

PROCESS MAKES PERFECT

Creating investment-grade thought-leadership content in financial services starts with having a rock-solid process. Here are the steps we recommend you use for your next thought-leadership project.

CREATIVE BRIEF

The creative brief articulates the vision of what you want to achieve and establishes a roadmap for how you'll get there. This one-page document should state the project's goals, target audience, action you want the target audience to take, scope of the final deliverable, input materials, subject-matter experts, steps in the process, timeline, and anything else you think is important for the project's success.

INVESTMENT-GRADE TIP:
Explore the target audience's psyche by listing any misconceptions, common questions, or pain points they have about the topic.



INTERVIEWS

INVESTMENT-GRADE TIP:
SMEs should provide bullet points of their main ideas and any background research they've assembled to the writer before the call; this allows the writer to prepare for the interview and focus the questions on the most meaningful aspects.

The subject-matter experts (SMEs) are the people whose expertise is being showcased in the thought leadership. Whether it's a single portfolio manager or a team of investment professionals, SME interviews are where you identify the "angle" for the story and gather most of the inputs.



INPUT GATHERING

While interviews with the SMEs should provide most of the inputs for any thought-leadership content, there are likely additional materials that will be needed to "fill in the gaps." These may include existing marketing materials on the topic, previously written articles or white papers, or data sets supporting the SME's investment thesis.

INVESTMENT-GRADE TIP:
Find articles that other firms have written on the topic and identify ways that their content misses some important details or provides a starting point for your firm to advance the conversation.



BRAINSTORM AND OUTLINE

INVESTMENT-GRADE TIP:
Ask the SMEs to review your outline before you begin writing a first draft; this will make sure you're not headed down the wrong path.

Once you have all the inputs, don't rush to start writing. Instead, review the materials to identify any themes, quotes, details, examples, or other nuggets you may want to include. After you've finished brainstorming, create an outline that organizes these items in a way that leads the reader to the vision laid out in the creative brief. The more effort and detail you put into the outline on the front end, the better you'll be able to focus on crafting clear, compelling sentences once you get to the writing stage.



FIRST DRAFT

With a detailed outline in hand, block off large chunks of time to focus on writing. Don't try to find 15 minutes here and there to squeeze in time at your computer. Writing is a task that requires intense concentration, so make sure you're eliminating distractions by closing your email and social media and finding a place to work where you won't be interrupted.

INVESTMENT-GRADE TIP:
Try to get your initial draft as close to 100% as possible, but understand that another set of eyes will help ensure that it reads clearly and accomplishes the project's goals.



EDIT

INVESTMENT-GRADE TIP:
To help with "version control," have a system for naming your files during the editing process. We recommend naming George Washington's first draft as "1GW," John Adams' edits as "2JA," Thomas Jefferson's edits as "3TJ," and so forth.

Your goal should be to hit a home run with your first draft. But you'll often fall short—and that's OK. The editing process is a chance to refine and strengthen the content. In addition to having the SMEs review the content to make sure it accurately conveys their ideas, it's also important to have a separate, independent set of eyes give it a final proofread to look for typos or inadvertent errors that may have occurred during the editing process.



DESIGN

The design phase shouldn't be viewed as an afterthought. Quality design is about much more than simply applying the firm's logo, colors, and fonts. A good designer is able to lay out the content in a way that brings the ideas to life and makes it easier for the reader to grasp the most important ideas.

INVESTMENT-GRADE TIP:
Don't wait until this step to let the designers know about the project. Loop them in once the creative brief has been completed so they can start thinking about ways to make the ideas come to life visually.



DISTRIBUTION

INVESTMENT-GRADE TIP:
Rather than trying to be on every social media platform, focus your energy on the one that's most important to your target audience. For most B2B content, LinkedIn will be much more fruitful than Twitter or Facebook.

All your efforts will be for naught if your thought leadership doesn't reach its intended audience. Besides simply putting the content on your website and sending it out via email, develop a nuanced understanding of where your target audience spends its time online and distribute your thought-leadership content through the appropriate mediums. In your thought-leadership media, your distribution strategy may include trade publications, conferences, and podcasts.



REVIEW

Once you've published your thought leadership and executed your distribution strategy, it's tempting to turn your attention to the next project. But you're not done yet. In addition to monitoring key performance metrics to evaluate how your content is performing from a quantitative perspective, gather qualitative feedback from your target audience and the SMEs.

INVESTMENT-GRADE TIP:
Don't just evaluate the quality of the finished product. Evaluate the process you used to create it. Your thought-leadership engine is an ongoing process, so look for ways to make it more efficient.

