Mastering Content Management

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Become a Content Master

You built a business case for a response management and sales enablement platform. You engaged RocketDocs to streamline and support your sales goals. You partnered with a Customer Success Manager (CSM) to develop a library structure that fits your needs using industry best practices. But now what?

At RocketDocs, our clients repeatedly express that one of their greatest challenges is keeping their RocketDocs content library up to date.

If you don't have a content management plan in place, your content can quickly become outdated and obsolete. Regularly reviewing content for quality, accuracy and consistency is crucial to producing competitive RFP responses and landing bigger, better, faster wins.

We know how difficult this can be — content management can feel disruptive when you're constantly jumping from one RFP to the next. Plus, it can be a full-time job in and of itself. You know it's important to prioritize this step with your team, but how do you administer it? Let's start with the following three-pronged content management framework:

01 ESTABLISH A CONTENT OWNER

If you don't have one already, appoint a content owner who will serve as gatekeeper to all content changes and additions. This person will be empowered to take ownership of the content library, devise a content management plan, and be the primary decision-maker and champion for the content management system.

We recommend regular check-ins with content users and SMEs. Meeting with users will help to identify any information gaps, rewrite suggestions, and pain points. Checking in with SMEs will strengthen those relationships, foster improved SME participation and confidence, and keep SMEs informed of any process updates.

02 SYSTEMATICALLY ARCHIVE OBSOLETE OR UNUSED CONTENT

Allowing antiquated content to overrun your library will slow down the RFP process and increase the risk of writers using outdated information. Devise a cadence for archiving outdated or unused content. RocketDocs captures usage data that will help determine when and how often the content has been used. For example, if there are two similar responses but one hasn't been used in a year, it may be time to archive it. Keeping the library concise will expedite searching and allow writers more time to personalize and polish responses.

03 VALIDATE THAT CONTENT IS ACCURATE, CONSISTENT AND COMPLIANT

Depending on the size of your content library, this essential step could take some time, but it will pay great dividends in building trust in your content. It will also affirm that validated content is accurate, consistent and compliant. Fortunately, RocketDocs has built-in tools that will help you automate your content management process, which we will discuss in further detail below. Additionally, always feel free to consult your RocketDocs CSM to discuss features that can aid in this process.

Let's dive a little further into the content management process

Before implementing content management plan, have your content owner review the existing content to evaluate and verify that every record is assigned to the correct SME.

To kick off the content management plan and garner SME buy-in, consider hosting individual meetings to identify known library issues, outline a plan of action, and establish expectations. The agenda may look something like this:

- Provide examples of known issues that support the need for a content management plan

- Propose a solution to ensure content is regularly maintained and validated

- Determine appropriate review frequencies (too infrequent reviews will lead to outdated/unusable content while too frequent reviews are likely to leave SMEs overwhelmed and frustrated)

- Set editing expectations

- Discuss the negative consent rule

- Summarize and emphasize how this benefits them

The review frequencies can vary based on the nature of the organization and content, but we recommend that all active content be reviewed at least annually. That said, some content changes more frequently, so quarterly reviews may make more sense.

If an SME is unsure about their preferred frequency, suggest starting out quarterly and then scale back over time if they find that's not sustainable. The first review will be the most burdensome, but going forward, the time to review should decrease exponentially. Eventually, edits may be minimal, but the review process will continue to serve as a reminder to SMEs to inform the content owner of any new developments that occur in between review cycles.

When establishing editing expectations, let your SMEs know what to look for in their review. Some suggestions might be to correct errors, update information, refresh data, provide clarity, and remove repetitive or confusing language. Most importantly, they should verify that the current response accurately and concisely answers the question. If you have an additional editorial review in place following the SME review, make sure that your SMEs are aware of this part of the process as well. This way they can focus their attention on content accuracy knowing someone else will review their responses for grammatical errors.

Ask your SMEs to always track changes. This is important for several reasons: it helps to identify typos, edit for tone and readability, and check consistency — their change may affect other responses in the library.

Lastly, create a sense of urgency. Make it very clear that content is live even when undergoing a content review. RFPs don't stop to wait for content verification. The sooner they give you their edits, the sooner they will be implemented.

In the initial meeting, obtain agreement from all SMEs that if edits aren't received by the deadline, it is assumed there are no changes — in other words, negative consent. It is not sustainable for your content owner to send multiple reminders to multiple people every review cycle. When a review is initiated, determine a reasonable due date (based on the size and scope of the content being reviewed), and follow up one time only. The onus is now on the content owner to accept ultimate responsibility for the quality and accuracy of their content.

If this all seems overwhelming, we have great news — RocketDocs can help you automate your entire review process! Using RocketDocs, you can:

- Assign content owners

- Assign SMEs

- Set review cycles

- Track approved and expired content

- Set notifications and alerts for regular friendly reminders

- Bulk review content or review questions one at a time, or in a staggered manner as content records expire

- Use workflows for automation of the review process

Each review, it will only take a few clicks to send records to each SME and incorporate their changes back into the library.

Content management is well worth the time and will yield numerous benefits. Your SMEs, compliance team, and salespeople will become significantly more confident in your content. By being proactive instead of reactive, your content is always ready to go when an RFP comes in the door. Most importantly, your writers save time and SMEs have fewer ad-hoc reviews with each RFP. In addition, when content reviews are separate from RFP reviews (which often have tight deadlines), contributors can review their language more thoughtfully and thoroughly.

With a content management system and a content owner in place, the procedures for SME transparency, writer check-ins, and ongoing content reviews will lead to a more scalable process — plus onboarding new team members will be easier than ever. Are you ready to leverage the power of content management to build faster, more accurate and competitive proposal responses? RocketDocs is here to help.
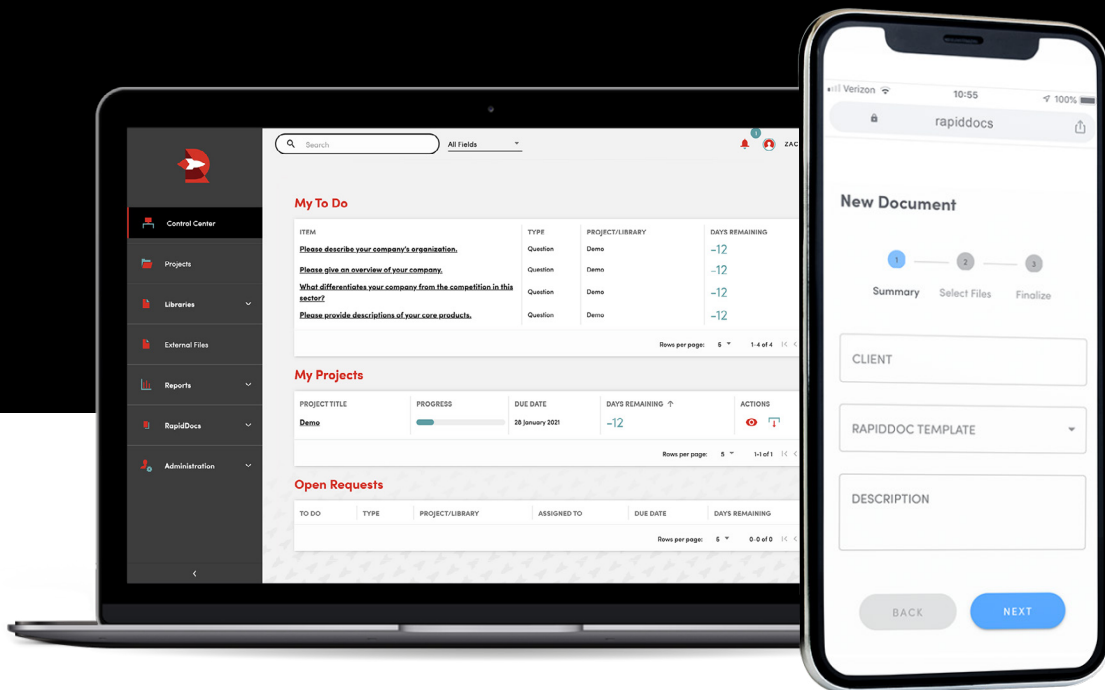
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Tonya joined RocketDocs in 2020 as a Customer Success Manager. Prior to joining RocketDocs, Tonya spent more than 11 years in the asset management industry and was a user of the RocketDocs platform for more than seven years. Tonya was a Vice President, Investor Relations at Brookfield Asset Management where she supported the firm's global sales and RFP efforts through library administration, content management and development, proposal execution, standard RFI automation, and various other strategic initiatives. Prior to Brookfield, she was the RFP Team Manager at Mesirow Financial. Tonya received a Bachelor of Music in Education from Millikin University in Decatur, Illinois.

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