AGB.org Standard Operating Procedures

Updated as of
MAY 12, 2023

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.

AGB

Table of Contents

- Quality Control
  -

- Lead Time and Planning
  -

- Roles
  -

- Content Publishing Responsibilities
  -

- Web Request Form
  -

AGB

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.

AGB

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.

AGB

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.

AGB

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.

Membership P2Ps / Webinars will be scheduled during Consulting weeks – second and fourth week of the month (given Consulting has two weeks). It's okay if they are on the same day (very minimal cross over in target audience), but not at the same time.

AGB

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

AGB

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.

AGB

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.

AGB

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.

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.**

AGB

Webinar Process by Team - Partnerships

- Department Lead
  - Glory Audette (Partnership Manager)

Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
•Glory sends outlook hold for live online event date/time and point of contact to Rob and Michele for calendaring and scheduling tech checks •Michele adds details to Marketing Trello •Rob adds details to his outlook calendar •Glory adds participant contact details to invitation as confirmed •Glory coordinates with participants to confirm webinar title, description, and additional speakers	•Glory sends online event date, description, title, and speakers to Amy Davis for review	•Glory submits the **web request form** for the online event to the web team •Melanie sets up GTW/Zoom page, shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for online event registration	•Rob coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event) •Rob sends out personalized GTW invitation link to online event participants	•Rob hosts the tech check, uploads any materials (e.g., PPTs) for the online event, and hosts the webinar (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	•Rob (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam •Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website

AGB

Webinar Process by Team - Content

- Department Lead
  - Hisani Stenson (Editorial and Production Coordinator)
  - Doug Goldenberg-Hart (Director of AGB Publications)

Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
• Hisani/Doug sends outlook hold for live online event date/time and point of contact to Rob and Michele for calendaring and scheduling tech check • Michele adds details to Marketing Trello • Rob adds details to his outlook calendar • Hisani/Doug adds participant contact details to invitation as confirmed • Hisani/Doug coordinates with participants to confirm webinar title, description, and additional speakers	• Hisani/Doug sends online event date, description, title, and speakers to Amy Davis for review	• Hisani/Doug submits the **web request form** for the online event to the web team • Melanie sets up GTW/Zoom page, shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for online event registration	• Rob coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event) • Rob sends out personalized GTW invitation link to online event participants	• Rob hosts the tech check and run of show, uploads any materials (e.g., PPTs) for the online event, and hosts the online event (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	• Rob (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam • Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website

AGB

Webinar Process by Team - Programs

- Department Lead
  - Rob Wilson (Programs Coordinator)

Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
• Rob sends outlook hold for live online event date/time and point of contact to Rob and Michele for calendaring and scheduling tech checks • Michele adds details to Marketing Trello • Rob adds details to his outlook calendar • Rob adds participant contact details to invitation as confirmed • Rob coordinates with participants to confirm webinar title, description, and additional speakers	• Rob sends online event date, description, title, and speakers to Amy Davis for review	• Rob submits the **web request form** for the online event to the web team • Melanie sets up GTW/Zoom page, shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for online event registration	• Rob coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event) • Rob sends out personalized GTW invitation link to online event participants	• Rob hosts the tech check, uploads any materials (e.g., PPTs) for the online event, and hosts the webinar (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	• Rob (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam • Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website

AGB

Webinar Process by Team - OnBoard

- **Department Lead**
  - Michele Rucker (Marketing Manager)

Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
•Michele sends outlook hold for live online event date/time and point of contact to Rob and Michele for calendaring and scheduling tech checks	•Michele sends online event date, description, title, and speakers to Amy Davis for review	•Michele submits the **web request form** for the online event to the web team	•Rob coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event)	•Rob hosts the tech check, uploads any materials (e.g., PPTs) for the online event, and hosts the webinar (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	•Rob (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam
•Michele adds details to Marketing Trello		•Melanie sets up GTW/Zoom page, shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for online event registration	•Rob sends out personalized GTW invitation link to online event participants		•Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website
•Rob adds details to his outlook calendar					
•Michele adds participant contact details to invitation as confirmed					
•Michele coordinates with participants to confirm webinar title, description, and additional speakers					

AGB

Webinar Process by Team - Membership (General)

- Department Lead
  - Audrey Young (Senior Director, Membership Experience)
  - Michele Rucker (Marketing Manager)

Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
• Audrey coordinates with Michele available online event dates. • Audrey confirms date/time and communicates to Michele (via Marketing Pipeline meetings and/or email) • Michele posts this on Marketing's Trello calendar and sends an Outlook invitation for the online event to Rob (who then schedules the tech check and saves the date for the online event /production). • Audrey completes the **new online event information form** and submits to Michele. • Michele provides speaker info on Outlook invite for Rob to schedule tech checks.	• Michele sends description info through editing, then submits online event details and edited descriptions via web request form for posting to the web. a. If speaker information comes later, Audrey sends to Michele and Michele submits web request update and includes on Outlook invite to Rob.	• Michele submits the **web request form** for the online event to the web team • Melanie creates Zoom or GTW link and sends to Adam and cc's Rob. • Adam creates registration form and Zapier link so registration info transfers from Hubspot to GTW or Zoom. • Melanie sends draft online event post to Michele for review/approval before publishing. • Melanie sends live link to Michele, Audrey, Rob. • Audrey submits test form on online event post.	• Rob coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event). • Rob sends out personalized GTW invitation link to online event participants	• Rob hosts the tech check, uploads any materials (e.g., PPTs) for the online event, and hosts the webinar (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	• Rob (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam • Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website

AGB

Webinar Process by Team - Membership (Peer-to-Peer)

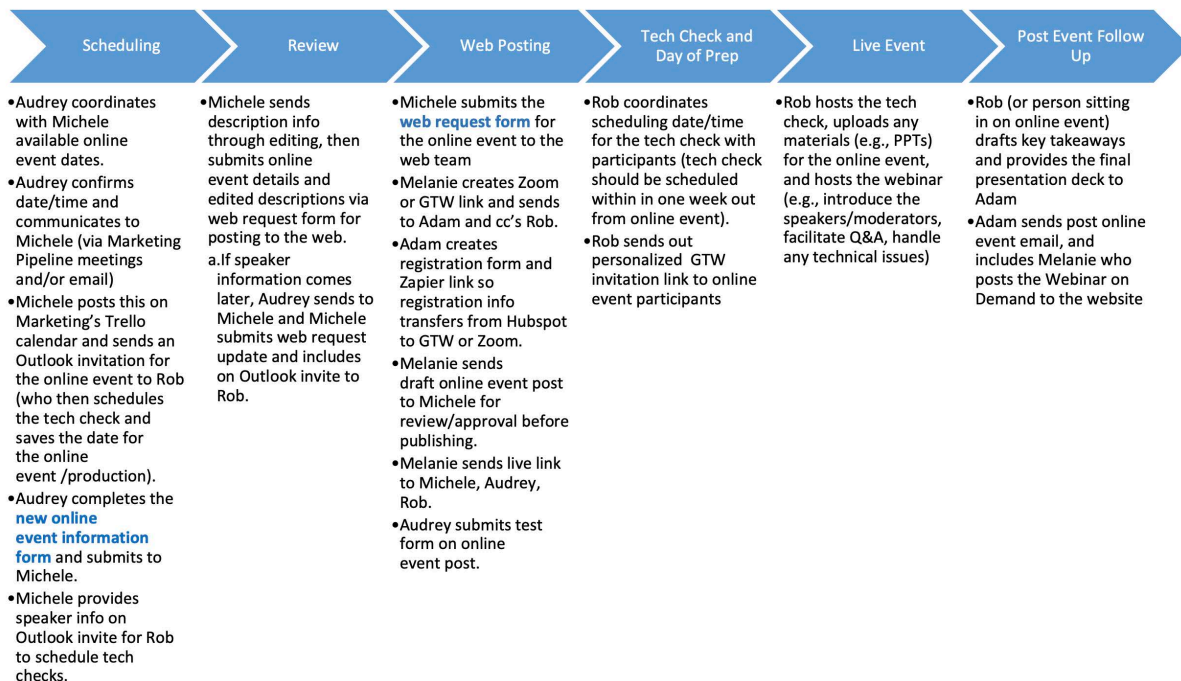- Department Lead
  - Audrey Young (Senior Director, Membership Experience)
  - Michele Rucker (Marketing Manager)

Scheduling	Review	Web Posting	Registrants	Live Event
• Audrey works with Michele to schedule upcoming P2P in the Trello	• Michele sends P2P date, description, title, and speakers to Amy Davis for review	• Michele submits the **web request form** for the P2P to the web team • Melanie sets up GTW/Zoom page, shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for P2P registration	• Katherine receives form fills and manages Zoom invitations	• Audrey hosts the Peer-to-Peer (e.g., introduce the speakers/moderators)

AGB

Webinar Process by Team - Consulting

- ## Department Lead
  - Nancy Steelberg (Marketing Director)
  - Chris Moloney (Senior Director)

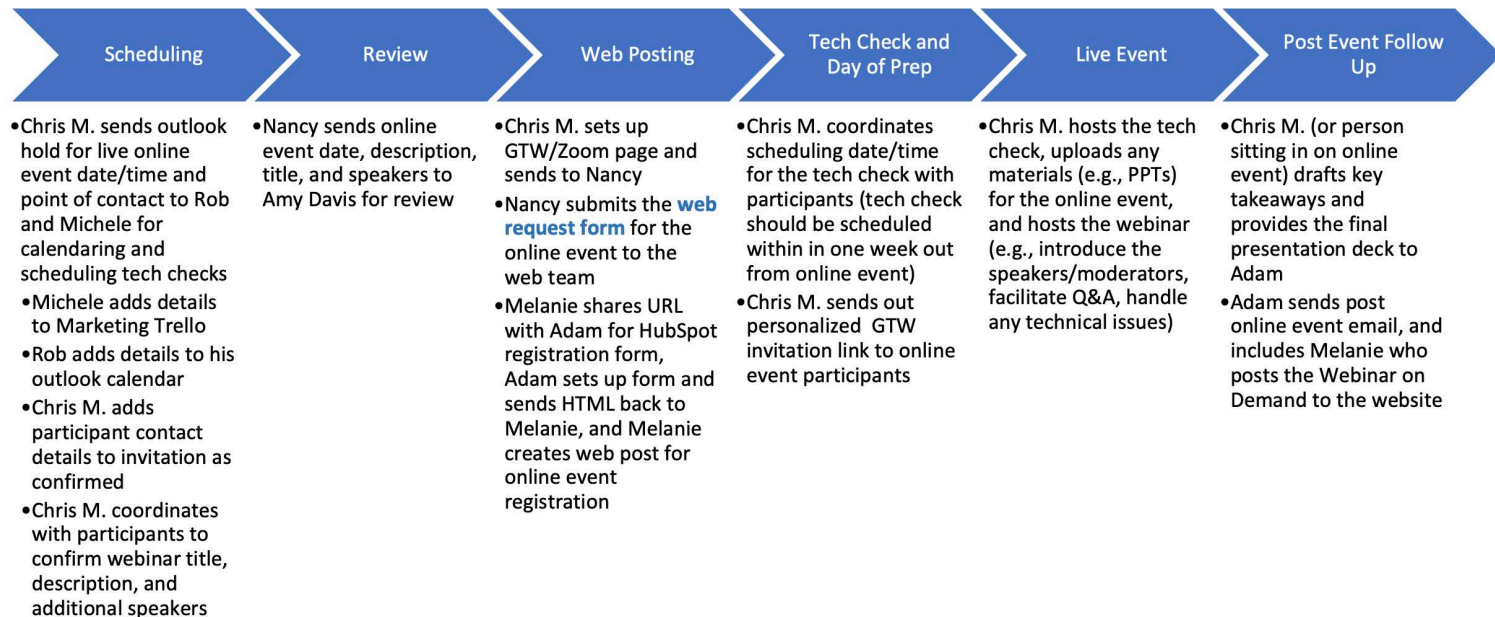| Scheduling	Review	Web Posting	Tech Check and Day of Prep	Live Event	Post Event Follow Up
• Chris M. sends outlook hold for live online event date/time and point of contact to Rob and Michele for calendaring and scheduling tech checks • Michele adds details to Marketing Trello • Rob adds details to his outlook calendar • Chris M. adds participant contact details to invitation as confirmed • Chris M. coordinates with participants to confirm webinar title, description, and additional speakers	• Nancy sends online event date, description, title, and speakers to Amy Davis for review	• Chris M. sets up GTW/Zoom page and sends to Nancy • Nancy submits the **web request form** for the online event to the web team • Melanie shares URL with Adam for HubSpot registration form, Adam sets up form and sends HTML back to Melanie, and Melanie creates web post for online event registration	• Chris M. coordinates scheduling date/time for the tech check with participants (tech check should be scheduled within in one week out from online event) • Chris M. sends out personalized GTW invitation link to online event participants	• Chris M. hosts the tech check, uploads any materials (e.g., PPTs) for the online event, and hosts the webinar (e.g., introduce the speakers/moderators, facilitate Q&A, handle any technical issues)	• Chris M. (or person sitting in on online event) drafts key takeaways and provides the final presentation deck to Adam • Adam sends post online event email, and includes Melanie who posts the Webinar on Demand to the website

AGB

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.

AGB