AGB.org Standard Operating Procedures

Updated as of
JULY 29, 2021

Why do we need Standard Operating Procedures (SOPs) for AGB.org?

- ## To ensure a consistent user experience
  - Visitors to AGB.org need to know what to expect – from what information is provided, to how it is presented, to what the registration process looks like.
  - Consistent user experience results in higher engagement and more conversions.

- ## To maximize exposure for our content and events
  - AGB.org is a platform for promotions. Getting content posted on AGB.org earlier means more impressions in emails, on the custom landing page for members, in search results, etc.

- ## To manage bandwidth
  - Emergencies and last-minute requests happen. However, if every request is made last minute, the marketing and web teams won't have time or resources to support truly urgent needs.

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Quality Control

- AGB.org is one of the most visible manifestations of our brand.
  - The content we post must reflect the quality we promise to our members.

- Editorial Review
  - Every piece of content posted to AGB.org must be reviewed by an AGB editor. This ensures that we are communicating effectively and accurately.

- Brand Consistency
  - The web team must review all content to ensure we are following AGB.org style guides for consistent user experience and brand expression.

- Search Engine Optimization and Browsability
  - Keywords, tags, and metadata ensure users can find content, whether they are searching on our site, using an external search engine, or browsing the Knowledge Center.

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Lead Time and Planning

- ## New Post Development and Publishing – 3 Business Days
  - In general, the web team needs three business days to develop a new post. This means three business days after final, edited content is received. Please note that for toolkits or microsites, ten business days or more may be required. A customized timeline will be provided for new site functionality or page/section redesigns.

- ## Post Updates – 1 Business Day
  - Most standard post updates (such as copy changes, speaker additions, etc.) can be handled within one business day. The web team will alert the content owner as soon as possible if more time is required.

- ## Editorial Review – 2 Additional Days
  - If content has not been reviewed by an AGB editor, this process typically adds two days to the publishing timeline (so a standard post would take five business days rather than three). Please note that longer-form content or editorial deadlines may increase this turnaround time.

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Lead Time and Planning (continued)

- ## Marketing and Promotion
  - Marketing and promotion timelines are separate from AGB.org publishing deadlines:
    - **12 Weeks for Virtual Events** - Webinars, Ask the Expert sessions, and other virtual events require 12 weeks to properly promote. This means the post should go live on AGB.org 12 weeks in advance of the event. 16 weeks for promotion is ideal and will substantially increase visibility. **In order to allow 12 weeks for promotion, the web team needs to receive the request 13 to 14 weeks in advance.**
    - **2+ Weeks for Email Inclusion** - Email planning occurs two weeks or further in advance of a planned communication. If your content is not posted on AGB.org when planning occurs, it will not be considered for inclusion in the next email. Note that other resources may take priority in an upcoming email even if your content is posted within two weeks or longer.
    - **Additional Visibility Options When Providing Longer Lead Times** - Social posts and web pushes are supplemental promotions and require the content to be posted on the website.

- ## AGB.org Pipeline Meeting
  - The web team will host a monthly pipeline meeting. Content owners, web team members, and marketing team members will be invited to review content status, deadlines, and dependencies.

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Lead Time and Planning (continued)

- Dedicated Weeks and Days
  - In order to give content adequate visibility, certain content types have assigned days for various contributing teams.

- Webinars by Month:
  - Programs/Content – week 1
  - Consulting – week 2
  - Sponsors – week 3
  - Consulting – week 4
  - Consulting –week 5 (if needed)

- Blog Posts by Day:
  - Mondays – Consulting
  - Tuesdays – Sponsors
  - Wednesdays – Content/Programs/Henry
  - Thursdays – Sponsors
  - Fridays – Open/Free

Webinar gets first crack at date in week. ATE/P2P build around it. ATE/P2P/ Webinars all housed on webinars@agb.org calendar. One webinar a week preferred. Up to two webinars a week during a consulting week. Foundations are exempt from schedule and given flexibility on timing, unless it is a session for a larger audience. One webinar/ATE/P2P session per day.

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Roles

- Content Owners
  - Create content or manage the development and placement of content/events.

- Editors
  - Review content to ensure clarity, accuracy, and consistency with AGB's style.
    - Anne Powell
    - Amy Davis (amydavis209@gmail.com)

- Web Team
  - Manages the AGB.org domain, developments, and publishing.
    - Megann Clarke
    - Melanie Darrow
    - Adam Levine

- Marketing Team
  - Manages communications and promotion of content and events.
    - Nancy Steelberg
    - Michele Rucker

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Content Publishing Responsibilities

- New Post Development
  - Content owner submits web request form.
  - Web team drafts post and handles SEO and tagging.
  - Web team sends to content owner for review.
  - Web team publishes the post upon approval.

- Post Update
  - Content owner submits [web request form](#).
  - Web team completes and typically publishes edit. Web team alerts marketing team is landing pages, forms, or emails are impacted.
  - Web team alerts content owner that edit is complete and adjusts if necessary.

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Content Publishing Responsibilities – Exceptions

- *Trusteeship* articles and issues
  - Content team drafts and publishes article posts, including tagging.
  - Content team flags featured posts that require a key takeaways section and the web team build/populates.
  - Content team creates the issue post, which populates the Resources by Format page in the Knowledge Center.
  - Content team alerts web team when posts are published. Web team completes SEO and QC.

- Books
  - Standard new post or post update process, but the marketing team posts E-book file to HubSpot and shares URL(s) with the web team.

- Podcasts
  - Content team creates and publishes podcast posts, including SEO and tagging.
  - Web team is available for backup/support if required.

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Content Publishing Responsibilities – Exceptions

- Toolkits Content owners submits web request and final, edited content at least 10 business days before the toolkit is scheduled to go live. If content requires editing, 13 business days are required.
  - Web team builds toolkit, including SEO and tagging.
  - Content owner reviews toolkit and facilitates proofing.
  - Upon content owner approval, web team launches toolkit.

- Institutes/Retreats
  - Content owner asks for a previous post to be cloned and edits content.
  - Web team reviews, completes SEO and tagging, and published post.

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Content Publishing Responsibilities – Exceptions

- Webinars on Demand
    - When an upcoming webinar is published, the web team will make a note of the expiration date and monitor past events.
    - The marketing team will post the video of the completed webinar and alert the web team and any other internal stakeholders.
    - If a follow-up thank you or communication to webinar attendees is required, the content owner will submit a web/marketing request and final, edited content **at least three business days before the communication is scheduled. If content requires editing, five business days are required.**
    - Once the video recording is available, the web team will convert the past even post into a webinar on demand post, publish the post, and alert the content owner. **This may take up to three business days.**

- Webinars and Ask the Expert Sessions
    - The marketing team creates registration landing pages in HubSpot and sends them to the web team for use in the post call to action. **Note this dependency, and why last-minute requests are very difficult to accommodate.**

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Web Request Form

- Please **click here** to submit a web request.

- Note that this form is only available to AGB staff or those with an AGB email address.

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