Getting Started with Kapost:

The Anatomy of a Rockstar Project Lead

Choosing a solid Project Lead (PL) to implement Kapost can dramatically increase the platform's potential value. To help you choose the right people for the job, we've outlined exactly what makes them great including powerful examples, to help guide your selection.

Tech-Savvy:

They are the kind of person that everyone asks for help. They seem to intuitively understand how things work and can quickly connect technology to solving business problems and have a holistic understanding of your technology stack.

Organizational wherewithal:

They understand how your organization functions. Ideal PLs have a map of how people and process interact with tools and functions. When they don't have the answer, they know who does.

Organized:

They are always aware of dates and details. They are a natural "cat herder," who manages meetings, calls, and trainings with the Kapost success team while also determining what needs to be done to tame the chaos.

Critical thinking skills:

They are able to connect complex thought leadership and marketing strategy to process and people using critical thinking skills. PLs thrive in situations without a clear, singular answer.

Demonstrates high career aspirations:

They view the implementation of the Kapost platform, which aligns marketing strategy, operations, and change management, as a springboard for their career.

Availability:

They have the appropriate bandwidth for executing on the planned implementation. Note: Enterprise companies typically identify a full-time person for implementation and can scale back time after adoption. Smaller, mid-market companies tend to choose a person with other job duties who are able to adjust their given workload as needed.

Holds an experienced marketing title:

Their day-to-day position aligns with the goals and initiatives of the marketing function, including some level of tenured marketing experience.

Project Lead Profile

Name: Kevin Goldberg
Company: AppDynamics
Title: Senior Content Marketing Manager

What key skills do you think helped you with the implementation of Kapost?

Communication and organization. It's important to understand everyones pain point in the content process. Whether it's not enough content, lack of visibility, unsure of efficacy, or simply not having content mapped appropriately by stage, persona, etc. Once you understand the existing issues and how Kapost can address them, you'll need to over-communicate with the various teams to gain department-wide buy-in. Communication is vital to gaining Kapost adoption. Before opening the doors to Kapost, I found it was absolutely necessary to organize the custom fields, workflows, and content types in a logical and intuitive manner. Starting off with a solid foundation will save you a massive headache in the future, so make sure your naming conventions and tags are set up with consistency and scale in mind.

Can you describe the type of additional help you received from other team members?

Make sure you loop in your martech team in from the beginning. You want to make sure Kapost can run seamlessly with your existing tools such as your marketing automation, CMS, CRM, and others. Assuming it's a welcome addition to your martech stack, the extra value will be immediately realized. It's also important to partner with key stakeholders from other teams that fit somewhere in the content process, such as product marketing, sales enablement, digital marketing, and more. These teams often are integral in either content creation or distribution. Getting their support will help with Kapost adoption and overall content marketing success.

Do you have any advice for new Kapost Project Leads?

Given your recent decision-making, I think you'll do great.

Name: Whitney Parker

Title: Senior Director, Global Digital and Strategic Marketing

Company: Kroll

What key skills do you think helped you with the implementation of Kapost?

I'm not sure I would say "skills" but rather oversight of resources and an understanding of your current production processes are critical to getting the system off the ground in a timely way. I also think it's helpful to have a project lead that can pull together the right people for input and tee up decisions for the team without bringing non-technical people too far into the weeds. For instance, you may want to get some input from your team on how long certain steps should ideally take that they are responsible for, but they probably don't need to understand all of the set up involved in making that happen.

Can you describe the type of additional help you received from other team members?

The core implementation team for our project was:

1. Project Lead – Define the scope of the project, implementations and integration priorities, budgeting authority, responsible for internal communication with stakeholders, overall technology owner. Conducted initial group training sessions and post project set up to understand additional requirements and revisions needed to improve success

2. Project Manager – Responsible for organizing daily meetings and working sessions throughout implementation process, coordinating and preparing content uploads, actual setup and configuration based on inputs. This role was played by our Content Marketing and Technology Manager

3. Intern/Assistant – Responsible for data preparation, quality assurance of uploads

4. Our entire global marketing team was involved in vetting and testing the platform to provide input and requirements throughout the process.

Do you have any advice for new Kapost Project Leads?

I met with my project manager for at least an hour a day for several weeks during implementation and scheduled a couple hour working session once per week to ensure that questions were answered and resources were provided when needed. Investing time in the setup and configuration process early on is critical to making sure that the program is picked up and adopted quickly, allowing people to see

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Project Lead Profile

Name: Emily Reynolds
Title: Content Marketing Manager
Company: Phunware

What key skills do you think helped you with the implementation of Kapost?

1. Fanatical attention to detail + foresight: Did we cover everything with this workflow, custom fields, tagging, etc.? Is there consistency across everything? How will the rest of the team be impacted?

2. Diplomacy: Can you train and onboard people, establish expectations, and enforce processes—and still have everyone like you at the end of it?

3. Micro/macro thinking: does this workflow make sense for this particular content type and for our marketing operations as a whole?

Can you describe the type of additional help you received from other team members?

I was lucky enough to have top-down support from our CRO and VP of Marketing—they left the Kapost selection and purchase decision up to me, and they made it known that everyone on the team was expected to learn, and live, Kapost.

My peers all helped in the form of great attitudes and willingness to have an awkward first few days, and I pulled in team members for decision-making if they were going to be impacted by a certain part of the implementation.

Do you have any advice for new Kapost Project Leads?

1. Having trouble getting people out of email and into Kapost? Don't respond to their emails. Paste them into the Activity Feed for the relevant project in Kapost and say "Pasting your email here to keep all communication about this project together. Here's what I think…"

2. Don't try to slow-roll your implementation. Just rip off the Band-Aid. You'll become much more productive much faster that way.

3. Don't be afraid to iterate! If the workflow you set up in your first meeting with your CSM doesn't actually make sense in practice, change it! Keep refining and optimizing as you use the tool.

4. Communicate A LOT. Overshare information until Kapost is up and running to get everyone involved and excited.

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Project Lead Profile

Name: Becky Monk
Title: Digital Marketing Manager
Company: SCIEX

What key skills do you think helped you with the implementation of Kapost?

You can't be afraid to reach out to key people in the content creation process. Having leadership support is key; you need someone on your side that will enforce the changes you're going to make. Also, the initial audit Kapost did on site was integral to success..

Can you describe the type of additional help you received from other team members?

You need to get the content owners in a room to discuss the process the currently use, specifically what works and what doesn't. It's imperative you get constant feedback from your Kapost users.

Do you have any advice for new Kapost Project Leads?

Don't hesitate to get started and change often.

Learn more at: **www.help.kapost.com**