



Template: Multi-Client Content Workflow Setup Checklist

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Based on Article: "Multi-client content workflow (how to set it up)"

Website: <https://scaleblogger.com>

A practical checklist to establish a multi-client content workflow, ensuring smooth processes and clear ownership.

Checklist Items:

- 1. Define Core Workflow Components**
Identify and establish essential components such as a content calendar, brief template, asset library, and approval tool to streamline your workflow.
Reference Section: Core components of a scalable workflow
- 2. Create a Clean Calendar**
Set up a centralized content calendar to plan publish dates, cadence, and content order, ensuring clear visibility for all team members.
Reference Section: Core components of a scalable workflow
- 3. Develop a Content Brief Template**
Design a template that captures key information such as topic, audience, keywords, and acceptance criteria, ensuring everyone's on the same page from the start.
Reference Section: Core components of a scalable workflow
- 4. Establish an Asset Library**
Create a centralized location for storing drafts, images, videos, and final exports to maintain organization and easy access for the team.
Reference Section: Core components of a scalable workflow
- 5. Set Approval Processes**
Define clear approval stages, including named approvers and due dates, to avoid last-minute confusion and ensure accountability.
Reference Section: Core components of a scalable workflow
- 6. Implement Automation Tools**
Utilize platforms like Zapier to automate task creation from intake forms, reducing manual setup and creating a smooth workflow.
Reference Section: Core components of a scalable workflow
- 7. Pilot the Workflow with a Small Client Set**
Test the established workflow with a limited number of clients to identify issues and refine processes before full rollout.
Reference Section: Step-by-step setup: from pilot to full roll-out

8. Monitor Performance Tracking

Set benchmarks and track performance across clients to identify areas for improvement and consistency in delivery.

Reference Section: Performance tracking and benchmarking across clients

9. Ensure Governance and Client Separation

Establish clear guidelines for client data security and visibility to maintain separation between different client accounts.

Reference Section: Governance, security, and client separation