

Strategic Marketing Playbook

Resource Plan

Team Structure

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

Team Structure

How you will resource marketing, including the relationships between activities, leadership and team members

Steps to Create a Team Structure

1. Review the current Resource Plan Overview Inputs
2. Assess the current Internal Roles & Responsibilities
3. Assess the current External Scopes
4. Review Best Practices for Internal and External Resources
5. Review the Marketing Roles by Level Guidelines
6. Draft a few Team Structure options
7. Gain leadership feedback
8. Finalize the new Team Structure

Review the Resource Plan Overview Inputs

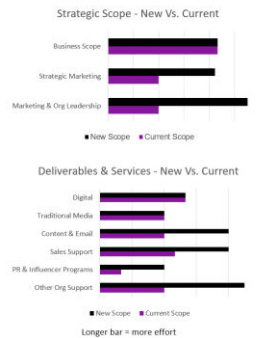
Scope - New Vs. Current Example

Strategic Scope

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

Deliverables & Services

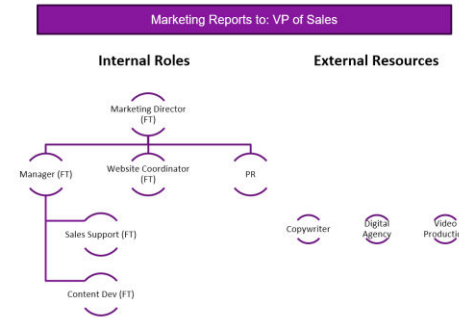
- The new scope includes significant organizational support beyond traditional marketing, content and email and sales support.



Current Team Structure - 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



Capabilities - Needed Vs. Current Example

Strategic Capabilities

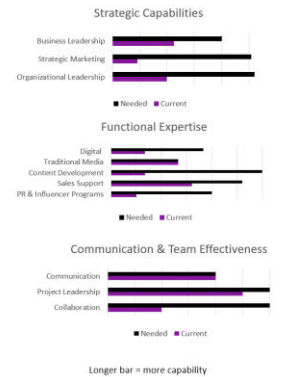
- The new scope needs significant strategic capabilities across all categories, but strategic capabilities are currently limited

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



Opportunities & Constraints - Example

Opportunities

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

Constraints

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

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

Assess Current Internal Roles & Responsibilities

- Review the current job description for each role
- Review the current project lists to identify the major buckets of work that is being done and about how much time for each (conduct a time study if you need to)
- Discuss what's working/what's not working with team and leadership
 - Do the job descriptions describe the work that needs to be done?
 - Are the people performing the tasks in the job descriptions?
 - Is anyone performing tasks that are not listed in the job descriptions?
- Create a list of opportunities and gaps for the current Roles and Responsibilities

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 to manage External Resources

Job Description

Position Title:	Director of Marketing
Corporate Assignment:	Marketing
Department:	Strategy & Marketing
Employment Status:	Non Exempt-Salary
Reports To:	Senior Vice President
Date Revised:	10/9/20

General Position Summary:

The Director of Marketing will be responsible for driving topline 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 "tell the story" of the unique value that the Planes Companies brings to its customers through the innovative and customizable solutions it creates in the moving, warehousing and transportation industries.

As such, the Director of Marketing will act as the Creative Director for the department ensuring the creative content & marketing materials produced are consistent with the brand strategy, brand guidelines and message strategy. Additionally, the Director of Marketing's responsibilities will include creating compelling content that drives awareness, measurable interaction and improves the overall brand prospecting efforts via a digital marketing plan.

Assess Current External Scopes

- Review all External Scope Documents
- Review the external resource current project lists to identify the major buckets of work that is being done and about how much time for each
- Discuss what's working/what's not working with team and leadership
 - Do the scopes describe the work that needs to be done?
 - Are the people performing the tasks in the scopes?
 - Is the team performing tasks that are not listed in the scopes?
- Create a list of opportunities and gaps for the current External Scopes

External Scopes Assessment - Example

- Several agencies working on projects
- Video agency is providing digital advertising but doesn't have the expertise
- The graphic designer doesn't have a scope
- Advertising agency isn't performing all duties in scope

- > **Strategic Consulting**
 - Brand Design Development
 - Public Relations
 - Thought Leadership
 - Sponsorship Strategies
 - Marketing Planning & Paid Media
 - Event Marketing
 - Social Media
- > **Public Relations & Social Media**
 - Strategy, Planning and Execution
 - Media Relations
 - Employee Relations
 - Social Media - b-to-c, b-to-b
 - Special Events & Trade Shows
 - Thought Leadership Strategy & Execution
 - Relationship management and community board placement
 - Consulting
 - Spokesperson Media Training
- > **Visual Communication**
 - Collateral Materials
 - Point of Sale and Promotional Materials
 - Corporate Identity
 - Brand Identity
 - Photography
 - Digital design

MONTHLY BUDGETS OF UP TO	Tier 1	Tier 2	Tier 3	Tier 4
Monthly Budgets of Up to	\$2,500	\$5,000	\$10,000	>\$10,000

CAMPAIGN SET UP	Tier 1	Tier 2	Tier 3	Tier 4
Development & Set Up			Included	
Dashboard Set Up			Included	
			Included	
	\$375	\$525	\$675	\$825

IGN MANAGEMENT	Tier 1	Tier 2	Tier 3	Tier 4
Management and Optimization			Included	
Dashboard			Included	
Dashboard			Included	
Alerts + Recommendations			Included	
Paid Social Audit			Included	
Alert System			Included	
Management and Ticketing System			Included	
IGN Management Cost	\$600	\$800	\$1,000	10% Monthly Media Spend

Management Package (Optional)	Cost
Management	
Performance Calls	
Reporting	
	\$500

Item	Cost
Management	TBD per hour
Reporting	\$150
Call Rail Software (monthly)	\$50
Strategy Work	TBD per hour
Paid Search and Paid Social Audit	\$375
Google Analytics Audit	\$1,500
Google Analytics Set Up	\$1,500
Landing Page Development	\$500
Unbounce Software (monthly)	\$50
Weekly/Monthly Performance Calls	TBD per hour
Client Contact/Client Management	TBD per hour

Internal vs. External Best Practices

Internal Teams

- Owns mission-critical roles
- Orchestrate all activities
- Creates marketing strategies based on company strategies and priorities
- Provide targets, deliverables and metrics (ROI-focused style)
- Provide perspective about company operations & culture
- Owns data and technology

External Resources

- Specialized skills, experience, and flexibility
 - Digital, social & web design
 - Content (writing, graphic design)
 - Advertising
 - Research
 - Lead generation
 - Project management
- Execution, Tracking, Analysis, Recommendations
- Collaborating with other agencies and internal team

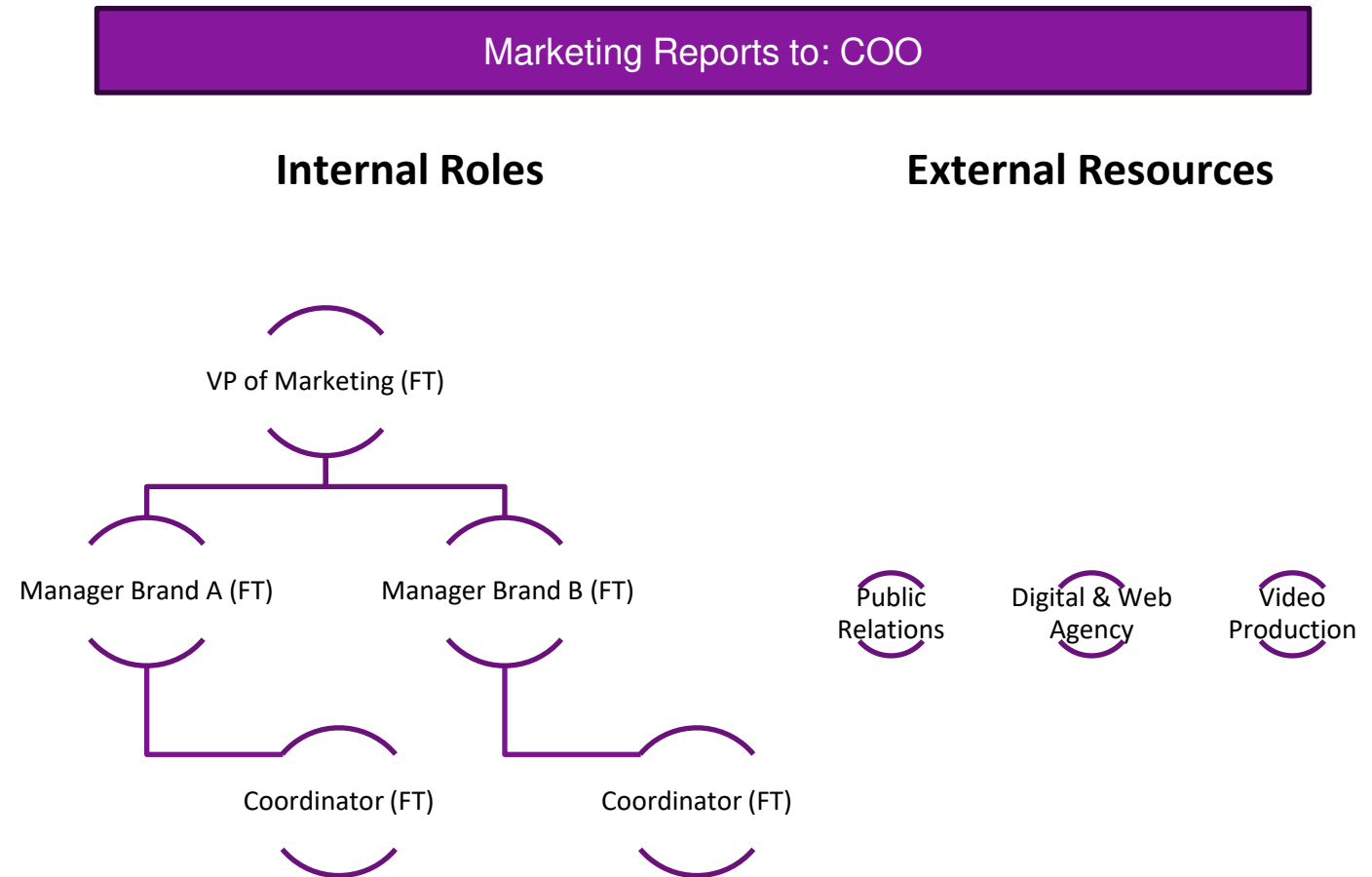
Marketing Roles by Level Guidelines

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

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



Recap – Team Structure

How you will resource marketing, including the relationships between activities, leadership and team members

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Thank You!