

# CREATING AN ANNUAL CONTENT CALENDAR

Best Practice Guide and Resources



# Creating and Managing a Content Calendar

In today's world of constant communication, building a personal relationship between your firm and your clients can be challenging. However, sharing helpful educational information with your clients, prospects and centers of influence to remind them of your presence is an important aspect of your business. There are many ways to engage, but honing in on a strategy with defined goals will maximize your time and help ensure your content is seen and appreciated.

Deciding what content to share and what platforms you will use can seem overwhelming at times. Remember that the goal is to create content that is timely, interesting and applicable to your audience. Managing how and when your clients receive that information can be made easier by using the following steps and a helpful tool, like our Annual Content Calendar.

## STEPS FOR CREATING A CONTENT CALENDAR

### #1: IDENTIFY YOUR GOALS

Consider your communication end game. There are several possible business goals you could have driving your content creation:

- Growing brand awareness
- Promoting referrals
- Improving client education
- Increasing your audience

Are you looking to share information with clients you already have? Are you hoping to encourage new clients to refer? Do you want to provide an additional service to existing clients? Are you just looking to expand your digital presence and audience? Asking yourself these types of questions will help you define your content.

Think about which goals you are most excited to achieve and why. Remember to make these goals specific and measurable, so you will be able to easily evaluate how well your efforts are working.

### #2: FOCUS ON YOUR IDEAL CLIENT

Spend some time thinking about your ideal client's needs and wants. Who is she? What information does he need? What are his challenges and pain points? Where does she spend her time? What media will he most likely tap into on a recurring basis? Knowing your audience and clients at a deeper level will help you develop content that is impactful and valuable to them.

### #3: SELECT MEDIA CHANNELS

Begin brainstorming what information you will share and consider which distribution channel you naturally gravitate toward by identify your strengths as a communicator. Do you have a penchant for explaining financial concepts in a way that is amusing and relatable? You may find podcasts a good fit. Do you engage your clients in meaningful



email conversations and feel that they would benefit from a helpful monthly newsletter? After asking yourself these questions, select the ones that best resonate with your clients, limiting the number of media to a few.

If you already have a body of existing content, analyze which channels were the most effective and why. There are many tools which can help you analyze the effectiveness of your existing content, such as Google Analytics and BuzzSumo. Now is also the time to ask yourself if your existing content is in line with the goals you identified in step one and two.

#### #4: CREATE A CONTENT CALENDAR

Using a simple tool like our Annual Communication Calendar will help you organize the information you share. Your goal is to identify the content, frequency, and which audiences receive your communication and, finally, how they will receive it. There are many additional tools for managing your content, such as Kapost, HubSpot, and Contently, as well as project management tools like Asana and Trello, that will usually include content calendar templates. Use what works for you.

When building content, don't make the assumption that more content is always better. The key to an effective content strategy is consistency, not saturation. When creating content, remember to consider the needs and wants of your ideal client. Where is the gap in his or her understanding? Use these types of questions to create quality content that is shared on a very reliable basis.

#### #5: EVALUATE EFFECTIVENESS

Circle back to evaluate the extent to which you are achieving your goals. Use built-in metric tools to get a feel for which content was received well and use this data to shape your content calendar moving forward.

### BEST PRACTICES

- Don't sell. Inform. Be authentic, trustworthy and helpful.
- Strive for a fresh angle. Don't reiterate information that can be found from a simple Google search—add your wisdom, expertise and insight.
- Build toward writing content that includes key words for your audience to maximize search engine optimization (SEO).
- Be consistent! Consistency is more important than frequency.




# Resources

The below is a simple content calendar template you can customize. An editable version is available in Excel®; however, we recommend using technology tools such as Kapost, Hubspot, and contently or project management tools like Asana and Trello. Do what works for you.

## Annual Content Calendar

INSTRUCTIONS: Update and customize this calendar to organize your communications and content. An example of content has been provided for the month of January. As you build your own, be sure to customize the audience to align with your communication groups. This may include specific centers of influence (CPA, attorneys, etc.), only top clients or groups of clients who share interests / demographics.



LIMITLESS

MONTH	Content Type	Goal Date	Status	Clients	COIs	Prospects / Mailing List	Notes
January							
Happy New Years Cards	Mailed	12/27/2019	Sent	x	x		Custom cards designed with fun quotes from each team member, signed by team.
Retirement Resolutions Count Down	Social Media	1/3/2020	Sent	x		x	
Bring on the New Year (Client appreciation)	Newsletter	1/6/2020	Drafted	x	x	x	Thank you 'letter' to clients, share what's ahead for new year, 5 tips for retirement resolutions.
"How Not to Run Out of Money in Retirement"	Social Media	1/10/2020	Drafting	x	x	x	Caption from recent speaking event held
Retirement Planning in your 50s	Blog post	1/20/2020	Pending	x	x	x	Share Elizabeth's story, post to social media & website
Retirement Planning in Your 50s	Social Media	1/27/2020	Pending				Short version of blog post
February							
March							
April							
May							