

**Strategic Marketing Playbook**  
Resource Plan  
**Internal Roles & Responsibilities**

# Building Blocks

## BRAND STRATEGY

Defines what you want to stand for.  
Evaluate ~5 years.

### 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. Changes annually.

### DELIVERABLES:

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

## MARKETING PLAN

How you will deliver results.  
Changes based on priorities.

### 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 Scope & Structure
- **Internal Roles & Responsibilities**
- External Resource Scope

# Internal Roles & Responsibilities

A Role is a person's position on the team and Responsibilities are the tasks or activities assigned to the Role.

## Steps to Create Internal Roles & Responsibilities

1. Review the Resource Plan Overview Inputs
2. Review the Team Structure Inputs
3. Define Responsibilities for each Internal Role
4. Write Job Descriptions for each Internal Role

# Review the Resource Plan Overview Inputs

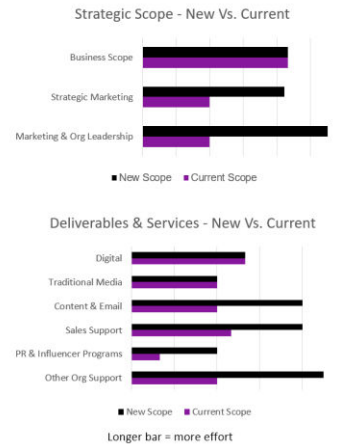
## Scope - New Vs. Current Example

### 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.



## 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

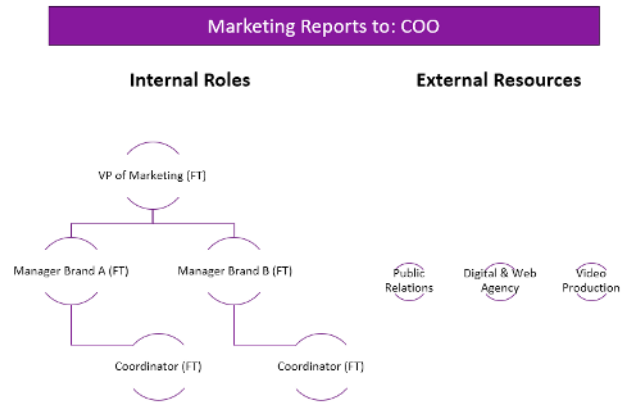


# Review the Team Structure Inputs

## New Marketing Team Structure - Example

### Overview

- **Leader:** VP of Marketing
- **Marketing Reports to:** COO
- **Internal Roles:** 5
- **FT:** 5
- **PT:** 0
- **Levels within the team:** 3
- **External Resources:** 3



## Internal Roles & Responsibilities Assessment - Example

- Job descriptions describe the work that needs to be done by role
- Marketing Dir is performing tasks on everyone's job descriptions
- Project Manager, Specialist are not performing all job description responsibilities
- The marketing team is managing many non-marketing responsibilities
- Don't have the capacity Leverage Internal and External Resources

**Job Description**

**Position Title:** Director of Marketing  
**Corporate Alignment:** Marketing  
**Department:** Strategy & Marketing  
**Employment Status:** Full Time Salary  
**Reports To:** Senior Vice President  
**Date Revised:** 10/9/20

**General Position Summary:**  
 The Director of Marketing will be responsible for driving top-line revenue by developing and leading a cohesive marketing strategy to include all of the branding, advertising and communications efforts for the Planes Companies. The Manager will help "sell the story" of the unique value that the Planes Companies brings to its customers through Marketing Project Manager responsibilities and customizable solutions to create in the moving, warehousing and transportation industries.

Current	Recommended	Per % of Total
Develop Marketing Strategy and Lead Implementation	No - Change to "Senior" Strategy	20
Develop and Implement Digital Strategy	No - Change to implement focused Ad Agency	20
Create & Manage Campaigns for Customer Experience	No - Move to Sales Support and Client Services?	5
Act as Creative Director	Yes - Support DDM	5
Identify and Implement Location Specific Marketing Tactics	No	5
Measure Overall Performance of Marketing Impact	Yes - Support DDM's impact measurement efforts	5
Collaborate with DDM to Evaluate Mktg Policies and Operating Practices	No	5
Create a high performing brand environment	No - DDM's job. We should contribute	5
Review, Review and Company Leadership on the Company's Marketing Strategy (Not Addressing Term Date)	Yes - DDM leads, DM supports	5
Lead Director of Ad-Development	No	5
Product Marketing & Mktg. (other Innovations)	Yes	5
Agency Management	Yes - Review via Mktg. Agency	20
RFP Management	Yes - Provide support only. Occurs 10x	20
Corporate and Employer Communications, Employee Events	Yes - With Employee/Corp Communications Mgr.	5
Collaborate with Sales leaders, Company Leadership on the Business	Yes - See DDM build marketing and sales relationship	20
Apply Mktg. CRM	No	5
Sales Customer Relationship Management	No	5
Maintenance of Internal Blog	No	5
Trade Show Support	Yes - Collaborate with Sales, Provide Support, Attend	5
Maintenance of Internal Wiki	No	20

## Marketing Roles by Level Guidelines

Role	Description
Chief Marketing Officer (CMO) / Vice President	<ul style="list-style-type: none"> <li>• 10-20 years of experience and probably need additional education like an MBA.</li> <li>• Oversee all elements of the function and usually a member of the c-suite leadership team.</li> <li>• Demonstrates high levels of strategic, functional and communication and team effectiveness capabilities.</li> </ul>
Director	<ul style="list-style-type: none"> <li>• 7-10 years of experience and might need additional education like an MBA.</li> <li>• Oversees others who implement marketing activities.</li> <li>• Demonstrates moderate to high levels of strategic, functional and communication and team effectiveness capabilities.</li> </ul>
Manager	<ul style="list-style-type: none"> <li>• 3-5 years of experience. Has a more direct role in creating the marketing plan, including developing strategies, messaging.</li> <li>• May or may not supervise others.</li> <li>• Demonstrates moderate levels of strategic, functional and communication and team effectiveness capabilities.</li> </ul>
Specialist / Coordinator	<ul style="list-style-type: none"> <li>• Entry-level role that implements the tactical elements of the marketing plan.</li> <li>• Doesn't supervise others.</li> <li>• Demonstrates limited levels of strategic, functional and communication and team effectiveness capabilities.</li> </ul>

# Internal Roles & Responsibilities

Outline the responsibilities for each internal role

Role 1 (FT/PT)	Role 2 (FT/PT)	Role 3 (FT/PT)
Responsibilities:	Responsibilities:	Responsibilities:

# Internal Roles & Responsibilities - Example

Role: Director	Role: Specialist	Role: Specialist
<p>Responsibilities:</p> <ul style="list-style-type: none"> <li>• Lead and support for team</li> <li>• Leadership Team member</li> <li>• Marketing Strategy &amp; Plan</li> <li>• Results Dashboard</li> <li>• Other Industry Strategy</li> <li>• Key Supplier Plans</li> <li>• Trade Show plan</li> <li>• Innovation Strategy</li> <li>• International Strategy</li> <li>• Customer Journey</li> </ul>	<p>Responsibilities:</p> <ul style="list-style-type: none"> <li>• CRM Plan, tracking &amp; analysis</li> <li>• Ecommerce, plan, tracking &amp; analysis</li> <li>• Website plan, updates, tracking &amp; analysis</li> <li>• Direct Mail &amp; Email blasts</li> <li>• Content Calendar &amp; schedule</li> <li>• Media Plan &amp; Placement</li> <li>• Sales tools - plan &amp; development</li> <li>• Promotional Plan, creative design</li> <li>• Event Plan</li> <li>• Market Intelligence</li> <li>• Budget</li> </ul>	<p>Responsibilities:</p> <ul style="list-style-type: none"> <li>• Regional Trade Shows</li> <li>• Annual Events</li> <li>• Sales presentations</li> <li>• Graphic design</li> <li>• Content – collecting &amp; organizing information</li> <li>• Client gifts, promotional items, tickets, etc.</li> <li>• Monthly newsletter</li> <li>• Phone answering procedures</li> <li>• Implement marketing for internal events</li> </ul>

# Job Descriptions

Create a Job Description by adding the following to each Internal Role

- Title
- Company/role description
- Responsibilities (duties)
- Qualifications (skills)
- Education & Training
- Salary



# Recap – Internal Roles & Responsibilities

A Role is a person's position on the team and Responsibilities are the tasks or activities assigned to the Role.

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**Thank You!**