

Content Automation Checklist

Purpose: To provide a comprehensive, step-by-step guide to setting up content marketing automation, ensuring all essential tasks are covered for an efficient and effective automation process.

1. Define Goals

- **Determine Primary Objectives:**
 - **Increased Engagement:** Set a goal to increase likes, comments, shares, and other engagement metrics on your content.
 - **Consistent Posting:** Aim to maintain a regular posting schedule across all platforms.
 - **Better Audience Targeting:** Focus on delivering personalized content to different segments of your audience.
 - **Improved Conversion Rates:** Strive to turn more of your audience into customers.
- **Set Specific, Measurable Goals:**
 - **Number of Posts:** Define how many posts you want to publish per week/month.
 - **Engagement Rate:** Set a target for the average engagement rate you aim to achieve.
 - **Conversion Rate:** Determine the percentage of engaged users you want to convert into customers.
 - **Reach:** Specify the number of people you aim to reach with your content.

2. Choose the Right Tool

- **Research Available Tools:**
 - **HubSpot:** Comprehensive tool with CRM, marketing, and sales capabilities.
 - **ActiveCampaign:** Focuses on email marketing automation and customer relationship management.
 - **Sender:** Affordable tool for email and SMS marketing automation.
 - **Omnisend:** Known for its omnichannel capabilities, including email, SMS, and push notifications.

- **Match Features with Goals:**
 - Ensure the tool supports your specific goals, such as social media scheduling, email marketing, or analytics.
- **Test Trial Versions:**
 - Use free trials or demo versions to assess the usability and features of each tool.
- **Consider Integration:**
 - Check if the tool integrates well with your existing platforms (e.g., CRM, social media, website analytics).

3. Identify Tasks for Automation

- **List Repetitive Tasks:**
 - **Social Media Posting:** Schedule posts in advance for various platforms.
 - **Email Campaigns:** Automate sending newsletters, promotional emails, and follow-ups.
 - **Content Updates:** Automate the publishing of blog posts and updates.
 - **Engagement:** Set up automated responses for common inquiries or comments.
- **Evaluate Impact and Time Savings:**
 - Prioritize tasks that are time-consuming but repetitive, offering the most significant time-saving benefits.
- **Example Tasks:**
 - Scheduling weekly social media posts.
 - Sending welcome emails to new subscribers.
 - Automatically sharing new blog posts on social media.

4. Segment Your Audience

- **Analyze Your Audience Data:**
 - Collect data on demographics, behaviour, and engagement metrics from your existing audience.
- **Create Audience Segments:**
 - **By Demographics:** Age, gender, location, etc.
 - **By Behavior:** Purchase history, browsing patterns, etc.
 - **By Interests:** Topics they engage with the most.
- **Use Automation Tools:**
 - Utilize features in your automation tool to create and manage audience segments effectively.

5. Create Workflows

- **Map Out Each Workflow:**
 - Define the sequence of actions from the trigger event to the final outcome.
- **Use Templates:**
 - Start with pre-built templates for common workflows, then customize them to fit your needs.
- **Test Workflows:**
 - Run initial tests to ensure the workflow operates smoothly and make adjustments as needed.
- **Example Workflow:**
 - **Trigger:** New blog post published.
 - **Action:** Automatically share on social media platforms.
 - **Condition:** Check if the post category is "Marketing."
 - **End Result:** Increase in blog traffic and social media engagement.

6. Review Metrics

- **Set Benchmarks:**
 - Establish initial metrics for comparison to gauge the effectiveness of your automation efforts.
- **Monitor Performance:**
 - Use analytics tools to track key metrics such as engagement, reach, and conversions.
- **Adjust and Optimize:**
 - Continuously refine workflows based on performance data to achieve optimal results.
- **Metrics to Track:**
 - Engagement metrics: Likes, comments, shares.
 - Reach metrics: Views, impressions.
 - Conversion metrics: Click-through rates, conversions.
 - Workflow performance: Completion rates, bottlenecks.