

# PRD/Strategy Brief | Q1 Content Growth Loop Strategy

## Context

### Background & Objective:

Outline the background and any business challenges/opportunities driving this initiative. Briefly describe the project's purpose and how it aligns with Athena's overall business strategy.

In Q1 we aim to drive at least 1000 booked calls/month, resulting in at least 300 CWD/month at a budget of ~\$530k/month for an average CAC of \$2k. In order to do this the team is focused on 1 O and 3 KRs.

### O: Drive sustainable, high-quality user acquisition within Q1 2026

- KR1: Drive 3000 Booked calls and 836 new clients in Q1 Growth Forecast V4 (HDYHAU)
- KR2: volume/Fuel: Identify, test, and validate high-converting content templates by publishing 6 new founder-led case study/playbook formats and revamping 20 existing playbooks, driving +100 incremental MALs/month (4 per content asset).
- KR3: Efficiency: Increase website user to booked call conversion rate by 20%.

In Q1, while maintaining evergreen growth loops to drive steady state growth in KR1 (paid, CRO, referral, email), **Growth will take a bet and develop a founder native content loop (KR 2)** to fuel growth through compounding trust via an executive-leverage journey that teaches, proves and finally broadcasts leverage. This works because busy people want freedom. We will integrate this content loop into the evergreen distribution channels (broadcast leverage) to create a flywheel of growth through ICP oriented content, which should increase CVR and make the funnel more efficient.

### Examples:

- Case study: Day in the life of \$50M founder with an Athena EA
- Case study: I tracked every interruption for 30 days – here's what it cost me"
- Playbook: Operator teardown: inbox, calendar, delegation SOPs

### Big Bets:

- Develop Content Loop (KR2): Develop a scalable AI supported ecosystem to gather and leverage founder stories as fuel on Athena-owned touchpoints to more efficiently acquire inbound prospects: Website, outbound email and linkedin, organic social, paid media (requires more permissions). In Q2+ this flywheel will also support activation and retention via integration into the onboarding and ops process.
- Develop an Executive Leverage Audit (KR3 - compounds the content loop): eg "audit your time - how much time are you giving away each week? We can calculate it and give you a

score and promise to save you XX hours in Y time period." A hook like this can be leveraged across all distro channels to entice people to take action, and also drive social sharing (virality). For Athena, it also serves as a lead magnet that we will then nurture with content/offering and scoring tool that is high interest/low commitment ahead of the sign up. Depending on audit score → straight to sign up form. The promise compliments the hook - you're X type of delegator, we can get you delegating your first task within XX days of being matched to an EA (required coordination with Ops) to save you ~Y amount of time (per the calculator).

Source:  Athena Q1 Growth Strategy

## Problem(s) to Solve:

*Clearly define the identified problems the project will address/solve*

Problem: lack of organic channel growth leads to higher CAC:

- 20-25% of growth comes from paid channels at ~\$4k paid CAC. While paid will continue to be a core component of growth, increasing CWD from non paid channels (organic) increased diversification and decreased blended CAC. (source:  Growth Forecast V4 (HDYHAU))

Problem: lack of ICP oriented fuel for our distribution channels leads to lower funnel conversion rates

- User to sign up (MAL) conversion rate across the high traffic pages is 3.15% with ~40% of those people completing a call. Increasing CVR decreases blended CAC.  
 Athena Funnel Conversions and Test Prioritization

## Hypotheses:

*Why is the problem happening // what might help mitigate the issue?*

1. A founder-led content growth loop will increase the relevance of our content by teaching leverage (playbooks), proving leverage (case studies) and broadcasting leverage (used in distribution channels).
2. We have existing playbooks that are based on real clients ([agora/Eliot playbooks](#)) and desk research ([playbooks.com](#)) that we can leverage to test into the efficacy of this growth loop by highlighting the 20 that align most with our ICP (through AI summary of gong calls/customer calls and mapping back to put playbooks database) and developing templates to begin to distribute them on our owned website and paid distribution channels.
3. Founder led client playbooks and case studies will be more effective than playbooks developed based on non-client desk research
4. We can develop an ai-supported ecosystem that makes founder-led case study creation and distribution fast and scalable so that we're able to publish at least 4 new playbooks and case studies per month starting in Q2.

5. Growth controls the distribution channels, eliminating barriers to leveraging this new fuel in our distribution engines and making it simpler to roll out

## How will we know if we are successful?

*Primary KPI:*

- KR #1: Volume - by EOQ goals
  - driving +100 incremental MALs (sign ups)/month
- OKR #2: Volume/Fuel - by EOQ goals
  - Identify, test, and validate high-converting content templates (y/n)
  - publishing 6 new founder-led case study/playbook formats (y/n)
  - revamping 20 existing playbooks (y/n)

## Potential Solution(s):

*Describe proposed solution to Problems to Solve*

*Foundations: Establishing templates*

*Templates:*

- Case study | proving leverage through the client
  - Format: problem, athena's solution, impact
  - Mediums:
    - Website template
      - optimized for device, readability, action (download), seo/lms
    - Social template: can be used on organic and paid LI, maybe meta
      - Talk to marco about specs
    - Email Newsletter
- Founder led Playbook | teaching systems
  - Format: teaching systems
  - Mediums:
    - Website template
      - optimized for device, readability, action (download), seo/lms
    - Social template: can be used on organic and paid LI, maybe meta
      - Talk to marco about specs
    - Email Newsletter
- Template creation: how are we framing the ICP.
  - Fuel creation:
    - Playbooks and case studies are likely to be generalized by common task (industry specific requires a lot more effort/source material that we may not have in the way our clients are using their EAs).
  - Distribution:

- Even if the content isn't verticalized, the distribution strategy should mention the vertical (have seen this work week in the past) in the headline of the template.
  - Verticalized doesn't have to mean industry, can mean identity

### *Starting work: Repurposing existing Playbook*

Ping Chris York this week to discuss how he can help with automations. Jonathan also mentioned that he can create new playbooks for us but tbd if needed. May be better to revamp all the content we have. To be discussed.

- Getting started:
  - Round up all the playbooks: eliot playbooks, [playbooks.com](#), agora ones
    - can we download them?
    - Note: we cannot use client's names in playbook creation since we did not get permissions for playbooks created in the past
  - Tag them by client playbook vs non client desk research playbook (how beyonce delegates)
  - Use gong to summarize highest mentioned pain points from sales calls to prioritize which we want to revamp
- Execution:
  - Revamp prioritized ~20 playbooks to fit into x-promoted distro strategy from above: optimized web templates, social templates, email templates
    - Consideration: these playbooks may be bad so let's temper expectations and make sure leslie copywrites them all

### *Foundations: Client Content Feedback Loop*

Note that Suman is developing a platform for this (Pollen).

#### Process:

- The ability to identify clients.
  - a. Let's start with csuite chris here:
    - i. Let's bootstrap with chris ho
  - b. Move to ambassadors and the clients that we talk to all the time (chris york)
  - c. Beyond ambassadors, work with tech on a dashboard to prioritize clients for outreach. Parameters we should set for Data to help us with a dashboard:
    - i. No escalations in last 6 months
    - ii. Who has been with their partnership for (X - 6?) months (should be based on churn metrics chong has been looking into)
    - iii. How satisfied are the clients NPS or Csat?
      - 1. What is the proxy for this? Is there a score or cal we use something else as a proxy?

- 2. If we aren't doing this, should we flag to member services and ask them why they don't.
  - iv. Metric: name, email address, Following count, # of referrals made (sign ups -> CWD)
- We need an incentive to entice clients to engage?
  - a. Incentives should be tiered. Do you get access to priority support, beta previews, service add ons, discounts (instead of cash), premium level insights for specific ppl
    - i. Consideration: Access to budget
  - b. Open Question: At what point do we give them enough to do through leadership for athena - write for us, host webinars → when does this start to dovetail with referral perks?
- What is the approach to ensuring Athena is protected?
  - a. Legal needs to put together contract considering incentives, media release, usage rights, cross promotional sharing requirements. Needs to be clear that this is separate from the referral program, editorial control
- We need to have a system for outreach:
  - a. Who are we reaching out to (details above): start with ambassador → dashboard
  - b. How are we reaching out (medium): emailing them, in product message, member services, survey mention?
  - c. What are we saying when we reach out: script & follow up cadence
  - d. Once they agree contract is signed (sent via docusign?)
  - e. Onboarding process:
    - i. Athena establishes a set of questions for case study response and playbook response
    - ii. Athena shares questions via email with instructions on how to proceed per decisions below
    - iii. Client answers questions (how)
      - 1. Open Question: written answers from Q&A, voice recording, video recording. AND do we want to do interview approach or async approach.
        - a. If we want to test voice recording and video recording, what platforms?
        - b. Consideration: if meeting Q&A then we need to schedule 30-45 minute interviews
- Content summary → distribution:
  - a. Leverage AI to summarize the massive transcript and pull out the key information according to what we need (simple pull quotes for all channels, web template etc)
    - i. Leslie will do manual scan to ensure we're not missing anything
  - b. Distribution:
    - i. [Testimonial quote library](#) (to be used across all channels)
    - ii. (Nixie) Website template: Story is merged into the case study and/or playbook template

1. We need nixie here on template review & creation for performance
2. Ungated vs gated
- iii. (Nixie) Digital Paid/Organic Social templates: Linkedin,

## Strategy & Timeline:

*What are your expectations around how and when this project will be delivered? Are there expectations about hitting specific milestones along the way?*

[Asana Task]

### Phase 1: Starting the foundations [through 2/6]

- Templates: R Nixie
  - Start with Chris York here. Have him do some competitive research for us and bring it together for nixie to create
  - Create core template for playbook and case study web distribution and social distro
    - Case study web: 2-3 template designs with option for gated vs ungated (will be shared for feedback)
    - Playbook web: 2-3 template designs with option for gated vs ungated (will be shared for feedback)
    - Case Study Social: 2-3 template iterations
    - Playbook Social: 2-3 template iterations
    - Email Newsletter case study section: 2-3 iterations
    - Email Newsletter playbook section: 2-3 iterations
  - Reach out to Marco for social specs. Reach out to Den for any email best practices for the newsletter template
  - Note: ideally we are creating a content hub on the website where these templates can be hosted in March when we're ready to publish. [See example](#)
- Operations: R Serena
  - Involve Chris York:
    - walk chris york through content feedback loop
    - finalize approach with his support on leveraging automation
  - finalize the incentive structure
  - Share client selection dashboard params with chong for creation
  - Create content calendar: consider evergreen and seasonal content (asana)
  - Summarize gong calls for key pain points
  - Centralized list of our existing playbooks in google sheet so we can prioritize against pain points
  - Reach out to legal with request to create boilerplate contract for content
  - Create a list of clients for outreach on template feedback

- Messaging Foundations: R Leslie
  - Craft outreach messages:
    - initial outreach from Leslie and follow up with (2x)
      - Coordinate with Ops (cha/sol) so they can support us here. We should get a list of clients and their CPMs and add the CPMs on cc so they can jump in, if needed.
  - Establish Case study interview questions and playbook interview questions
    - Coordinate with Nixie so she knows what will be asked as she develops templates

## Phase 2: Template Feedback & Playbooking & Existing Playbook Execution [2/9 - 2/20]

- Templates: R Nixie
  - 2/6: Share templates with clients for qual feedback
  - 2/11: Adjust based on feedback and finalize
- Operations: R Serena
  - Centralize all final operations & links into a shareable playbook
  - Get client selection dashboard from Chong's team
  - Actually prioritize the existing playbooks to revamp based on pain points from Gong
  - Receive finalized boilerplate contract from legal
  - Fill out content calendar
- Execution: R Leslie
  - Leveraging knowledge of Nixie's playbook templates, revamp the first 10 playbooks accordingly

## Phase 3: [2/23 - 2/27]

- Templates: R Nixie/Rey
  - Build web templates into webflow & QA
  - Create a template library in drive for social and email templates, share with Serena to add to content playbook
- Operations:
  - Update content calendar
- Execution: R Leslie
  - Leveraging knowledge of Nixie's playbook templates, revamp next 5 playbooks accordingly
  - Outreach to first batch of ~15 clients for new content creation according to playbook. Send availability specifically for **next 2 weeks only**

## Phase 4: [3/2 - 3/6]

- Templates: N/A
- Operations:
  - Update content calendar
- Execution:
  - R Rey: Move all 15 existing playbooks onto the website and QA
  - R Leslie: Leveraging knowledge of Nixie's playbook templates, revamp next 2 playbooks accordingly. *Moving forward revamp 2 playbooks/week until existing relevant content is exhausted.*
  - R Leslie: Interview clients per playbook

## Phase 5: [3/2 - 3/13]

- Templates: N/A
- Operations:
  - update content calendar
- Execution:
  - R Leslie: Leveraging knowledge of Nixie's playbook templates, revamp 2 playbooks each week. *Moving forward revamp 2 playbooks/week until existing relevant content is exhausted.*
  - R Leslie: Interview clients for new material → ai summarize → move into templates → publish content from at least 5 clients

## Project Dependencies:

*Does this project require other projects to be completed before this project can kickoff? Are there other projects that completion of this project is blocking?*

Organic Social owner

## Open Questions/Considerations:

Please provide any open questions that need to be addressed for project to begin or any additional details you think are relevant.

- Incentives: At what point do we give them enough to do through leadership for athena - write for us, host webinars → when does this start to dovetail with referral perks?
- Client answers questions (how)
  - a. Decision to be made: written answers from Q&A, voice recording, video recording. AND do we want to do interview approach or async approach.
    - i. If we want to test voice recording and video recording, what platforms?
    - ii. Consideration: if meeting Q&A then we need to schedule 30-45 minute interviews

- Agora playbooks - Are we even able to use these playbooks?
  - a. Agora: We need to ask legal if we are able to use agora playbooks
  - b. Anonymous: probably okay to use
  - c. Identified playbook: likely need to reach out (see above client feedback loop for how we would reach out)

## Reference Documents/Materials:

*Eg past competitive analysis, surveying etc*

## RACI:

*RACI Quick-Ref: Responsible = does the work; Accountable = owns the outcome; Consulted = gives input; Informed = gets updates.*

*note: different people can be R for each phase. E.g pranav may be R on hubspot implementation phase.*

Phase	Responsible (1 person)	Accountable (1 person)	Consulted (multiple stakeholders)	Informed (multiple stakeholders)
Template Creation	Nixie	Jeana	Jeana, Serena, Leslie, Rey, Thomas, Marco (social), Den (email)	
Operations	Serena	Serena	Chris York	
Messaging & Outreach & Creation	Leslie	Serena	Jeana	

## Feedback:

Key:

- = call out something you're especially aligned with
- = call out a flag to consider
- = call out something that must change based on your subject matter expertise
- = incremental idea

Phase	Feedback
@name	
