

# **Strategic Marketing Playbook**

Resource Plan

**Resource Plan Overview**

# Building Blocks & Deliverables

## BRAND STRATEGY

Defines your brand and who you serve

### DELIVERABLES:

- Why Your Brand Exists
- Promise & Secret Sauce
- Ideal Target & Roles
- Brand Architecture
- Naming Strategy
- Personality & Tone-of-Voice

## COMMUNICATION STRATEGY

How, when and where you will communicate

### DELIVERABLES:

- Hero's Story Outline
- One Liner vs Competition
- Key Messages
- Journey Map
- Channel Strategy
- Style Guide

## MARKETING PLAN

How you will deliver business results

### DELIVERABLES:

- Marketing Plan Overview
- Priorities, Tactics & KPI's
- Calendar Overview
- Budget Priorities
- KPI Tracker
- Results Dashboard

## RESOURCE PLAN

How you will resource The marketing team

### DELIVERABLES:

- **Resource Plan Overview**
- Team Structure
- Internal Roles & Responsibilities
- External Resource Scope

# Resource Plan Overview

Insights and Indicated Actions that are the foundation for the Team Structure, Internal Roles & Responsibilities and External Resource Scope

## Steps to Create a Resource Plan Overview

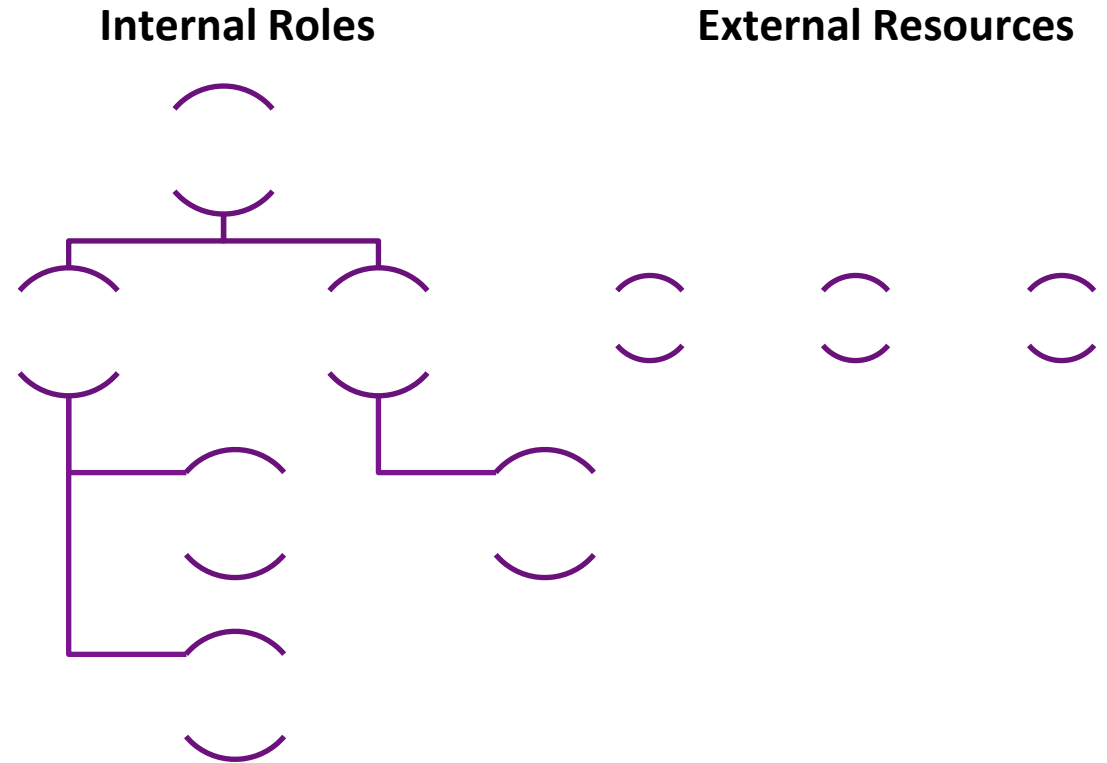
1. Document the current Marketing Organization, Scope, and assess the current Capabilities
2. Review the Business Inputs and Marketing Plan Deliverables
3. Define the New Marketing Scope needed
4. Define the Capabilities needed to deliver the New Marketing Scope
5. Identify the Opportunities & Constraints
6. Write the Resource Insights based on your analysis above
7. Write the Resource Indicated Actions that are needed for marketing to be successful

# Current Marketing Organization

Answer these questions and develop a visual that shows:

- Who is leading the marketing team?
- Who does that person report to?
- How many people are on the team?
- What are the titles of each person?
- Are there multiple levels?
- Are roles full time (FT) or part time (PT)?
- Show what is internal versus external

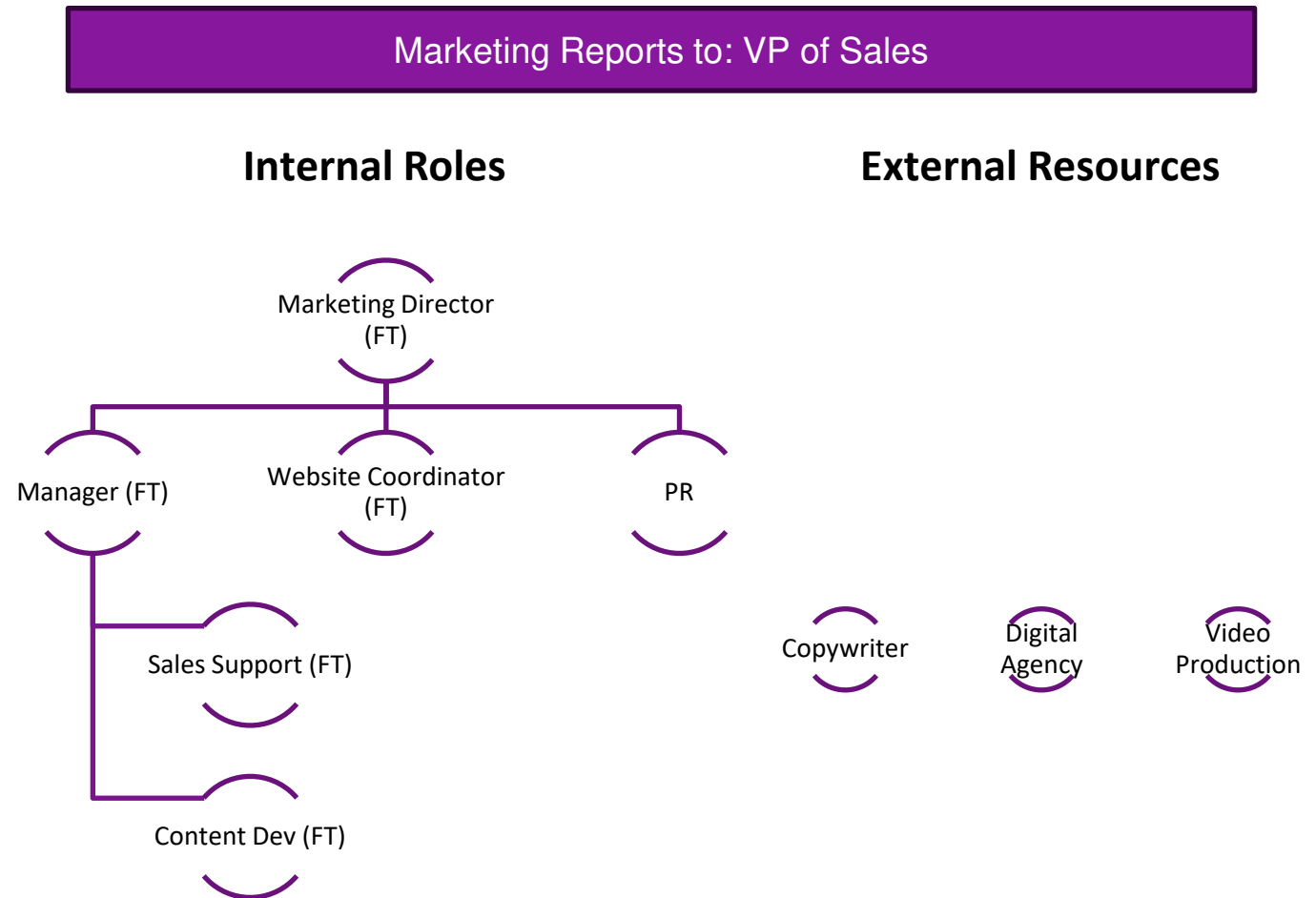
Marketing Reports to:



# Current Marketing Organization - Example

## Overview

- **Leader:** Marketing Director
- **Marketing Reports to:** VP of Sales
- **Internal Roles:** 6
- **FT:** 6
- **PT:** 0
- **Levels within the team:** 3
- **External Resources:** 3



# Input & Analysis Tool

Scope Category	Current Scope	New Scope
<b>STRATEGIC</b>		
<b>Business Scope</b>		
Companies	moderate	moderate
Businesses / Divisions	significant	significant
Global Business	moderate	moderate
Languages	limited	limited
Verticals/Industries	significant	significant
Sales Channels	moderate	moderate
Products & Services	moderate	moderate
Innovation Portfolio	limited	limited

Capability	Current Capability	Needed Capability
<b>FUNCTIONAL EXPERTISE</b>		
<b>Digital</b>		
Website & App Management	moderate	significant
e-Commerce	none	none
SEO	none	moderate
Paid Digital	none	moderate
Social - Page Management & Posting	limited	significant
Reputation Management	limited	limited
Digital Analytics	limited	significant

# Scope - Current

## Scope of Work Overview

- Level of effort for specific activities that the marketing team currently completes
- The activities are grouped into categories within two areas “strategic” and “deliverables and services”

## Assess the Current Scope

1. In the excel scope input tab, rate the current level of effort for each activity from “none” to “significant”
2. The charts tab will automatically create bar charts that visualize each category’s effort level

## Create a Scope of Work Summary

1. Copy the current scope bar charts from the charts tab to a ppt page
2. Add bullets that explain the current level of effort for each strategic category
3. List the deliverables and services that are the most effort (longest bars)
4. If you need more detail, review the scope input tab

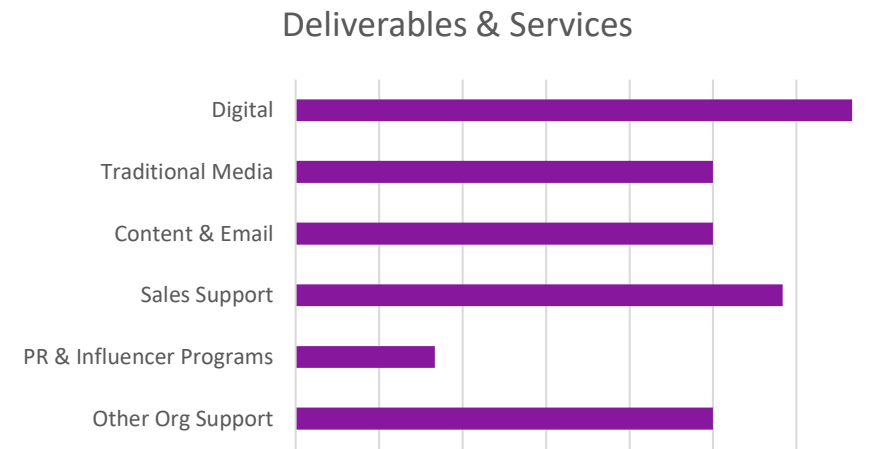
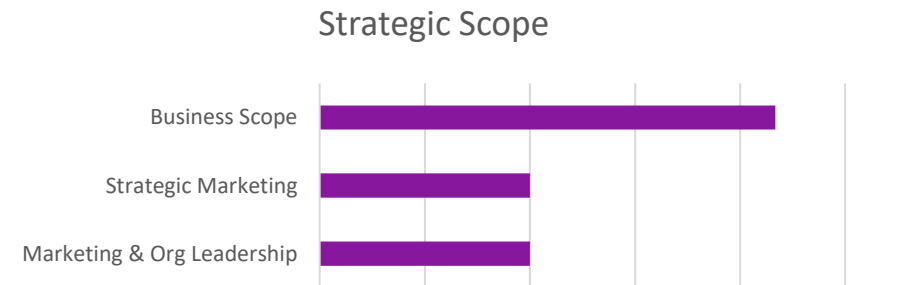
# Scope of Work – Current Example

## Current Level of Strategic Work

- The business scope is significant (several divisions, stretch growth targets)
- The team is currently not working on strategic marketing or marketing and organizational leadership very much

## Current Primary Deliverables & Services

- Digital
- Sales Support
- Other Org Support



Longer bar = more effort



# Capabilities - Current

## Capabilities Overview

- Estimate marketing's current skill level for each specific capability
- Capabilities are grouped into categories within three areas “strategic,” “functional” and “communication & team effectiveness”

## Assess the Current Capabilities

1. In the Excel file capability input tab, rate the current capability from “none” to “significant”
2. The charts tab will automatically create bar charts that visualize each category's effort level

## Create a Current Capabilities Summary

1. Copy the bar charts from the charts tab to a ppt page
2. Add bullets that explain the current skill level for each category
3. If you need more detail, review the capability input tab

# Capabilities – Current Example

## Strategic Capabilities

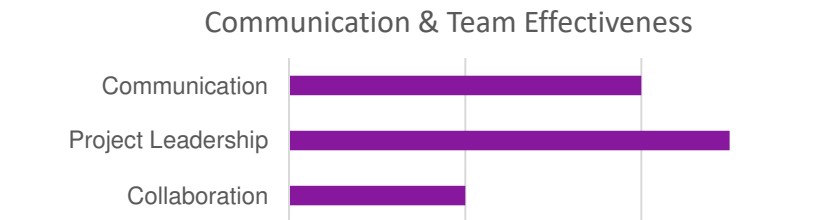
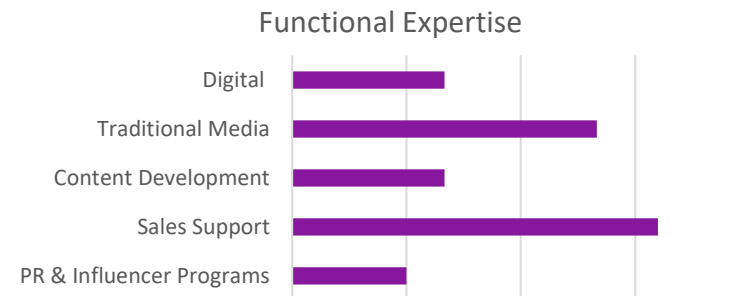
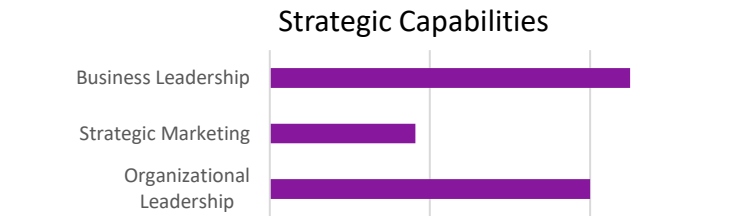
- Strongest capability is business leadership
- Strategic marketing is not a strong capability

## Functional Expertise

- Strongest capability is sales support, followed by traditional media
- There is not as much capability in digital, PR & influencer programs or content development

## Communication & Team Effectiveness

- Strong project leadership
- Collaboration is not a strong capability



Longer bar = more capability

# Review Business Inputs Example

## Priorities, Initiatives & Assumptions

- Support 3 Brands (B2B and B2C)
- Focus on key verticals within each brand
- Develop new sales development process
- Significant competitive B2C pressure
- New website launch with one brand
- Refreshed website with another brand
- Increase event activity

## Desired Outcomes & Metrics

- Incremental Sales \$ Revenue in all brands
- Increase # of Larger Customers
- Reduced Low-Margin Customers

Business Metrics	Vs. YA
Sales \$ Revenue	+50%
Customers	+20%
Profit %	+5%

# Review Marketing Plan Deliverables

Deliverable	Description
Marketing Plan Overview	<ul style="list-style-type: none"><li>• Business inputs and insights that are guiding the marketing plan</li><li>• Marketing Priorities by Funnel Stage</li></ul>
Priorities, Tactics & KPIs	<ul style="list-style-type: none"><li>• Priorities – From the marketing plan overview – Priorities by Funnel Stage</li><li>• Tactics – 3-5 activities for each Priority</li><li>• KPI's – 3-5 metrics that helps measure effectiveness of the Tactics</li></ul>
Calendar Overview	<ul style="list-style-type: none"><li>• Ideal Target's perspective throughout the year based on seasonality, major activities, events, holidays, etc.</li><li>• Add the organization's major activities, events, and initiatives</li></ul>
Budget Priorities	<ul style="list-style-type: none"><li>• The spending needed to deliver the Priorities &amp; Tactics</li></ul>

# Scope – New Vs. Current

## Assess the New Scope

1. Based on the business Inputs & Marketing Plan Deliverables
2. In the excel scope input tab, rate the new level of effort for each activity from “none” to “significant”
3. The charts tab will automatically create bar charts that visualize each category’s new effort level versus current

## Create a New Scope of Work Analysis

1. Copy the new vs. current bar charts from the charts tab to a ppt page
2. Review the current scope summary
3. Document the changes in scope
4. If you need more detail, review the scope input tab

# Scope - New Vs. Current Example

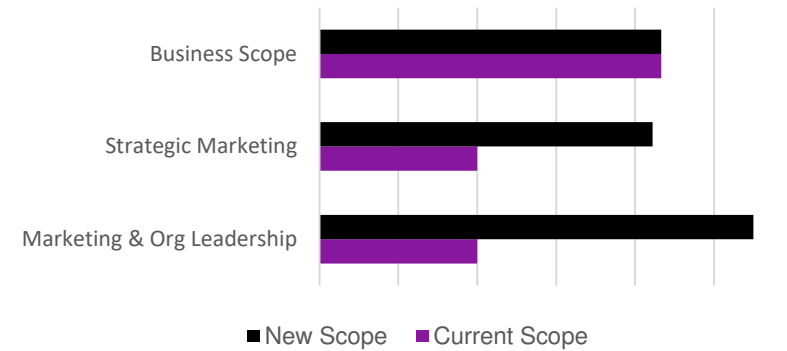
## Strategic Scope

- The new scope includes significant marketing and organizational leadership and some increase in strategic marketing.

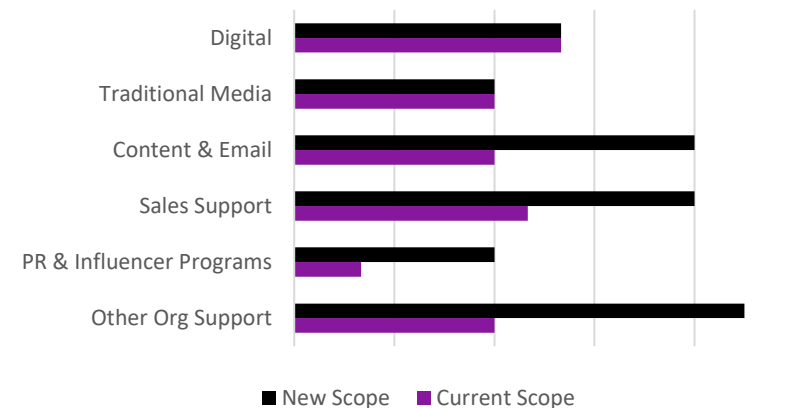
## Deliverables & Services

- The new scope includes significant organizational support beyond traditional marketing, content and email and sales support.

Strategic Scope - New Vs. Current



Deliverables & Services - New Vs. Current



Longer bar = more effort

# Capability – Needed Vs. Current

## Assess the Capabilities Needed

1. Based on the new scope of work
2. In the capability input tab, rate the needed capability to deliver the new scope
3. The charts tab will automatically create bar charts that visualize each category's needed capability level versus current

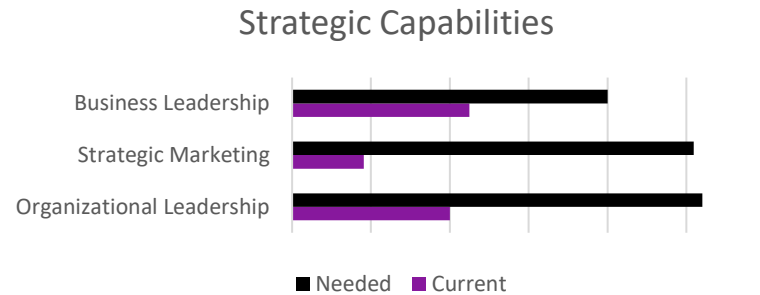
## Create a Capability Assessment

1. Copy the new vs. current bar charts from the charts tab to a ppt page
2. Review the current capability summary
3. Document the differences between the needed and current capability
4. If you need more detail, review the capability input tab

# Capabilities - Needed Vs. Current Example

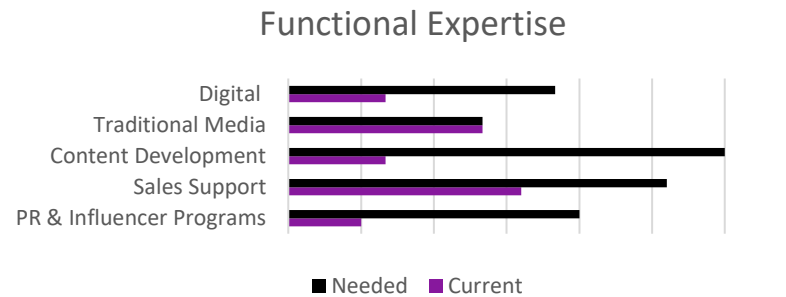
## Strategic Capabilities

- The new scope needs significant strategic capabilities across all categories, but strategic capabilities are currently limited



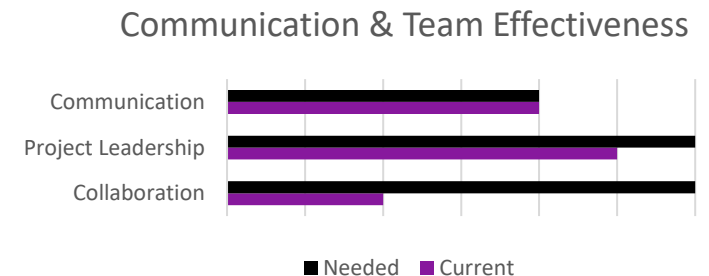
## Functional Expertise

- The new scope needs significant content development and digital and even more sales support than current



## Communication & Team Effectiveness

- The new scope needs more significant collaboration but limited change for communication and project leadership



Longer bar = more capability



# Opportunities & Constraints

What Opportunities and Constraints do you need to consider either now or in the future?

## Example Categories:

- Budget
- Organizational focus
- Organizational alignment
- Marketing influence in the organization
- Training & development
- Location, benefits, working conditions
- Other relevant considerations

# Opportunities & Constraints - Example

## Opportunities

1. Current lean team enables building the new team from the ground up
2. Long-term organizational commitment to building a world class marketing org including hiring additional resources and building bench strength
3. Working towards an aligned strategic plan and clear priorities across the organization
4. Good timing with new marketing leader

## Constraints

1. Significant new marketing capabilities required
2. History of reactivity and lack of sustained focus from/for marketing team will make change more difficult
3. Finding people to work in our location and/or organizational alignment to remote/hybrid resources for some roles

# Resource Plan Overview

## Resource Insights

- Any relevant insights about the Current Organization Structure
- Biggest changes in the Scope and in Capabilities needed and gaps between new and current
- Opportunities & Constraints that must be considered

## Indicated Actions

- What could be done to address the insight
- Will impact the Team Structure, Internal Roles & Responsibilities and External Resource Scope

# Resource Plan Overview Example

The scope of work has shifted significantly and into areas that the current team does not have moderate to significant capability

Insight	Indicated Action
Significant scope increase in strategic marketing, but there isn't significant internal capability	Either train a current team member or hire a marketing leader with strategic marketing capability
Organization has a marketing leader and with strategic capability but the scope of work includes a significant level of content development and there is limited capability in this	Consider hiring an external resource and/or an internal role to manage the content development

# Next Step

## BRAND STRATEGY

Defines your brand and who you serve

### DELIVERABLES:

- Why Your Brand Exists
- Promise & Secret Sauce
- Ideal Target & Roles
- Brand Architecture
- Naming Strategy
- Personality & Tone-of-Voice

## COMMUNICATION STRATEGY

How, when and where you will communicate

### DELIVERABLES:

- Hero's Story Outline
- One Liner vs Competition
- Key Messages
- Journey Map
- Channel Strategy
- Style Guide

## MARKETING PLAN

How you will deliver business results

### DELIVERABLES:

- Marketing Plan Overview
- Priorities, Tactics & KPI's
- Calendar Overview
- Budget Priorities
- KPI Tracker
- Results Dashboard

## RESOURCE PLAN

How you will resource The marketing team

### DELIVERABLES:

- Resource Plan Overview
- **Team Structure**
- **Internal Roles & Responsibilities**
- **External Resource Scope**

# Recap - Resource Plan Overview

Insights and Indicated Actions that are the foundation for the Team Structure, Internal Roles & Responsibilities and External Resource Scope

## Steps to Create a Resource Plan Overview

1. Document the current Marketing Organization, Scope, and assess the current Capabilities
2. Review the Business Inputs and Marketing Plan Deliverables
3. Define the New Marketing Scope needed
4. Define the Capabilities needed to deliver the New Marketing Scope
5. Identify the Opportunities & Constraints
6. Write the Resource Insights based on your analysis above
7. Write the Resource Indicated Actions that are needed for marketing to be successful

**CMO-OnLoan<sup>®</sup>**

**Thank you!**