COLUMN
FIVE

Content Strategy Toolkit

*Warning: Completing this toolkit within a browser will not allow you to save your work.

Table of Contents

Welcome to your ultimate content strategy toolkit. With these handy templates, we've made it easy to build a complete content strategy from scratch—with a lot less stress.

Before you dive in, we recommend reading our **Guide to Build a Content Strategy**, which includes detailed instructions on how to use each template. Once you've done that, you can work through each item in order, or click on an individual template to jump directly to it.

Content Audit Template

Use this template to identify what your content (and your competitors' content) currently looks like, what's missing, and how you can improve.

For detailed instructions, see our **Guide to Complete a Content Audit**.

Step 1
Gather Content

Whether you're auditing your own content or your competitors' content, you will be looking at a variety of content from five main categories.

1. Brand
Content about a company specifically (not its product), such as its Brand Heart (aka purpose, vision, mission, values), events, news, etc. Some of this content may be internal-facing only; some may be external.

2. Editorial
Content meant to educate, entertain, inspire, or demonstrate brand expertise or thought leadership, such as articles, guest posts, infographics, blogs, industry-related content, etc.

3. Product
Informational content related to products or services, such as sales materials, demos, explainer videos, or educational content.

4. Performance
Tactical content used to drive a specific KPI, such as landing pages, CTAs, PPC, etc.

5. Talent
Content about a company's employer brand, culture, etc.

To audit your own content...
Grab 5-10 pieces of successful content from each category. (Use your analytics to identify successful pieces from the last one or two years.)

To audit your competitors' content...
Decide which categories you want to audit, depending on your content strategy. You may select content from all categories or focus on specific ones (e.g., editorial content over talent content). Either way, gather 5-10 pieces of recent/successful content from preferred categories for your top 3 competitors. (You can audit more competitors, but this is a good place to start.)

Step 2

Audit Your Content

Review content one category at a time, using these questions to document your collective observations.

Questions to Ask	Brand Content	Editorial Content	Product Content
What stage of the buyer journey is it made for?			
What persona does this content speak to?			
Does content come in a variety of formats?			
Does content reflect brand voice/personality/visual identity?			
Is there a clear CTA?			
What does the most successful content have in common?			
What channels are used to promote?			
Any notable observations (good, bad, or interesting)?			

Step 2

Audit Your Content (Cont.)

Questions to Ask	Performance Content	Talent Content
What stage of the buyer journey is it made for?		
What persona does this content speak to?		
Does content come in a variety of formats?		
Does content reflect brand voice/personality/visual identity?		
Is there a clear CTA?		
What does the most successful content have in common?		
What channels are used to promote?		
Any notable observations (good, bad, or interesting)?		

Step 3

Audit Your Competitors

**Review your competitor content one category at a time, using these questions to document your collective observations.**

Questions to Ask	Competitor 1	Competitor 2	Competitor 3
What stage of the buyer journey is it made for?			
What persona does this content speak to?			
Does content come in a variety of formats?			
Does content reflect brand voice/personality/visual identity?			
Is there a clear CTA?			
What does the most successful content have in common?			
What channels are used to promote?			
Any notable observations (good, bad, or interesting)?			

Step 4

Key Takeaways

Based on your audit, identify your biggest opportunities for improvement in the following categories.
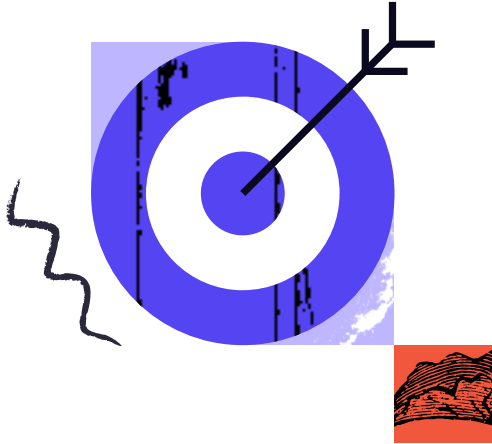
Persona	
Buyer Journey	
Messaging	
Topics	
Formats	
Distribution	
Other	
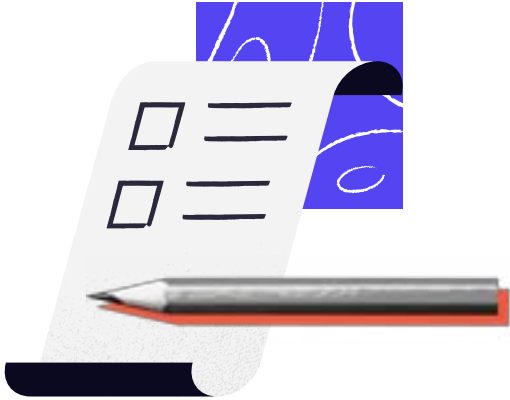
Tool and Tech Stack Checklist

Use this checklist to document the tools you use to create, host, and distribute your content.

For detailed instructions, see our **Guide to Build a Content Strategy**.

Tool	Purpose	Owner	Cost	Subscription Type (monthly/yearly)	Additional Details (contract end date, etc.)

Content Strategy Goals Template

Use this template to document your content strategy objectives and key results.

For detailed instructions, see our **Guide to Set Marketing Goals**.

1. Content Strategy Statement

Simply fill in the blanks, being as specific as possible.

We will _____ by _____
[action]   [how/where you plan to deliver content]

so that _____ .
[connect everything back to your goals]

Example: We will <u>create a hub where basketball fans can connect</u> by <u>offering style tips, resources, and information about basketball shoes</u> so that <u>we can increase conversions 20% over the next year</u>.

2. OKRs

Define your Objectives and Key Results to support your overall content strategy.

Objectives: These are your high-level content strategy goals (e.g., develop a new social media marketing strategy). Choose 3-4 objectives.

Key Results: These measure how close you are to achieving your objectives. For each objective, identify 3-5 measurable and quantitative key results (e.g., increase site traffic from paid social channels by 20%).

Objective 1: _____

_____

Key Results: 1 _____

2 _____

3 _____

4 _____

5 _____

Objective 2: _____

_____

Key Results: 1 _____

2 _____

3 _____

4 _____

5 _____

Objective 3: _____

_____

Key Results: 1 _____

2 _____

3 _____

4 _____

5 _____

Objective 4: _____

_____

Key Results: 1 _____

2 _____

3 _____

4 _____

5 _____

Personas Template

Use this template to identify and segment your audience so that you can create tailored messaging that makes an impact.

For detailed instructions, see our **Guide to Create Marketing Personas in 4 Steps**.

	Persona 1	**Persona 2**	**Persona 3**
Name Assign a name to reference in future conversations.			
Age Include a range if needed.			
Gender Include if applicable.			
Job title Include if applicable.			
Channels Identify the places you can connect with them.			
Goals Identify their main aspirations.			
Pain points Identify the barriers they want to overcome.			
How your product/ service helps solve their problems Identify the messages you want your content to convey.			
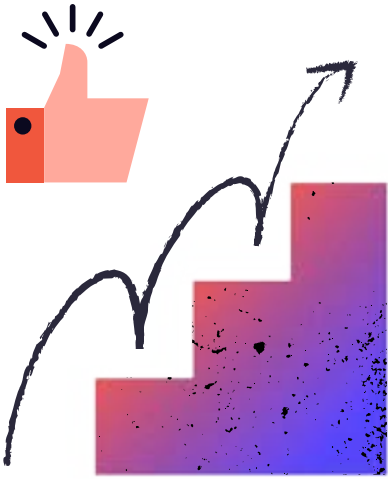
Customer Journey Template

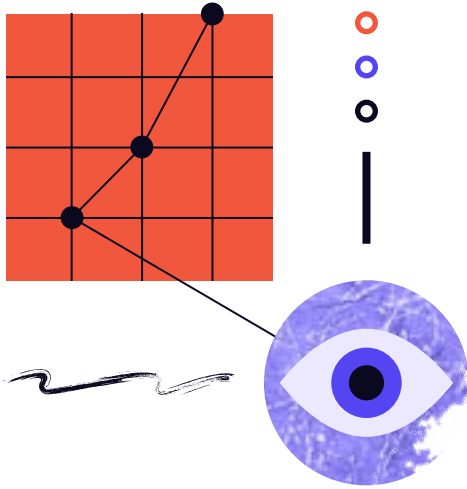**Use this to identify what your customers need to hear as they move along the path to purchase.**

For detailed instructions, see our **Guide to Map Your Customer Journey**.

Category	**Pre-Purchase**		
Function	**Marketing**		**Sales**
Stage of Journey	**Awareness** People are aware of your brand's existence.	**Consideration** People consider your brand as a purchase option.	**Analysis** People analyze whether your brand is right for them.
KPIs How will you measure success at each stage?			
Messaging What do people need to hear to take the next step?			
Emotion What do you want them to feel?			
Content What content will deliver that message effectively?			

Category	Purchase	Post-Purchase
Function	**Sales**	**Customer Experience**
Stage of Journey	**Purchase** People decide whether or not to purchase from you.	**Loyalty** People decide whether they should continue to buy from you.
KPIs How will you measure success at each stage?		
Messaging What do people need to hear to take the next step?		
Emotion What do you want them to feel?		
Content What content will deliver that message effectively?		

Content Pipeline Template

Use this template to build out a high-level view of your content strategy for the next year.

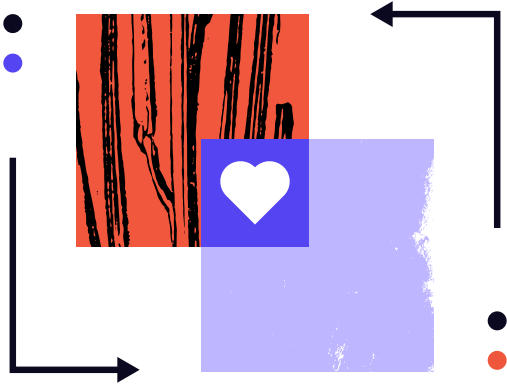For detailed instructions, see our **Guide to Build a Content Strategy**.

Q1	Q2	Q3	Q4
Objective(s):	**Objective(s):**	**Objective(s):**	**Objective(s):**
Key Result:	**Key Result:**	**Key Result:**	**Key Result:**
Priority Actions:	**Priority Actions:**	**Priority Actions:**	**Priority Actions:**
Milestones/Events:	**Milestones/Events:**	**Milestones/Events:**	**Milestones/Events:**

Workflow and Governance Template

Use this template to outline the various stages of your content production process and ensure that everyone knows who is responsible for what.

For detailed instructions, see our **Guide to Build a Content Strategy**.

Stage	Task	Owner	Review/Approval
Pre-Production			
Production			
Publishing			
Distribution			
Reporting			
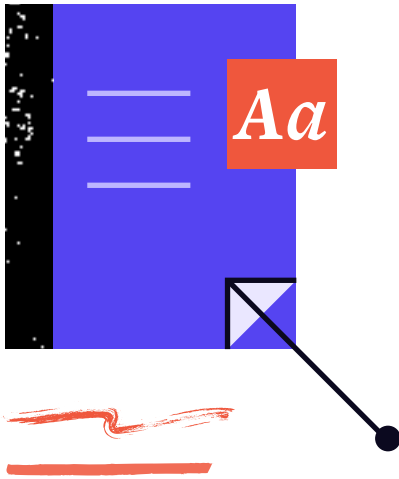
Marketing Campaign Template

Use this template to document your campaign goals, ideas, messaging, and more.

For detailed instructions, see our **Guide to Run Successful Marketing Campaigns**.

Content Strategy Statement

Objective

Key Result

KPIs

Persona

Customer Journey Stage

Budget

Campaign Name

Concept

Why It Works

Messaging

Tagline A single sentence that summarizes your campaign.	
Primary Message The main message you're trying to deliver (used for internal purposes).	

Supporting Benefits Key benefits to reinforce in content.			
Talking Points The core messages that support your benefits.			
Content Idea/Format			
Channels			
Keyword(s)			

Sample Copy/Links to Inspiration Images
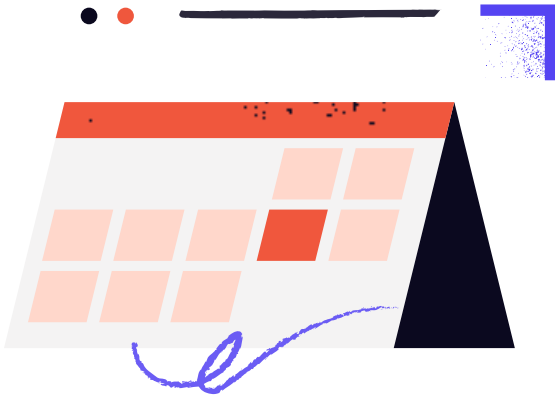
Editorial Calendar Template

Use this template to build out your content schedule, assign ownership, and ensure you maintain a consistent publishing schedule.

For detailed instructions, see our **Guide to Build an Editorial Calendar**.

Your editorial calendar should be customized for your team's unique content needs. Instead of a PDF template, we've created a Google Sheets Editorial Calendar that can be modified as you see fit.

How to use it:

1. Copy the Google Sheet.

2. Add, delete, or edit fields.

3. Share with everyone on your team to keep everyone on the same page.

Get Editorial Calendar Template

MON	TUE	WED	THUR	FRI	SAT	SUN

Content Brief Template

Use this template to assign new content projects and keep your team on the same page.

For detailed instructions, see our **Guide to Build a Content Strategy**.

Project Title

Overview

Budget

Timeline

Persona(s)

Success Metrics

Key Messaging

Tone

Specs

Current and Recent Projects (if applicable)

Additional Considerations

Feeling stuck? We'd love to help.
Find out what it's like to work with us
on your content strategy.

Created by

COLUMN FIVE

Column Five is a B2B-focused creative agency that helps ambitious
brands find and tell their best stories to drive real results.