Solution Guide
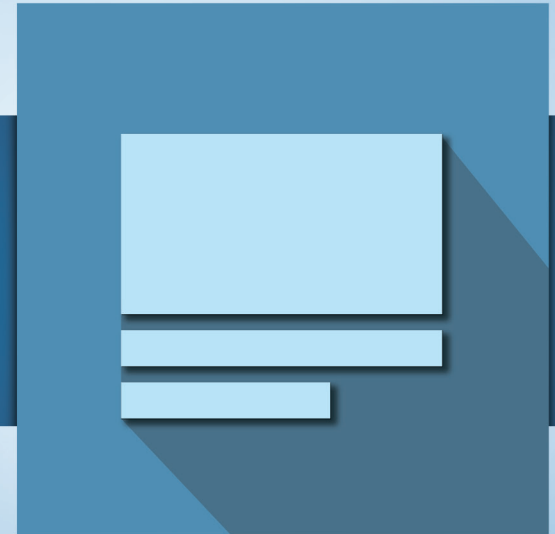
MARKETING .01

Content Marketing

Find it online: smartsheet.com/marketing-solutions/content-marketing

✓ **smart**sheet

About Content Marketing

Content marketing is focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience. And, ultimately, to drive profitable customer action.

This content-centric strategy continues to be a top priority for marketers, and this guide is built to help you use Smartsheet to maximize your content plan.

Generate better ROI from your content
Our Channel Plan helps you brainstorm and document a focused, efficient strategy.

Rally around a single editorial calendar
Give your team a single editorial calendar so you know who's creating what, when and for whom.

Create targeted content
Develop customer personas to make the right content for the right audience.

See progress in real time
Track content development in real time so you never miss a deadline.

Who should use this guide?

Whether you're a marketing professional building new content or seeking ways to improve your current strategy, you're in the right place.

Common roles/titles who would benefit from this solution include:

Marketing Directors

Marketing Managers

Content Marketers

Project Managers

Marketing Operations Managers

Marketing Consultants

Creative Agencies

Writers

Designers

What You'll Learn

This guide is designed to show you how you can build and execute a world-class content strategy with Smartsheet. This guide will cover the following:

1   An overview of the solution

2   A tour of the individual sheets

3   How to get going

4   Helpful resources and cheat sheets

Components

1 PLAN

Content Channel Plan

Align channels with people, dates and content in this cornerstone of your marketing plan.

2 COLLABORATE

Content Calendar

Rally your team around dates and deliverables, and foster accountability.

3 CREATE

Customer Personas

Content Creation Checklist

Agency Creative Brief

Customer Stories

Help your content creators deliver targeted pieces that resonate with the right audience.

Content Channel Plan

Equally important to creating great content is building a plan for how this content will reach its intended audience. Smartsheet's Content Channel Plan helps you think about how to adapt content to specific channels while staying aligned with your overall strategy.

			Channel	Name and Type	Examples	Author(s)	Target Personas	Tone	Frequency
1			**A** ⊟ Blog				"Tom" **D**		**2-3 posts / week**
2				Product News	Product updates Company announcements and awards	John Smith Janine Keys		Professional	As appropriate
3				Market Trends	Trends and best practices for 2015 Using the cloud for project management	Maria Salazar	"Sally"	Professional	4x / month
4				Tips & Tricks	How to do something Tips for doing something better Did you know	Ralph Finley	"Tom"	Casual	2x / month **E**
5				Case Studies	How another customer does something Benefits realized by a customer	Morgan Keegan	"Sally"	Conversational	As appropriate
6				Thought Leadership	Opinion pieces Links to posts on other sites Whitepapers	Maria Salazar Tanner Kendrick	"Sally"	Professional	2x / month
7			**A** ⊟ Social Media						**~5 posts / week**
8				Cross-posting of: Product news **B** Blog posts Case studies	Product updates Company announcements and awards	Maria Salazar	"Tom"	Casual	As appropriate
9				Influencer Content	Links to relevant articles Analyst reports Commentary on industry trends	Maria Salazar Tanner Kendrick	"John"	Conversational	4x / month
10				Partner Content	Partner program updates **C** Incentives	Morgan Keegan	"Kim"	Conversational	1x / month
11			⊟ Webinars						**~4 / month**
12				Product Walkthrough	General Product Orientation				
				Getting Started	Product Orientation for "Tom"				

A Use hierarchy to group your content by channel so you can see the customer experience within each channel.

B List the types of content for each channel to ensure you have the right variety.

C Set contact list columns for your authors so you can request updates and set alerts from Smartsheet.

D Use your personas to verify that your content is built for the right audience.

E Define publishing cadence for each channel so you don't over-serve or under-serve any of your target audiences.

A Attach drafts or final deliverables so others can see the content being created.

B Set custom permissions and easily share the calendar with your internal and external content creators.

C Easily toggle to a traditional calendar view.

D Drive accountability by layering in dates and status.

E Color-code content types to visualize your frequency.

Content Calendar

A content calendar is the pillar of your content strategy, and Smartsheet is the perfect tool for a content calendar with its extra collaboration features. You can see who is creating what for when and the status of each piece, as well as attach deliverables and have discussions within the calendar.

Customer Personas

Creating relevant content on a monthly, weekly or even daily basis can be overwhelming. This leads to poor content that doesn't resonate with the intended audience. Personas can help create the right content for the right people. Having them in Smartsheet makes it easy to update and share the latest version.
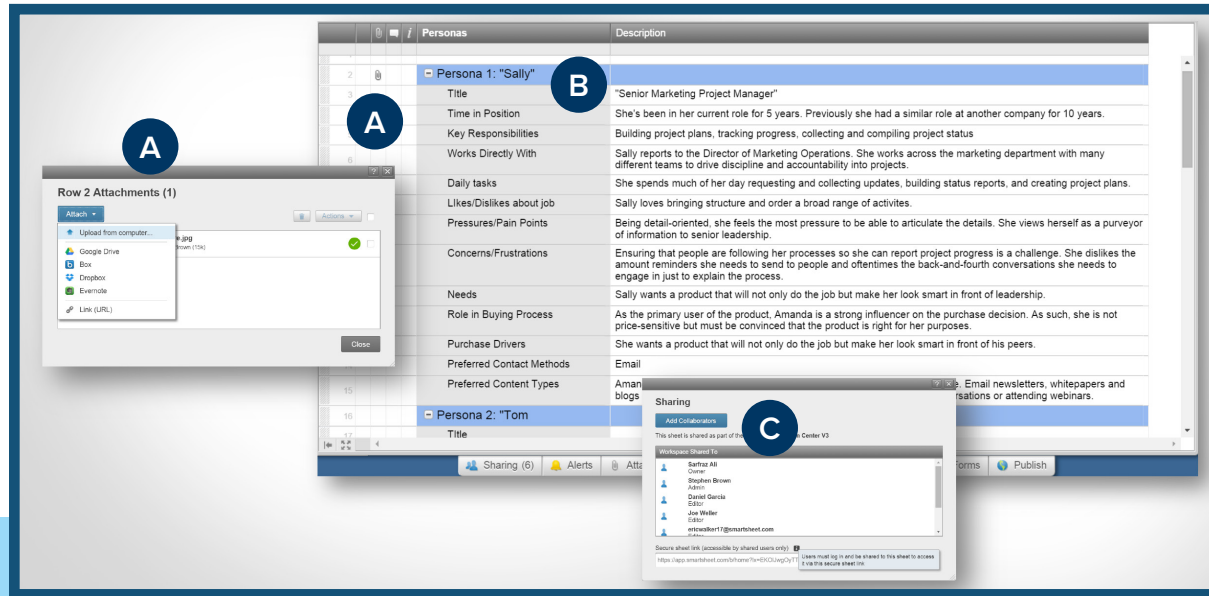
A Attach a picture to help others connect with the persona.

B Securely share this sheet so your teams and vendors always have the latest version.

C Give your personas relatable names so you can easily reference them when developing your content plans.

✳ The number of personas you develop should represent the diversity of your target demographic. Identify personas that are distinct and detailed, and that adequately illustrate your users' characteristics.

✳ Identify personas help you think through the best messaging and content vehicles to reach your target audience.

A A common methodology helps maintain consistency across content and channels.

B Content creators love Smartsheet because they can show status and progress right alongside their content.

C Show progress and status through checkboxes and RYG columns.

**D** Leverage your personas so you know who you're creating content for.

Content Creation Checklist

With a team of different internal and external content creators, it can be a challenge to keep a consistent tone and stay on-message. Develop a methodology around your content creation process to ensure that you always create great, relevant content, no matter who is creating it.

				Complete	Status	Action Item		Details		Additional
1				-		⬛ **Content Inputs**	**A**	**Details**		**Additio**
2				✔		Channel Type(s)		Blog		
3				✔		Author		John Smith		Alterna
4		💬		✔		Topic or Headline		"10 Ingredients for Successful Projects"		
5		📎		✔		Persona(s) Addressed		"Sally" and "Tom"	**D**	
6				✔		Tone		Conversational		
7		💬		✔		Summary		A blog post outlining the 10 ingredients for successful projects. We'll use the ingredients to answer the questions. What is project success? How is it defined? Does it differ from project to project or customer to customer? Certainly there are varying degrees of project success and failure, right?		
8				✔		Key Objective		Demonstrate to the customer that we have the expertise to help them with their challenges. Secondary to that is showing how our product can help them with those challenges.		
9				✔		Call to Actions		(1) Engage in the conversation by commenting on the post. (2) Sign up for a free trial of our product		
10				✔		Languages		English, French and Spanish (and potentially Russian)		
11				-	🟢	⬛ **Creation Status**		**Details**		
12				✔	⚪	Deadline Date		August 24th		
13				✔	⚪	Other Key Dates		On August 25th, we are presenting at the Content Marketing Symposium on this topic and will cite this post.		
14				✔	🟢	...nning	**C**	drafted and reviewed the plan with the team		
15				✔	🟢	Drafted Text		first draft is complete		
16		📎		☐	🟡	Drafted Visuals		we have some visuals that will work with some minor updates		
17				☐	🔴	Preliminary Editorial Review		still waiting for copy review - copy editors have a backlog		
18					🟢	Redraft				

Sharing (6) | Alerts | Attachments (2) | Discussions (2) | Update Requests | Web Forms | Publish

Content Marketing Solution Guide

Customer Stories

Real customer stories are a powerful part of any marketing toolkit. Building a great story often means a lot of back and forth with the customer, followed by intense collaboration with your team of writers, designers and marketers. Smartsheet helps you do all that and more in the most efficient way possible.
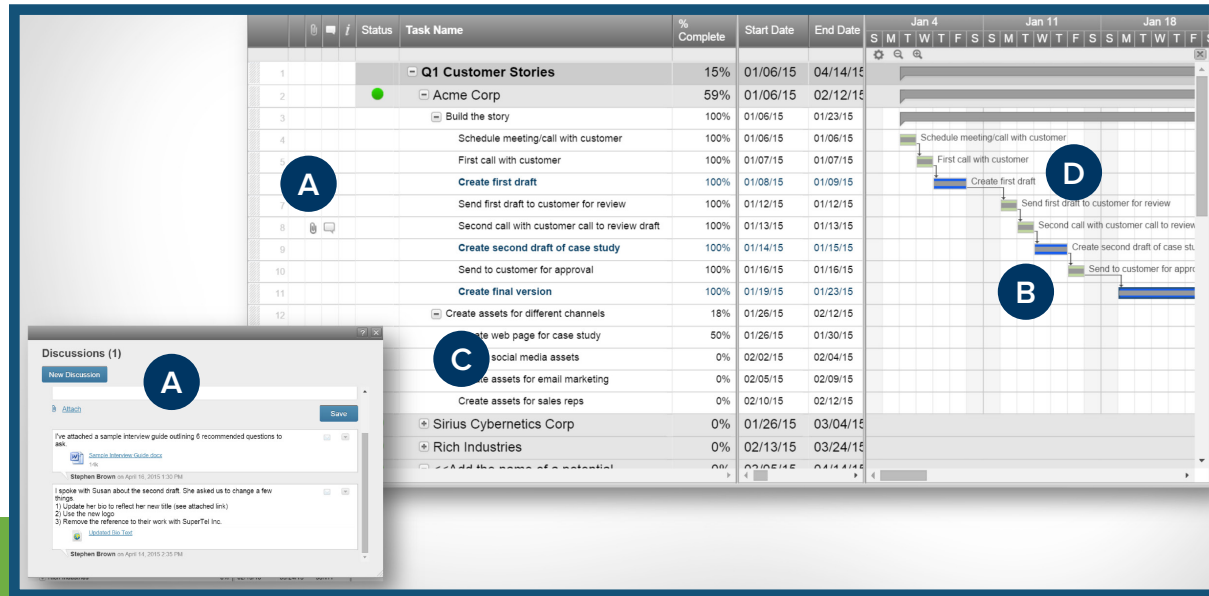
A Log customer notes, attach interview guides, and document customer interactions.

B Easily switch to a Gantt chart view to visualize timelines and dependencies. Color-code tasks for quick visual reference.

C Use hierarchy to group subtasks.

D Color-code tasks for quick visual reference.

A Engage your agency in discussions within Smartsheet to keep things in context.

B Keep your agency on-message by attaching your branding and positioning documents.

C Share this sheet directly with your agency contacts. Remember, collaborators are always free with Smartsheet!

D See agency progress in real time so your check-in meetings revolve around what matters – the content.

Agency Creative Brief

Communication is key to a successful relationship with your agency. Smartsheet's Agency Creative Brief helps you document tasks, files, and discussions in one centralized location, keeping everyone aligned on scope, budget and expectations.

Jump-Start Your Content Marketing with Smartsheet

✓	**Read through the solution guide**	You've had an overview of the solution – now try Smartsheet for yourself.
◯	**Sign up or log in to Smartsheet**	Sign up at **smartsheet.com/marketing-solutions/content-marketing** You can also use this with your existing account by logging in.
◯	**Open the Getting Started Sheet**	Once you're in Smartsheet, click on the "Getting Started" sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.
◯	**Customize the sheet**	The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.
◯	**Start working and sharing**	To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.

Content Marketing Solution Guide

Other Recommended Steps

◯	**Delete sheets you don't need**	Deleting a sheet is easy! You can learn how to [here]().
◯	**Build your own sheet**	We know you have unique needs – that's why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.
◯	**Use the "cheat sheets" in this guide**	To help you get the most out of Smartsheet, we've included cheat sheets for formulas and shortcuts at the end of this guide.

Have questions or want to learn more about Smartsheet?

Smartsheet Help Center - help.smartsheet.com

       Everything you need to help you get the most out of Smartsheet.

Smartsheet Community - community.smartsheet.com

       Ask questions, share best practices, and get help.

Submit your question - solutions@smartsheet.com

       Want personalized help? Our design and services teams have you covered!

Send us your feedback - help.smartsheet.com/customer/portal/emails/new

       Share your thoughts or suggestions about Smartsheet or our Solutions.

Plans and Pricing - smartsheet.com/pricing

       Enjoy your 30-day free trial.

Smartsheet Cheat Sheet
Keyboard Shortcuts

Basics

F2 / **Fn** + **F2**   Enters **edit mode** on selected cell

Ctrl + **S**   **Saves all** unsaved information

Ctrl + **Z**   **Undo** the previous action since last save

Ctrl + **Y**   **Redo** the previous action since last save

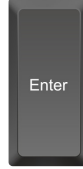**Ins**   **Inserts** a row above the selected row.

↓
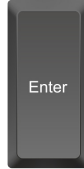
To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins** .
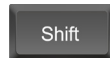
Formatting

Ctrl + **Enter** (or) **Alt** + **Enter**   Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.

Ctrl + **K**   **Indents** Primary Column only

Ctrl + **M**   **Outdents** Primary Column only

Ctrl + **I**   Italic

Ctrl + **D**   Fill down *(also available by dragging cell corner)*

Ctrl + **B**   Bold

Ctrl + **U**   Underline

NOTE: Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.

Formulas

Ctrl + **L** **x 1** — Inserts **$** before column name (horizontal cell reference lock).

x 2 Inserts **$** after column name (vertical cell reference lock).

x 3 Inserts **$**'s around column name (full cell reference lock).

Date Column Cells

t:	Inserts today's date.
+:	Enters date x days from today.
-:	Enters date x days before today.
mon / tue / wed /	etc... Inserts date of the current week's Monday, Tuesday, Wednesday, etc.
yes:	Inserts yesterday's date.
tom:	Inserts tomorrow's date.
next week:	Inserts date seven days from today.
last week:	Inserts date from seven days ago.
Dec 15 / Jan 3 /	etc: Inserts date of string entered.

Additional

Ctrl + **L** — Displays the **Open a Sheet** form.

Ctrl + **G** — Displays the **Go To Row** form. Type in the row number you'd like to scroll to then click OK.

Home — Takes you to the first cell of the row you are currently on.

Ctrl + **Home** — Takes you to the top left cell of your sheet.

End — Takes you to the last cell of the row are are currently on.

Ctrl + **End** — Takes you to the bottom right cell of your sheet.

Pg Up — Moves you up in your sheet.

Pg Dn — Moves you down in your sheet.

Space — Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our **Column Types** article.

Smartsheet Cheat Sheet
Formulas

Numeric Formulas

SUM(): Adds selected values, or a range of cells.
> Example: =SUM(Cost1: Cost5)
> Result: 1125.75

AVG(): Averages selected values, or a range of cells.
> Example: =AVG(Cost1: Cost5)
> Result: 225.15

MAX(): Returns the highest numeric value, or latest date.
> Example: =MAX(Cost1: Cost5)
> Result: 425.75

MIN(): Returns the lowest numeric value, or earliest date.
> Example: =MIN(Cost1: Cost5)
> Result: 100

INT(): Returns the integer portion of a given number.
> Example: =INT(Cost5)
> Result: 425

ROUND(): Rounds a given number to the desired # of digits.
> Syntax: ROUND(cell1, #_of_digits)
> Example: =ROUND(Cost5, 1)
> Result: 425.8

ABS(): Returns the absolute value of a given number.
> Example: =ABS(-85)
> Result: 85

COUNT(): Counts non-blank cells in a given range.
> Example: =COUNT([Task Name]:[Task Name])
> Result: 5

LEN(): Returns the number of characters (length) in a given cell.
> Example: =LEN([Task Name]5)
> Result: 6NOTE: Formatting/currency values aren't included.
> Dates have a length of 5.

Logic Formulas

IF(): Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

> Syntax: IF(logical_test, value_if_true, value_if_false)
> Example: =IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger"
> Result: Date 2 is Larger

ISBLANK(): Used within an IF formula to test if a cell is blank.

> Example: =IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn't blank")
> Result: Cell isn't blank

ISTEXT(): used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

> Example: =IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn't text")
> Result: Cell isn't text

ISNUMBER(): Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

> Example: =IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn't a number")
> Result: Cell isn't a number

ISDATE(): Used in an IF formula to test if a cell contains a date.

> Example: =IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn't a date")
> Result: Cell is a date

ISBOOLEAN(): Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

> Example: =IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn't a boolean")
> Result: Cell is a Boolean

Smartsheet Cheat Sheet
Formulas

Logic Formulas (cont.)

AND(): Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

> Syntax: AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)
> Example: =IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")
> Result: Tasks Incomplete

NOT(): Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

> Syntax: NOT(Done1)
> Example: =IF(NOT(Done1), "Task A Not Complete", "Task A Complete")
> Result: Task A Complete

OR(): Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

> Syntax: OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)
> Example: =IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")
> Result: Due Date 1 is the smallest

NESTED IF(): Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

> Syntax: IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))
> Example: =IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))
> Result: This is Task A

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Additional Formulas and Help

Formula Basics - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

Text Formulas - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

Date Formulas - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

Advanced Formulas - smartsheet.com/date-formulas
Weighted average, prorate, countif, countif s, sumif, sumif s

Using Hierarchy in Formulas - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

Formula Error Messages - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot

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Last Updated: May 2015