset review qualifications

The asset review committee looks at key content assets only. You should submit any new content to the committee that falls into the scope of this playbook. However, you do **not** need to submit content to the committee if you're working with Marketing, as they have their own processes.

Who's on the asset review committee?

The committee includes the leadership team and content team.

Asset review process

The content team uses an intake form for all asset review committee requests. Use this form to submit the **final** version of your file. The committee doesn't review "in progress" content. If you believe you have an exception, reach out to the content team.

The content team will review your request and get back to you with next steps. If the request falls within the purview of the committee, the content team will give you a date for review. You won't be asked to attend the asset review meeting. The content team will again follow up with you on the committee's feedback. You may be asked to make changes and re-submit your file.



The content you submit to the asset review committee shouldn't be a surprise. You should have previously submitted your idea or request through the content intake form. Taking this initial step ensures we're not wasting resources or duplicating work. It also ensures your content is aligned with the team's greater priorities.

Asset review decision criteria

The asset review committee makes the following determinations for each piece of content:

- Publish
- Revise
- Hold
- Reject

These determinations are based on these criteria:

- Is the content aligned with current organizational messaging, positioning, and brand standards?
- Is the messaging clear, compelling, and consistent?
- Are the images clear, compelling, and consistent?

- Does the content have a clear point of view?

If you did not follow the content intake process, the asset review committee may further evaluate content based on those decision criteria.



PUBLISHING AND LAUNCH

Publishing

Publishing responsibilities vary by channel. Coordinate with the appropriate channel owners early to understand publishing requirements, timelines, approvals, and opportunities for cross-channel amplification.

Internal launch

You'll want to give your published content as much visibility as possible. We recommend putting together a launch plan to ensure you're getting in front of the right audiences. Use the checklist below to help define the major elements of your launch.

To do	Description
Identify your target audiences	What groups would benefit from this content? Be specific to help narrow down email lists and internal channels.
Identify your channels and channel owners	What internal channels can you use to share your content? Review the channel overview to learn more about the channels available to you. Who owns these channels? Once you identify your channels, you'll need to contact the owner to ensure they can share your message. Be mindful of the SLAs and processes for different channels.
Create your content	What format will your content take? You may need to draft email copy, messages, or newsletter blurbs. You should also think about any supporting content your audience may need to help them use this content. For example, if you have created a new executive briefing deck, do you have a recording to accompany it?
Identify your review and approval paths	Who needs to review and approve your content? In addition to the channel owners you identified earlier, you may need to run copy by certain stakeholders, including your manager. This requirement is especially true for mass emails.

To do	Description
Determine your launch dates and workback schedule	When will you launch your content internally? Using your target launch date and feedback from your channel owners, you can work backward to determine when you need to create content and send it for review and approval. Be sure to allow yourself sufficient time for the review and approval process as this step often delays the internal launch.



MANAGEMENT

Content audit

The content team plans for and oversees the content audit process. The audit process serves as a maintenance exercise and helps our team: 1/ evaluate current content and determine its effectiveness, and 2/ identify content gaps. The content team conducts audits on a quarterly or semi-annual basis, depending on the type of content.

Quarterly	Semiannually
Case studies/success stories	Workshop assets
Customer references	Thought leadership pieces
Executive briefing decks	
First call decks	
Website copy	

Audit process and responsibilities

Each content audit encompasses four stages.

Stage 1: Content team review

In this stage, the content team reviews each key asset and looks for anything out of date, unclear, or in general need of improvement. To help with this stage, the team conducts independent research to identify current industry and market trends. They also pull performance data for content, when available. Once the content team completes their initial review, they determine, or make recommendations, for next steps. These next steps are: 1/ revise, 2/ retire, 3/ create new, or 4/ no changes needed.

Stage 2: Leadership/SME review

When the content team determines that a key asset needs a significant update, they engage leadership and/or SMEs for further consultation. These groups review the existing content for messaging and branding, but with a closer eye on relevancy and latest trends. SMEs, especially, look at this content through the lens of their customers to determine its effectiveness. Once these groups review, they determine, or make recommendations, for next steps. Again, these next steps are: 1/ revise, 2/ retire, 3/ create new, or 4/ no changes needed.

Similarly, the content team will engage leadership when they identify an opportunity to create a new version or type of a key content asset. The content team will use the intake request process to further vet these ideas.

Stage 3: Develop and deliver

Based on the outcomes of stages 1 and 2, the content team moves forward to revise or retire existing content, or create a new key content asset. The content team may be fully responsible for this stage or engage with SMEs to complete or assist with the work. In either case, the content team ensures any significant updates or new content goes through the appropriate levels of review and approval. Once content has been finalized and approved, the content team ensures it's published in all appropriate channels.

Stage 4: Communicate and share

The content team shares content updates with the relevant audiences. The content team determines these audiences based on the key content asset and the level of change or launch.

Other content updates

In some cases, content will need to be updated outside of the audit windows. If you identify outdated messaging or branding, use the intake form to notify the content team. Select “Brand update” or “Content update” (or both) under “Request Type” to initiate the process.

If you have an idea for revising content, you should also use the intake form, again selecting “Brand update” or “Content update” (or both). If your request or idea reflects a significant update, you may be asked to walk through the content development process.



RESOURCES

Content planning

Sample content brief

Use the template to work through the core elements of your content.

Component	Description
Goals	How will your content help drive business value for our organization?
Key audience	Is your content for a BDM or TDM audience?
Customer journey stage	Where is your audience on their customer journey with the organization?
Key messages	What are the main takeaways for your content?
CTAs	Where will you direct your audience for more information and to help nurture leads?
Format	What type of content are you creating?
Channel	Where do you want to publish your content?
Data	What data do you have to support your content?

Component	Description
Customer stories	What customer stories support your content?
Timelines	When do you want to launch this content? What is your workback plan?

Internal launch channels

Consider the following internal channels when developing a content launch and amplification plan.

Channel	Purpose	Best used for
Internal knowledge hub	Central repository for approved content	Evergreen resources and enablement
Team communication channel	Rapid team communication	New or updated content
Internal newsletter	Broad organizational awareness	Major launches and thought leadership
Email	Targeted stakeholder communication	Audience-specific launches