

HOW TO CREATE A

RESOURCE LIBRARY

SAVE TIME, IMPROVE EFFICIENCIES AND
START LEVERAGING YOUR CONTENT



Creating a resource library will take your business to the next level.

Your library:

- will save you and your team time,
- improve efficiencies,
- leveraging your business assets

IS THIS YOU?

You have information stored on various devices, in various tools and in the heads of your team. This information is valuable and could be leveraged, but you're not sure where to start.

This guide will help you to not only start, but finish your library.



PROBLEMS YOUR RESOURCE LIBRARY

solves

PROBLEM

SOLUTION

You're spending time on tasks you shouldn't be doing yourself.

Easily delegate, outsource or collaborate. Stop yourself getting stuck in the mindset of "it's easier if I just do it myself". A resource library allows for easier delegation and communication throughout your team, wherever they may work from.

Many of your docs are inconsistently formatted meaning your professional brand and communications are not at the standard they should be.

Promote a consistent brand. Consistently branded material means there are no worries about users not knowing where the material came from. All resources look professional, follow your brand guidelines and because of this, it's easy for staff and clients to find what they are looking for within your documentation. It is also an excellent form of 'soft marketing' for your brand.

You've put years into building your blog but old articles are forgotten and under utilised.

Leverage your content and resources by creating a resource library as a lead magnet, bringing prospects into your sales funnel.

PROBLEM

SOLUTION

You're looking at creating an online course and have the info you need, it's just all over the place!

Develop paid and free online courses. Material can be organised in such a way that you can offer levels of access.

You spend too long searching for documents.

One system for all. Having the correct version of all documentation in one place means with a simple search you and your team can find anything, quickly, from anywhere.

You currently have resources spread across your website, your devices, with your team and in various places in the cloud.

You find yourself writing the same emails in response to queries.

Avoid rework and inconsistencies by storing email templates in your library. Accessible for the entire team ensuring consistent communication.

Your team doesn't have access to information when on the road or working remotely.

Easily accessible from wherever you are, on whatever device you're using, making it easy for you to use material on the fly while working with clients. Mobile ready is the way of the future, don't be left behind.

New team members don't have information they need to learn your business.

Use existing IP to easily train and induct new team members, creating an ability to free yourself and existing team faster.

PROBLEM

SOLUTION

Improve your client's experience with access to information you can provide to add value.

Improve your customer service. A resource library allows your team to help your clients more easily when they have questions or need help. The library also saves your staff time as they can easily email links to the relevant document rather than having to type it up from scratch. Spend more time with clients. Easily send useful content to clients, individually or in groups. (Use webinars, group calls and hangouts for delivery of material in conjunction with face-to-face time).

Stand out from your competition.

Add value. Make your customers feel special by giving them something none of your competitors do. Access to resources they can work through in their own time is priceless.

Having all your information documented would be an asset for business to be considered as part of your exit plan.

It's a risk to your business having IP locked in the heads of your team members. Documenting this information is a way to ensure it remains an asset to your business and used to keep systems and processes current.

PROBLEM

You and your team work from different versions of a document.

SOLUTION

Keep your information current. Easily add more material to your resource library from you and others in your team and use document control to eliminate people working from different versions of the same doc.

You find yourself redoing presentations under time pressure, resulting in a less than dynamic delivery.

More dynamic presentations. Presentations or speaking engagements are less stressful with material to draw content from, and you have your library to use for handouts. This gives you more time to prepare your design and delivery, rather than worrying about pulling the content out of your head.

In a nutshell, collating your all business resources in a resource library:

- allows you to add value for your clients
- enables your team work more efficiently
- saves you time (increasing profitability)
- gives you the ability to create online paid products
- can serve as content for lead magnets to attract new clients



YOUR RESOURCE LIBRARY COULD

include

DELIGHT CLIENTS

Onboarding Processes

Event Calendar

Homework / Accountability Templates

Guides

Whitepapers

Workbooks

Tutorials

INTERNAL EFFECIENCIES

Brand Guides

Voice / Tone Guides

Images

SOPs (procedures)

Email Templates

Document Templates

Social Media Templates

CONVERT PROSPECTS

Case Studies

Educational Content

PDF Guides

Webinar Recordings

Reviews

Slide Decks

Free Downloads

eBooks

Interviews

WHERE WILL YOUR LIBRARY

live?

Deciding on a system to use will depend on several factors.

Choose a system your team is already comfortable using if possible and identify the criteria your platform needs to meet.

Think about scalability, will the software you chose now meet future requirements? For example you may want to create a library now for internal use but have a goal to start an online resource later in the year which will be offering paid resources.

Think about security! Whichever system you use, you must have confidence in the fact that your intellectual property is secure and only those who have access can view.

While you want your resource library in the cloud for accessible content wherever you are, think too about ownership:

- Can you back up your resources offline?
- Can you access your resources during a crisis?



who

IS RESPONSIBLE FOR YOUR LIBRARY?

Appoint a project manager (we'll call them the Librarian!) for your resource library.

This key person will have two roles and is critical to ensuring that everything is cohesive, branded and that document control is maintained.

The steps can be spread throughout your in-house team or could be outsourced to a VA (or both). Regardless of which option you choose, it's important to appoint someone to drive this project – both in the creation of, and in the maintenance.



1

The first role is that of a project manager, responsible for the entire resource library project.

2

The second role is that of maintenance and continual improvement. Once the library is complete they will be responsible for document control, access, changes, integration with your operations, updates and new material.



As with any role within your organisation, define the responsibilities, process and expected outcomes with an SOP and Job Description.

how

TO CREATE YOUR RESOURCE LIBRARY



STEP 1

COLLATING YOUR RESOURCES

Collate all material that is currently in inboxes, sitting in computers, document folders, in cloud storage, on your website, in handouts ... and in heads!

For the information still in heads, talk to your team. Get them to transfer this to documented content. It doesn't need to be written; it can be recorded in verbal form (podcasts, recorded seminars etc.) as well as visual (animations, images, infographics, videos etc.). A variety of formats make the library engaging, interesting and incorporate various learning styles.

What resources are still missing? Include resources you need which aren't currently documented in your index and allocate creation to the person responsible.

Index this material. This is the start of your Table of Contents (TOC), the 'control centre' of your resource library and will help identify categories, types of content, age of content, access for the content, and most importantly – what's missing. To make things easier going forward, I suggest setting up a spreadsheet as you index your material.

Include information such as:

- Document name
- Author
- Revision date
- Version
- Tag or category
- Who will have access (e.g. internal, client, prospect)
- Media
- Priority (if you have collated a lot of material, consider identifying what are priorities and get those updated first).

STEP 2

TEMPLATES & SEARCHABILITY

Develop a template for each 'type' of content. If you don't already have one, this is also a great time to develop your brand and/or voice guide (which will also go in your library!) to define your brand's logo, colours, fonts and tone.

Your template should also have your document control (often placed in footers) which includes date, version number, author and authorisation.

Format existing content into these templates. At the same time, update material that is out of date, or needs refreshing. This is a perfect time to audit your assets:

- Are resources out of date?
- Are links active?
- Contact details correct?

As each piece of content is completed, upload it into your new system and update (or hyperlink to) your index. Include document control information in this index.

As you upload, decide on the best categories/tags to use. The ability to find resources quickly will make or break your library. Edit your index (which is now becoming your master TOC) according to the categories. As you save your documents in your system, use appropriate tags and categories to the document.



A library that is user friendly is a library that will be used by your team. Take the K.I.S.S. (keep it simple stupid) approach to your library structure.

STEP 3 **SHARE YOUR LIBRARY**

INTERNAL ACCESS

Document a procedure describing:

- How to add new resources to the library.
- How to update existing resources.
- How to invite someone to the library (and the guidelines around this access).
- How to use resources.

Team members are then trained in this procedure and can start using the library immediately.



Integrate your internal resources into your SOPs, systems and processes. Leverage this resource you've created and in doing so you'll ensure it's kept relevant, current and utilised.



CLIENT ACCESS

Personally invite your clients to the library, educating them on the benefits of your resources. Help them to see how you are adding value to increase their opt-in.

Ensure as part of your new client onboarding process that they are given invites into the resource library and shown the benefits of using these resources.

NOTE: it's also important to ask for feedback both internally and externally about the library once you've rolled it out. Ask the following questions:

- How easy is the library to use?
- How relevant are the resources?
- How could the library be improved to better meet their needs?

Ask yourself how are you going to measure use of the library?

Promote the material when you are working with new and current clients.

ATTRACT AND CONVERT CLIENTS USING PART OF YOUR LIBRARY AS A MARKETING RESOURCE

Use relevant material as a base for connecting with potential clients. Suggestions include:

- Promote bonus material to create landing pages which will attract prospects to an area of your library where you give them helpful content aimed at building a relationship (and their trust).
- Don't forget to trigger email sequences as they sign up, take them on a journey.
- Link to content in the library throughout the email sequence to keep them engaged ... and ultimately to become customers.
- Create an FAQ on your website and link to the material. Use the material to build your email lists (landing pages) and as part of your content marketing strategy.



OUR TOP

tips

- Make one person responsible for your library creation, administration and management.
- Commit from the get-go. Create a project complete with a budget, milestones, responsibilities and your desired outcome.
- Sell the benefits of your library to your team to motivate and inspire their support.
- Ensure your library is scalable so setup only needs to occur once.
- Survey your clients to get their input on the type of resources they'd use and find value in.
- Set aside a few hours each month to manage your library which includes monitoring usage, new resources and new ways to leverage your library.
- Get started! A well setup and maintained resource library is worth your investment.

“The journey of a thousand miles begins with a single step.”

~ Lao Tzu

HOW CAN WE HELP YOU?

Our VBM's are experts in creating sustainable, scalable resource libraries if you're looking for a done-for-you solution



BOOK YOUR DISCOVERY CALL

LET'S TALK

