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OPTIMIZELY CONTENT MARKETING PLATFORM (CMP)

A MARKETING GEEK'S GUIDE

ABOUT THIS SERIES

There is a lot that goes into your marketing strategy, and it's not something you should go at alone. Lucky for you, our experts have you covered. At Relationship One, our mission is to "Inspire Success." We hope that reading through this eBook will inspire you to try something new, solve a problem you've been dealing with, or invent something that will take your marketing efforts to the next level.

Let our experts help you dive into an area of modern marketing that you're curious about and let the inspiration flood in.

OPTIMIZELY CONTENT MARKETING PLATFORM (CMP)

The Optimizely Content Marketing Platform streamlines content creation, collaboration, and distribution, empowering teams to produce high-quality, data-driven content efficiently while maximizing engagement and ROI.

By the end of this guide, you'll be well-equipped to determine if the Optimizely Content Marketing Platform is right for your business and how to leverage its capabilities to streamline your content strategy and maximize impact.

5 REASONS YOU NEED TO KNOW ABOUT THE OPTIMIZELY CONTENT MARKETING PLATFORM

Building a powerful and effective content marketing strategy is no longer optional—it's essential. Here's where Optimizely can help. Optimizely's Content Marketing Platform (CMP) is designed to streamline content creation and delivery workflows, optimize strategies, and elevate your marketing results. Whether it's hyper-personalization for your audience, managing complex digital assets, or anything in between, Optimizely offers innovative solutions that empower businesses to do more with less effort.

As you well know, content marketing isn't just about creating blogs, videos, and infographics; it's about telling stories and delivering value to your target audiences. When done well, it builds trust, drives traffic, generates leads, and ultimately helps businesses build long-term relationships with their customers.

More importantly, the statistics back it up. According to Demand Metric, content marketing generates three times more leads than traditional marketing and costs 62% less. But without a way to manage your content strategy, the growing demands from multi-channel campaigns, audience personalization, and performance tracking can easily overwhelm even the most seasoned marketer. This is where end-to-end solutions like Optimizely CMP step in to refine your strategy and provide a process framework to help you achieve outstanding results.
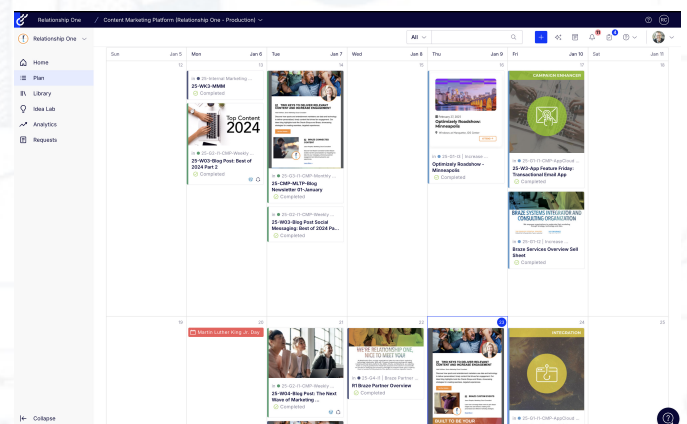
Optimizely CMP does more than streamline content creation; it transforms how you approach your goals. Users benefit from tools that automate workflows, contextualize data for better decision-making, and prioritize personalized customer experiences.

Read on to explore how Optimizely CMP can be the game-changing move your content strategy needs. From streamlining workflows to integrating seamlessly with your existing MarTech stack, here are the 5 main reasons why marketers trust Optimizely CMP.

REASON 1: CAMPAIGN PLANNING AND EXECUTION

One of the first benefits marketers experience is the ability to allow different users to have varying levels of access and permissions within the platform. Having users assigned to specific roles such as content creator, marketer, or analyst ensures that responsibilities are clear and aids in efficient collaboration while maintaining security.

Next, Optimizely CMP provides a visually intuitive calendar that streamlines the planning process for blog posts, social campaigns, or product announcements. Marketers can easily map out the company's strategy and spot content or campaign gaps that need to be filled.

Once marketers are building out campaigns, Optimizely CMP allows marketers to create campaigns using a simple drag-and-drop interface which provides flexibility in campaign structure. Marketers can define key details like objectives, target audiences, and budget allocation at the beginning so that all collaborators are clear on the goals of the campaign.

Optimizely CMP helps streamline campaign planning by automating workflows, approvals, and task assignments. The team stays aligned on objectives and deadlines by alerts and notifications about where the campaign is in progress, who is assigned to complete the workflow step, and what happens next. The ability to see where a campaign is stalled allows marketers to quickly react to mitigate any blockers and keep the campaign running smoothly.

REASON 2: REAL-TIME COLLABORATION AND COMMENTS

With Optimizely CMP, multiple team members can collaborate on projects such as content creation, experimentation set ups, and data analysis, ensuring alignment and accountability for the different stages of campaign execution. During the campaign and content creation process, team members can leave comments directly on content pieces, experiment set-ups, and landing pages. This in-line feedback allows teams to quickly share thoughts and make edits. It accelerates the QA process and helps marketers deploy content more quickly.

While marketers are running experiments such as A/B and multivariate tests, teams can collaborate in real time on experiment set up, results monitoring, and can easily iterate on strategies. Optimizely CMP's commenting and feedback tools allow for real-time discussions, reducing those back-and-forth email discussions threads and the dreaded "quick 15 minute meeting" that appears urgently on your calendar. Simplifying the feedback loop and being able to make fast, documented decisions keeps the process moving seamlessly, which reduces churn and ultimately, improves your time-to-market.

REASON 3: DATA SHARING & REPORTING

Optimizely CMP integrates with a variety of tools like analytics platforms (Google Analytics, Adobe Analytics), CRM systems (Salesforce, HubSpot), and marketing tools (Mailchimp, Adobe Marketo) so that marketers can collaborate across departments to share data and insights. This helps marketing, product, and sales teams remain informed and aligned with unified marketing strategies. Additionally, some versions of Optimizely CMP can integrate with Slack, allowing team members to receive real-time notifications about the campaign process, experiment results, and other alerts. A powerful campaign relies on smooth communication, and Optimizely CMP rises to the challenge.

Additionally, Optimizely CMP provides comprehensive analytics and reporting tools, giving you deep visibility into the performance of your content. You can track important metrics such as user engagement, conversion rates, and ROI to help you make informed decisions and improve your overall content strategy. The ability to integrate easily with other analytics platforms further enhances the depth of your reporting. Optimizely CMP also enables the integration of customer feedback and behavioral data into the collaboration process, allowing teams to align on strategy based on actual customer experiences. This real-time behavioral data can be shared across departments (product, customer service, and marketing) to help drive better decisions.

To take reporting and analytics a step further, marketing teams can create shared dashboards within the platform to provide a

snapshot of key metrics from experiments, customer data, or campaign performance. Sharing this data increases alignment across different team members and stakeholders.

REASON 4: ASSET MANAGEMENT

Ask any marketing team about a major roadblock, and chances are high they'll mention the challenge with managing assets. From downloadable PDFs to high-resolution graphics, thousands of files are scattered across cloud drives, desktops, and hard-to-track folders. Optimizely CMP's library addresses this pain point flawlessly. Marketers have a powerful repository of all assets that are tagged, searchable, and version controlled at their fingertips.
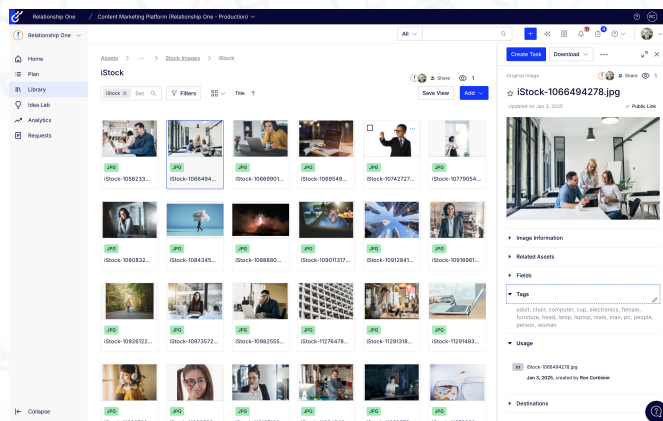
With Optimizely CMP's centralized library, marketers can store, access, and edit all their digital content in one streamlined system. No more hunting for assets or emailing huge files between team members. Additionally, marketers can use metadata tagging to ensure that assets are able to be searched and found, whether it's last month's infographic or last year's holiday campaign video. And lastly, by maintaining version control, marketers can track updates or revert changes without hassle, and always have the most current, deployable version at their fingertips. By organizing assets properly, marketing teams can save valuable time and ensure brand consistency across campaigns.

REASON 5: CONTENT ACCELERATION THROUGH WORKFLOW AND BRAND TEMPLATES

Marketing teams can automate recurring tasks or workflows within Optimizely CMP to streamline processes and reduce manual handoffs. For example, marketers can automate the assignment of experiments or content pieces to team members and then easily see if those assignments are complete, on-track, or overdue. Combining this with real-time collaboration tools and alerts, marketers reduce valuable time they would

normally spend on chasing completion status, the latest version of a content piece, and approvals to launch.
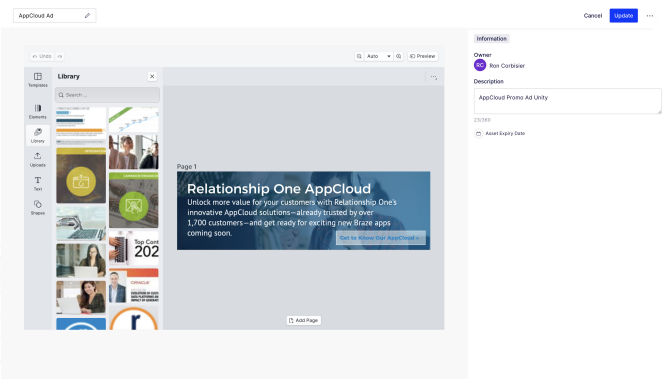
Additionally, Optimizely CMP's brand templates are powerful tools designed to enhance efficiency and maintain brand consistency in marketing efforts across all channels. By using brand templates, marketers can significantly reduce content creation time by providing pre-designed layouts with basic design elements already in place. This ensures a unified visual identity across all platforms and marketing materials. Even non-design savvy users can easily create on-brand content without extensive support from the creative team. Implementing brand templates enables companies to streamline the content creation process even further, ensure brand uniformity, and empower content creators to contribute efficiently to marketing campaigns.

WHY OPTIMIZELY IS A GAME CHANGER

Optimizely's Content Marketing Platform is designed to empower marketing teams with the tools they need to plan, execute, and optimize campaigns with high-quality, impactful content that drives business growth. Whether you're looking to improve workflows, optimize assets, or personalize campaigns, the platform empowers you to manage your content marketing strategy in a smarter, results-driven way. If you want to take control of your marketing strategy and secure long-term success in an increasingly competitive digital space, Optimizely is the partner you need.

CHAPTER 2:
IMPLEMENTING THE OPTIMIZELY CONTENT MARKETING PLATFORM – PRE-PLANNING

Optimizely Content Marketing Platform (CMP) is a marketing planner's dream. It's designed specifically for marketers to streamline content creation, enhance collaboration, and seamlessly distribute campaigns across platforms. Optimizely CMP serves as a hub for marketing assets, from blog posts and articles to videos and images. This centralized platform allows marketers to plan, create, edit, and publish content efficiently, while also tracking performance across channels. By providing a single source of truth for content, Optimizely CMP helps teams collaborate more effectively and enhance brand consistency across communications.

Implementing a tool like Optimizely Content Marketing Platform requires careful planning to ensure a successful and efficient rollout. Before diving into the technical aspects of the platform, it is crucial to have a clear understanding of your content strategy and planning workflows, including defining goals, identifying workstreams and approval requirements, conducting a content audit, and creating a content development process. In addition to content planning and workflow definition, you'll need to review your taxonomy structure and how you want to categorize your content and assets for search, analytics, and collaboration.

STEP 1: AUDIT YOUR CONTENT PROCESS

Optimizely CMP facilitates robust content planning by enabling marketers to structure their efforts around campaigns. These campaigns can encompass a wide range of initiatives, from product launches and seasonal promotions to long-term brand awareness campaigns. Within each campaign, users can use a campaign brief to outline objectives, define target audiences, document key messages, and collaborate on desired outcomes.

This centralized approach ensures that all content aligns with overarching marketing goals and channels.

Optimizely CMP streamlines content planning by breaking down large campaigns into smaller, manageable tasks. These tasks can be assigned to specific team members with clear deadlines and expectations. For example, tasks might include drafting blog posts, creating social media graphics, scheduling email campaigns, or conducting competitor research. By breaking down campaigns into discrete tasks, Optimizely CMP improves project visibility, accountability, and overall efficiency.

Collaboration is critical for effective content planning, and Optimizely CMP provides a robust suite of features to foster teamwork. The platform allows for real-time communication and feedback through built-in messaging and commenting features. Work requests can be easily submitted and tracked, ensuring that all necessary information and approvals are obtained efficiently. Additionally, Optimizely CMP facilitates content reviews and approvals through a clear and transparent workflow, minimizing delays and ensuring that all content meets the highest quality standards before publication.

MAP YOUR WORKFLOWS

Before implementing Optimizely CMP, it's imperative to analyze your existing content processes to properly structure campaigns within the platform. Begin by mapping out your current content creation workflow. Identify all the stages involved, and determine the roles and responsibilities of each team member involved in each stage. This analysis will not only highlight bottlenecks and inefficiencies that can be improved, but it will also define the requirements needed for proper campaign configuration in CMP.
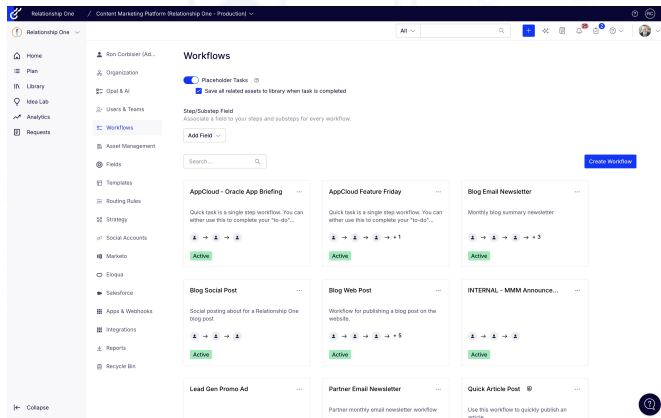
ANALYZE EXISTING CONTENT

Next, analyze your existing content to identify recurring themes, topics, and formats. Group similar content pieces into logical categories, such as blog posts, social media updates, email newsletters, case studies, and webinars. This categorization will help you identify potential campaign themes and structure your content within Optimizely CMP accordingly. For example, you might create a campaign for a new product launch, a seasonal marketing campaign, or a thought leadership series.

REVIEW OPTIMIZELY CMP FEATURE OPTIONS

Finally, consider how you can leverage Optimizely CMP's features to improve your existing content processes. Analyze how you can use the platform's workflow automation capabilities to streamline tasks such as approvals, notifications, and content scheduling. Evaluate how the platform's collaboration features, such as real-time commenting and messaging, can enhance communication and feedback within your team. By carefully analyzing your existing content processes and identifying areas for improvement, you can effectively structure campaigns within Optimizely CMP and maximize its benefits.

STEP 2: DEFINE YOUR WORKFLOWS

Optimizely CMP boasts robust workflow capabilities that streamline content creation and ensure collaboration and proper approval processes when required. CMP even allows marketers to create custom workflows tailored to their specific needs and processes. These workflows can include various stages, such as ideation, writing, editing, approval, and publishing. Work requests can also be created and submitted to kickstart these workflows, providing a central hub for all necessary information. For example, at Relationship One, we

use work requests to submit blog ideas, AppCloud product marketing and announcement requests, and to route general marketing support requests.
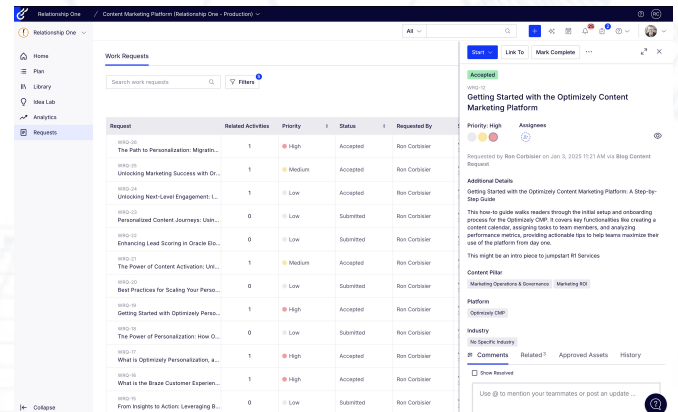
Optimizely CMP enables the creation of custom forms for data collection at different stages of the workflow. This ensures that all necessary information is captured and easily accessible throughout the workflow. Task creation is seamlessly integrated within workflows, allowing for the assignment of specific tasks to individual team members with clear deadlines and expectations.

Optimizely CMP supports template-based workflows, enabling teams to quickly create and replicate recurring tasks. This significantly reduces manual effort and ensures consistency across different projects. For instance, a template can be created for the standard blog post workflow, which can be replicated for all future blog projects. This streamlined approach not only saves time and effort, but also minimizes the risk of errors and ensures content meets quality standards and brand guidelines.
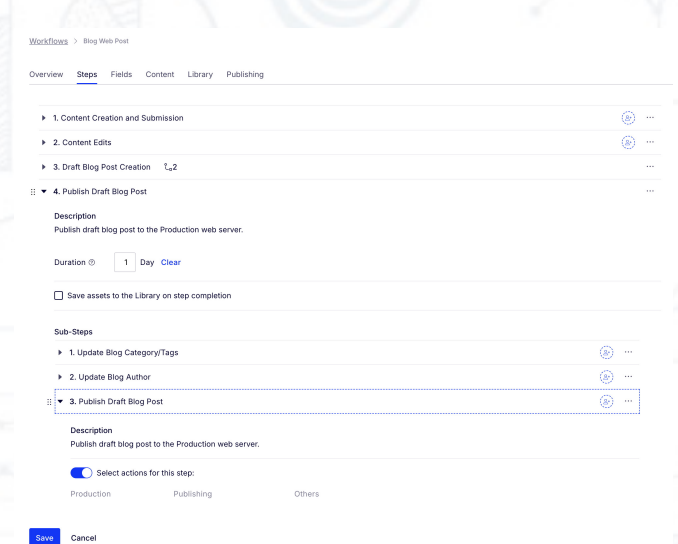
As you begin to plan for your CMP implementation, you will need to audit and refine your existing content and campaign workflows. This involves a thorough examination of every step in the process, from initial ideation to final publication and distribution.

Start by mapping out your current workflows, including all the stages involved, such as:

○ **Ideation & Planning:** Brainstorming, research, content briefs, target audience definition, campaign goals.
○ **Creation:** Writing, design, video production, asset gathering.
○ **Review & Approval:** Editing, legal review, brand review, stakeholder approvals.
○ **Publishing & Distribution:** Scheduling, publishing to website, social media posting, email campaigns.
○ **Analysis & Optimization:** Tracking key metrics, performance analysis, content repurposing.

Involve all key stakeholders in this audit, including content writers, editors, designers, marketers, legal teams, and any other relevant departments. This ensures everyone understands the current process, identifies potential bottlenecks, and provides valuable input for improvement.

Pay close attention to your approval processes. Are they efficient? Are there any unnecessary delays? Identify areas where automation can streamline approvals, such as automated notifications, reminders, and approval routing. Explore the use of digital proofing tools within the workflow to facilitate faster and more efficient feedback.

By carefully analyzing your current workflows and identifying areas for improvement, you can ensure that your Optimizely CMP implementation maximizes efficiency and minimizes bottlenecks.

STEP 3: PLAN YOUR TAXONOMY STRUCTURE

Optimizely CMP leverages a robust taxonomy structure to organize and categorize content. This includes a combination of fields and labels to create a structured framework for content discovery and retrieval.

Fields are custom attributes that can be added to content items, such as "Author," "Publication Date," "Product Category," or "Target Audience." These fields provide structured metadata

that can be used to filter, search, and analyze content. For example, a marketer can easily find all blog posts written by a specific author or all content related to a particular product line.

Labels, on the other hand, are flexible tags that can be applied to content to categorize it in a more free-flowing and descriptive manner. For instance, a blog post about "The Future of AI" might be labeled with "Artificial Intelligence," "Technology," "Innovation," and "Future Trends." This combination of fields and labels provides a multifaceted approach to content categorization, enabling marketers to easily find and utilize relevant content across their organization.

Building a robust taxonomy within Optimizely CMP requires careful planning and consideration. Begin by conducting a thorough analysis of your existing content, identifying key themes, topics, and audience segments. This will help you determine the core categories and subcategories that will form the foundation of your taxonomy.

Next, consider the specific needs and information-seeking behaviors of your target audience. What terms and phrases do they use to describe your products and services? How do they typically search for information? By understanding your audience's perspective, you can create a taxonomy that is intuitive and easy for them to navigate.

Involve key stakeholders from across your organization in the taxonomy development process. This ensures that the taxonomy reflects the needs and perspectives of all relevant teams, including marketing, sales, customer service, and product development. Collaboratively brainstorm and refine the taxonomy structure, ensuring that it is comprehensive, flexible, and adaptable to future needs.

As you are building your taxonomy, you'll want to define content categories, keywords, and metadata fields. Create a hierarchical structure of categories and subcategories to organize your content. Identify relevant keywords for each piece of content and use them consistently throughout your content and taxonomy. Determine the metadata fields that will be used to describe and define your content and the tags (labels) needed to properly categorize them.

Finally, regularly review and refine your taxonomy to ensure that it remains relevant and effective. As your content strategy evolves and your business grows, you may need to add new categories, adjust existing ones, or introduce new fields and labels. By continuously evaluating and refining your taxonomy, you can ensure that your content remains well-organized, easily discoverable, and readily accessible to your audience.

PREPARING FOR YOUR IMPLEMENTATION

Now that you've thoroughly audited, refined, and documented your key campaign requirements, workflow processes, and taxonomy structure, you're ready to move into implementation. With all of this preparation complete,

everyone involved has a shared understanding of the goals objectives, and expectations for the platform. This shared understanding minimizes confusion and miscommunication, leading to a smoother and more efficient implementation. Plus, documented processes and requirements serve as a valuable roadmap throughout the implementation process. They provide a clear framework for decision-making, help identify potential challenges, and ensure that the implementation stays on track and delivers the desired outcomes.

Furthermore, documented processes and requirements facilitate ongoing maintenance and improvement. They serve as a reference point for future updates, upgrades, and modifications. By regularly reviewing and updating these documents, organizations can ensure that their use of Optimizely CMP remains aligned with their evolving business needs and objectives. Thorough documentation lays the foundation for a successful and sustainable Optimizely CMP implementation.

CHAPTER 3:
IMPLEMENTING THE OPTIMIZELY CONTENT MARKETING PLATFORM – BASIC SETTINGS

Now that you've meticulously planned for your Optimizely Content Marketing Platform (CMP) implementation, you're poised to unlock its full potential. Remember, investing time upfront in a thorough audit of your current campaign processes, content workflows, and categorization methodology will lay a strong foundation for a seamless and successful implementation.

The discovery phase is paramount. It's your opportunity to define clear objectives and ensure that CMP perfectly aligns with your overarching content strategy. A well-defined content workflow and architecture, including a robust taxonomy and metadata strategy, are crucial for effectively organizing and managing your content within the platform. This structured approach will empower you to find, repurpose, and analyze your content assets.

With a comprehensive understanding of your requirements and a well-defined implementation plan, you'll be equipped to confidently configure the platform and seamlessly integrate it with your existing marketing technologies. This proactive approach will not only save you valuable time and resources during implementation, but also ensure a smooth and efficient transition. By prioritizing thorough planning and a phased approach, you'll be well-positioned to maximize the benefits of Optimizely CMP and achieve your content marketing goals with greater speed and agility. Now, it's time to get our hands on the keyboard.

PREPARING FOR CONFIGURATION

Implementing Optimizely CMP is an exciting journey that empowers your team to streamline content workflows and achieve greater marketing success. To ensure a smooth and successful implementation, careful consideration must be given to several key areas.

Start by establishing a robust foundation within the platform. Define a clear organizational structure that mirrors your team's needs. Carefully define user roles and permissions to ensure the right individuals have access to the appropriate tools and information. Configure workflows to efficiently guide content through the creation and approval process, ensuring timely delivery and maintaining high quality.

A well-defined taxonomy and metadata structure is crucial for organizing and easily finding your content. This enables you to quickly search, filter, and report on your assets, gaining valuable insights into your content performance. Create templates for different content types to streamline the creation process and ensure consistency across all channels.

Integrate Optimizely CMP with your existing marketing technology stack, such as your CRM and analytics platforms. This seamless data flow provides valuable insights into audience behavior and campaign performance, allowing you to make data-driven decisions and optimize your content strategy.

Collaboration is key to a successful implementation. Involve content strategists to define the taxonomy, metadata structure, and content calendar. Leverage the expertise of consultants or technical teams for initial setup, integrations, and ongoing platform maintenance. Marketing operations and project managers play a vital role in overseeing the implementation process, ensuring it stays on track and within budget.

Invest in thorough training for your content creators and editors, empowering them to effectively utilize the platform's features, create content using templates, and participate smoothly in workflows. Keep your executive sponsors informed of the progress and the tangible benefits of the implementation, showcasing the value of this investment.

With careful planning, effective collaboration, and a focus on continuous improvement, you're ready to unlock the full potential of Optimizely CMP. This powerful platform will empower your team to create exceptional content, deliver it seamlessly across all channels, and achieve your marketing goals with greater speed and agility. Let's dive deeper into some of the specifics.

SETUP YOUR ORGANIZATIONAL SETTINGS

Within Optimizely CMP's organizational settings, several key configurations are necessary to establish a foundation for effective content marketing operations. The General tab includes fundamental settings like the organization's name, default region, language preferences, and other important features. For example, you will see options related to campaign and content settings that impact various aspects of the platform.
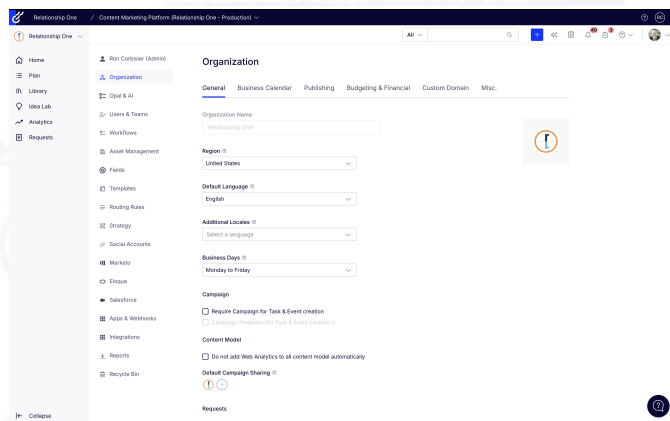
Organizational settings also include options for managing business calendars, budgeting, and custom domains. The business calendar tab allows you to define working days, holidays, and other non-working periods that affect content scheduling and workflow management. This ensures that deadlines and timelines are realistic and account for any planned time off. The budgeting tab, enables you to set up and manage budgets for different content initiatives or campaigns. By configuring these aspects of organizational settings, you gain better control over resource allocation, scheduling, and financial planning related to your content marketing efforts.

Custom domains within Optimizely CMP allow you to brand your content and present a consistent online presence to your audience. First, you'll need to decide on the subdomain or domain you want to use (e.g., content.relationshipone.com). Then, you will need to ensure that your subdomain is properly

configured to work within CMP. Once everything is set up correctly, your content hosted within Optimizely CMP can be accessed and shared using your custom domain.

Using a custom domain offers several advantages. It enhances brand recognition and builds trust with your audience, as they'll see your familiar domain name associated with your content. A custom domain also provides a more professional and seamless user experience, as it integrates your content more naturally into your overall online presence. Furthermore, using your own domain can have SEO benefits, as it allows you to build authority and link equity on your primary domain, potentially improving your search engine rankings. By properly configuring and utilizing custom domains, you can leverage Optimizely CMP to deliver a branded and engaging content experience that aligns with your overall marketing strategy.

CONFIGURE YOUR USERS AND ROLES

Managing users and roles within Optimizely CMP is crucial for controlling access to the platform and ensuring efficient collaboration among team members. The configuration process involves creating user accounts and assigning them specific roles based on their responsibilities and required level of access. Administrators have the ability to create new users, modify existing user profiles, and manage role assignments. When creating a user, you'll need to provide information such as their name, email address, and role (to grant them the necessary permissions within the platform).

Optimizely CMP comes with a set of standard roles designed to cover common user responsibilities. These include roles such as Administrator, Creator, Collaborator, Collaborator+, and Guest, among others. The Administrator role has full access to all features and settings within the platform, including user management, configuration, and reporting. Creators have access to all platform areas, and they are able to create new campaigns, tasks, and events. Collaborators have stricter access, and they can only view and collaborate on campaigns and tasks shared or assigned to them. Collaborators+ have additional access than standard Collaborators, including access to areas such as Idea Lab, Calendar, and Library, and they have the ability to upload directly to the Library. Guests have restricted access and can only access requests from the navigational panel.

In addition to standard roles, Optimizely CMP allows you to create custom roles that meet your specific organizational needs. This gives you the flexibility to define very specific sets of permissions tailored to particular job functions or workflows. By combining standard and custom roles, you can effectively manage user access and permissions within Optimizely CMP, ensuring that everyone has the right level of access to contribute to your content marketing success.

DEFINE YOUR FIELDS, LABELS, AND TAXONOMY STRUCTURE

A critical aspect of setting up Optimizely CMP is establishing a well-defined taxonomy. Taxonomy refers to the structured classification of your content, using fields and labels for organization and easy searching. A robust taxonomy is essential for content discoverability, both internally for your team and externally for your audience. This process involves identifying the key themes, topics, and attributes relevant to your content. For instance, an e-commerce company selling apparel might categorize content by product type (shirts, pants, dresses) and style (casual, formal, athletic). Implementing a consistent taxonomy ensures that content is easily findable within the platform and improves search engine optimization (SEO) by providing clear signals to search engines about the content's subject matter.

When building your taxonomy structure, it's important to keep in mind the difference between fields and labels (labels are a field type). Within Optimizely CMP, fields and labels play crucial roles in organizing and categorizing content, tasks, and campaigns. Fields are structured data points that provide specific information about an item, such as "Author," "Project," "Due Date," and "Budget." They act as containers for metadata, allowing for the collection and storage of precise details. Fields can be of various types, including text, number, date, dropdown, and checkbox, enabling the collection of data in specific formats. This structured approach allows for powerful filtering, sorting, and reporting capabilities, as data can be easily queried and analyzed based on specific field values.

Labels, on the other hand, are less structured and more flexible. They are simple tags or keywords assigned to items for broader categorization and quick filtering. For example, a blog post might be labeled with "SEO," "Social Media," and "Marketing." Labels are ideal for general categorization and grouping of items based on overarching themes. While less structured than fields, labels provide valuable organizational benefits, allowing for easy identification and filtering of items based on shared

characteristics. By effectively utilizing both fields and labels, users can create a well-organized and efficient workflow within Optimizely CMP, improving content management, collaboration, and overall productivity.

STRUCTURE YOUR WORKFLOWS AND ROUTING RULES

Within Optimizely CMP, workflows and routing rules are powerful tools for automating and streamlining content creation and approval processes. Workflows define a series of sequential steps that content must pass through before it's published. These steps can include tasks like drafting, editing, legal review, and approval. Each step can be assigned to specific team members or roles, ensuring that content is reviewed and approved by the appropriate individuals. Workflows can be customized to fit the specific needs of different content types and teams, ensuring that all content follows a consistent and efficient approval process.

Routing rules, on the other hand, determine how content is assigned to specific team members or groups based on predefined criteria. For example, a routing rule can automatically assign blog posts to the editorial team, while website updates are routed to the web development team. Routing rules can be based on various factors, such as content type, author, or specific field values.

The relationship between workflows and routing rules is synergistic. Routing rules can be integrated into workflows to automate the assignment of tasks at specific stages. For example, a workflow for blog posts might include a step for "Editorial Review." A routing rule could be configured to automatically assign blog posts to the appropriate editor based on the post's topic or target audience. This integration streamlines the workflow and ensures that content is efficiently routed to the correct individuals.

In structuring workflows, it's crucial to clearly define the necessary steps and their order. Consider factors such as the complexity of the content, the number of stakeholders involved, and the desired level of control. Break down the workflow into manageable stages and assign clear deadlines for each step. Routing rules should be carefully defined based on the specific needs of your team and the types of content you create. Consider factors such as content type, urgency, and the skills and expertise of your team members.

Within Optimizely CMP, work requests and forms are also beneficial for managing requests from various departments and teams, and they can be built into your workflows. Once a work request is submitted, it can be integrated into existing workflows or trigger the creation of new ones. For example, a website update request might trigger a workflow involving design, development, and QA testing. This integration ensures that ad-hoc requests are handled efficiently and consistently within the overall content management process, maintaining order and preventing bottlenecks.

BUILD YOUR CAMPAIGNS

Campaigns and tasks are core components within Optimizely CMP for organizing and executing marketing initiatives. Campaigns represent overarching marketing efforts with defined goals and objectives, such as a "Summer Sale" or "New Product Launch." They act as containers for managing all related activities and resources. Tasks, on the other hand, are the individual action items that contribute to the campaign's success. These smaller, more specific activities, such as "Write blog post" or "Design social media graphics," are essential for achieving the campaign's objectives. Campaigns and tasks have a hierarchical relationship, with campaigns encompassing a collection of related tasks. This structure allows for efficient planning and execution of marketing projects, ensuring that all activities contribute to the overall campaign goals.

To create a campaign, begin by defining clear goals and objectives. Identify the key activities required to achieve these goals, which will form the basis for your tasks. Within Optimizely CMP, create a new campaign and provide a descriptive name and a brief description. Subsequently, add individual tasks within the campaign, assigning them to specific team members and setting deadlines. Throughout the campaign, monitor the progress of each task, identify any roadblocks, and make necessary adjustments. Upon completion, analyze the campaign's results to evaluate its effectiveness and identify areas for improvement.

Creating campaign templates can significantly streamline the campaign creation process. To create a template, develop a sample campaign that represents a typical workflow for a specific campaign type, such as a product launch. Define the template name, description, and any default settings, such as task assignments and deadlines. Save this sample campaign as a template within Optimizely CMP. By utilizing these templates, you can quickly create new campaigns based on proven structures, ensuring consistency and efficiency across your marketing efforts.

GET READY TO PUBLISH

The publishing feature within Optimizely CMP streamlines the process of delivering content to various channels. It allows you to publish content directly from the CMP to your website, social media platforms, and other destinations. This centralized approach eliminates the need for manual exporting and importing of content, saving time and reducing the risk of errors.
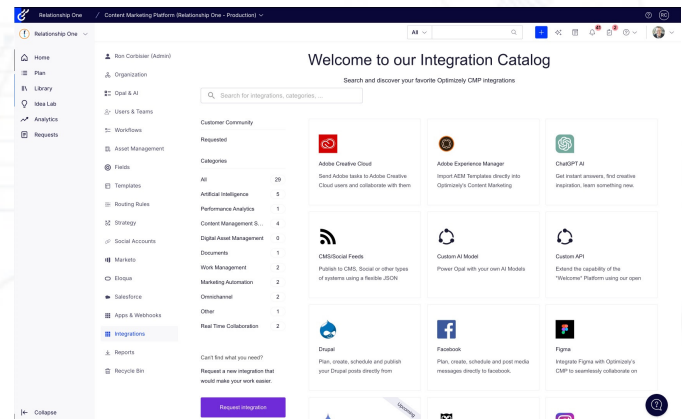
To connect various technologies, Optimizely CMP offers integrations with a wide range of platforms, including CMS systems like WordPress and Drupal, social media platforms like Facebook and Twitter, and email marketing platforms such as Adobe Marketo. These integrations enable you to publish content directly to these tools from within the CMP interface. For example, you can publish a blog post to your WordPress site with a single click, ensuring that the content is published consistently and accurately across all channels. Every publishing channel has different requirements for integration and capabilities, so plan ahead to keep your implementation seamless.

By leveraging the publishing features within Optimizely CMP, you can streamline your content workflow, improve efficiency, and ensure that your content is delivered to the right audiences at the right time.

CHAPTER 4:
IMPLEMENTING THE OPTIMIZELY CONTENT MARKETING PLATFORM – ADVANCED FEATURES

As with any new technology, it's important to follow the "crawl, walk, run" methodology when adopting Optimizely Content Marketing Platform (CMP). As we have seen throughout our series, this phased approach ensures a gradual and successful implementation, maximizing the platform's value and minimizing potential roadblocks.

The initial "crawl" phase focuses on building a strong foundation. Teams should familiarize themselves with the Optimizely CMP interface, grasp core functionalities like content brief creation, and establish basic workflows. During this phase, it's essential to ensure all team members understand the core components of the platform from campaign planning to general processes, fostering a shared understanding and minimizing confusion.

The "walk" phase involves putting the learned fundamentals into action. Teams can begin executing real campaigns, using Optimizely CMP to guide their efforts. This phase emphasizes refining workflows based on initial feedback and integrating the platform seamlessly into existing content creation processes. By actively using the platform and demonstrating its value through tangible results, teams can build momentum and gain support from stakeholders.

Finally, the "run" phase leverages the advanced capabilities of Optimizely CMP. Teams can explore sophisticated analytics and reporting features, implement personalized content delivery strategies, and integrate the platform with other marketing automation tools. This phase is about continuous improvement and pushing the boundaries of what's possible with the platform. Just as a runner wouldn't begin with a marathon, teams should avoid trying to implement every feature of Optimizely CMP at once. By following the "crawl, walk, run" approach, teams can ensure a smooth and

successful implementation, maximizing the platform's potential and achieving their content marketing objectives.

Now that you have implemented Optimizely CMP, and your team is masterfully using campaigns, workflows, and templates you've built, let's explore a few advanced features to truly maximize your tool's capabilities.

LIBRARY

Optimizely's Library and Digital Asset Management (DAM) system serves as a centralized hub for marketers to store, organize, and manage all their digital assets. This includes everything from images and videos to documents, ensuring easy access and consistent usage across campaigns. A key benefit of this centralized approach is improved efficiency. Marketers no longer need to hunt for assets across different locations, saving valuable time and effort. The Library also supports version control, preventing the use of outdated or incorrect assets. This contributes to brand consistency and reduces the risk of errors in marketing materials.
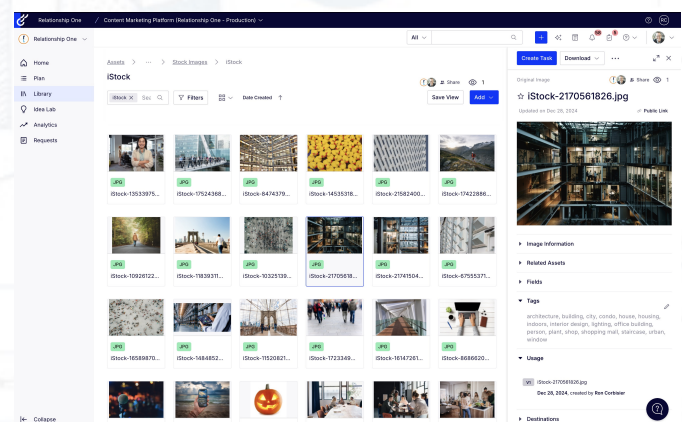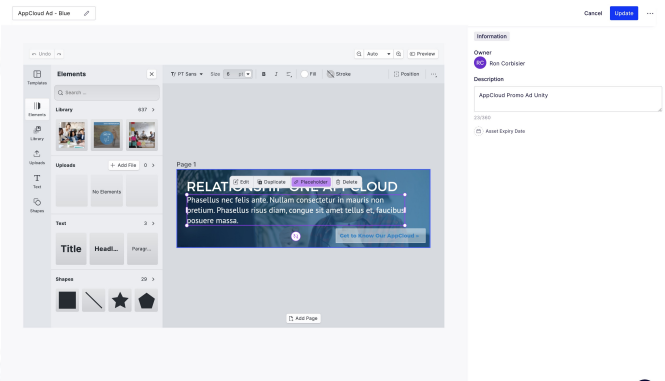
Key capabilities of Optimizely's Library include robust search functionality, allowing marketers to quickly find the assets they need using keywords, tags, and metadata. The system also supports collaboration, enabling teams to share assets and work together on projects seamlessly. Optimizely CMP's image and video rendition feature automates the creation of different versions of your digital assets, optimizing them for various platforms and devices. By defining presets for size, format, and quality, you can generate renditions tailored to specific needs (e.g., website, social media, email). This improves website performance, reduces bandwidth usage, enhances visual quality, and streamlines workflows by eliminating manual editing.

Granular permissions control who can access, edit, and download specific assets, ensuring security and compliance. Furthermore, the Library integrates directly with the Optimizely platform, making it easy to incorporate assets into personalization campaigns and other marketing activities. This tight integration streamlines the workflow and reduces the risk of errors associated with manual asset handling.

Marketers configure and use Optimizely's Library by first uploading their digital assets to the platform. They can then organize these assets into folders and add metadata, tags, and descriptions to make them easily searchable. User roles and permissions are configured to control access to different assets and folders. When creating marketing campaigns or experiments, marketers can then browse the Library directly from within the Optimizely platform to select the appropriate assets.

Furthermore, Optimizely CMP allows for the creation of "brand templates," which are specifically designed to enforce brand guidelines. These templates can restrict certain elements, such as fonts, colors, and logos, ensuring that all content adheres to the brand's visual identity. This not only saves time and effort for designers but also helps maintain brand consistency across all marketing materials, enhancing brand recognition and strengthening brand equity.

By leveraging templates and brand templates within Optimizely CMP, marketers can significantly improve their content creation workflow, enhance brand consistency, and ultimately achieve more impactful marketing results.

BRAND TEMPLATES

Optimizely CMP empowers marketers to streamline content creation and ensure brand consistency through the use of templates. These pre-designed layouts act as blueprints, providing a framework for various content formats such as social media posts, blog graphics, presentations, and more. By utilizing templates, marketers can quickly create visually appealing and on-brand content while maintaining consistency across all channels.

INTEGRATIONS

Optimizely CMP boasts robust integration capabilities, enabling seamless data flow and enhanced workflow efficiency across various marketing platforms. Key integrations include marketing automation tools like Eloqua and Marketo as well as CRM tools like Salesforce. This allows marketers to track content performance, understand audience behavior, and make data-driven decisions. With a Salesforce CRM integration, marketers can even begin to see how content impacts closed-won opportunities, fine-tuning their attribution models.

Optimizely CMP also integrates seamlessly with leading content management systems (CMS) such as WordPress and Drupal. This integration streamlines content publishing workflows, enabling marketers to easily transfer approved content from Optimizely CMP directly to their website or other digital channels. This eliminates manual data entry and reduces the risk of errors, ensuring a smooth and efficient content delivery process.

Marketers can also utilize Optimizely CMP integrations with social media and online platforms like Instagram, YouTube, and LinkedIn. These integrations allow marketers to easily schedule and publish social media posts directly from within the platform, saving time and effort. Additionally, these integrations can provide valuable data on social media engagement, enabling marketers to track the performance of their social media campaigns and refine their strategies accordingly.

IDEA LAB

Optimizely's Idea Lab is a powerful tool within Content Marketing Platform (CMP) designed to help marketers discover and create content that resonates with their target audience. It leverages SEO and social sharing information to provide valuable recommendations and insights. By analyzing search volume, cost-per-click, and keyword ranking, Idea Lab helps marketers identify high-opportunity keywords and topics that are likely to perform well in search results. This data-driven approach allows marketers to focus their efforts on creating content that has the greatest potential for visibility and engagement

One of the key capabilities of Idea Lab is its ability to provide marketers with a comprehensive view of their competitive landscape. By analyzing competitor domains, marketers can gain insights into their content strategy, identify areas of opportunity, and discover potential content gaps. This information can be used to inform content creation and ensure that the content being produced is unique, valuable, and

likely to outperform the competition. Additionally, Idea Lab offers a range of features to help marketers streamline their content creation process, including the ability to save research in a notepad or download the data in an Excel spreadsheet or as a PDF.

Marketers can configure and use Idea Lab by first setting their targeted keywords within the platform. This allows Idea Lab to generate recommendations for additional keywords that offer the best opportunity to rank higher in searches and drive traffic. Marketers can then explore these keyword options, research topics, and analyze competitor domains to inform their content strategy. By leveraging the power of Idea Lab, marketers can create a content strategy that is not only effective, but also aligned with their overall business objectives.

ANALYTICS

Optimizely Content Marketing Platform (CMP) provides robust analytics capabilities that empower marketers to track and measure the performance of their content across various channels. The Analytics section within CMP offers a comprehensive view of content performance, including key metrics such as page views, time on page, bounce rates, and conversion rates. This data helps identify high-performing content and pinpoint areas for improvement. By tracking the performance of entire campaigns, including social media, email, and paid advertising, marketers can identify the most effective channels and allocate resources accordingly.

Furthermore, Optimizely CMP enables you to measure the performance of your content across various channels, including website, social media, email, and paid advertising. This holistic view allows you to identify the most effective channels for reaching your target audience and optimize your resource allocation accordingly. The platform also empowers you to measure the ROI of your content marketing efforts by tracking key metrics such as leads generated, sales conversions, and customer lifetime value.

Finally, Optimizely CMP provides advanced analytics capabilities, such as measuring average attention time, engagement rate, and scroll depth. These metrics offer valuable insights into how effectively your content is capturing and holding audience attention. You can also generate comprehensive reports on campaign performance, providing a clear overview of your content marketing successes and identifying areas for improvement. By leveraging these powerful analytics features, you can make data-driven decisions to optimize your content strategy and maximize the impact of your marketing efforts.

WRAPPING THINGS UP

OPTIMIZELY CONTENT MARKETING PLATFORM (CMP)

Optimizely CMP offers a powerful suite of tools for content marketers, enabling them to streamline workflows, enhance collaboration, and deliver high-quality content that resonates with their target audience. By embracing the "crawl, walk, run" approach, teams can effectively implement the platform and maximize its potential. Utilizing the most advanced features of CMP, such as Integrations, Analytics, Idea Lab, and the Library, give marketers the ability to make data-driven decisions and continuously optimize their strategies. Optimizely CMP is a valuable asset for any organization seeking to elevate its content marketing efforts and achieve its business objectives.