

SAMPLE FRAMEWORK TO ASSESS B2B MARKETING 'WORKLOAD & RESOURCE REALITY'



DOCUMENT THE LIKELY WORKLOAD NEEDED TO EXECUTE YOUR MARKETING PLAN (EFFECTIVELY) AND THE VARIETY OF SKILLS NEEDED



USE THIS AS A FRAMEWORK FOR DISCUSSION AND ANALYSIS TO DECIDE WHO SHOULD BE ACCOUNTABLE FOR THE WORK AS WELL AS WHO WILL MANAGE DETAILS OF EXECUTION (WHETHER FULL-TIME OR OUTSOURCED TALENT)



USE OUTPUT FROM STEPS 1 & 2 TO DECIDE FINAL ORGANIZATIONAL STRUCTURE, COMP PLANS, HIRING APPROACH, FUTURE STAFFING PROJECTIONS, ETC.

ACCOUNTABILITY EXAMPLES	TASK EXAMPLES	SKILLS NEEDED	WHO
 BRAND & MARKETING STRATEGY	<ul style="list-style-type: none"> • BRAND POSITIONING AND CORE MESSAGES (THAT ALL TEAM MEMBERS, WRITERS, DESIGNERS, ETC. WILL WORK FROM) • SBRANDING & MARCOM GUIDELINES (E.G. COLOR PALETTE, COMMUNICATION TEMPLATES, FONTS, GRAPHICS, ETC.); SOCIAL MEDIA POLICIES • METRIC GOALS AND BUDGET • LEAD MANAGEMENT REQUIREMENTS AND PROCESSES • MARKET AND CUSTOMER LOYALTY STRATEGY 	<ul style="list-style-type: none"> • BIG PICTURE, STRATEGIC, ANALYTICAL MINDSET • B2B "MODERN MARKETING" EXPERIENCE • ABILITY TO ORGANIZE/INTERPRET/TRANSLATE DATA, INSIGHTS AND IDEAS FOR TEAM, STAKEHOLDER AND SENIOR MANAGEMENT DISCUSSIONS 	?
 DATA & ANALYSIS, INFRASTRUCTURE AND PROCESSES	<ul style="list-style-type: none"> • CREATE ANALYTICAL FRAMEWORK TO SHOW WHAT TO MEASURE, WHY AND HOW • CREATE RULES, SPREADSHEETS, FEEDS, ETC. TO EASILY ORGANIZE, SEGMENT, VIEW AND TRACK DATA • CREATE DASHBOARDS AND REPORTS FOR VARIOUS STAKEHOLDERS • SUPPORT CREATION OR EVOLUTION OF LEAD MANAGEMENT INFRASTRUCTURE & WORKFLOWS 	<ul style="list-style-type: none"> • STRATEGIC ANALYTICAL ABILITY • STRONG WITH GOOGLE ANALYTICS, SPREADSHEETS, DATABASE MARKETING, REPORTING TECHNIQUES, ETC. 	?
 CAMPAIGN DESIGN AND EXECUTION	<ul style="list-style-type: none"> • RECOMMEND AND DESIGN SPECIFIC/MEASURABLE CAMPAIGNS TO MEET AN OBJECTIVE (E.G. CAMPAIGN TO GENERATE 100 NEW LEADS OR TO MEET OTHER METRIC GOALS) • MANAGE CAMPAIGN THRU EXECUTION, PARTNERING WITH OTHERS AS NEEDED (E.G. FOR CONTENT, COMMUNICATIONS, MEDIA PLACEMENTS, MEASUREMENT, ETC.) 	<ul style="list-style-type: none"> • UNDERSTANDS LEAD GEN BEST PRACTICES, DATABASE MARKETING, CRM, MARKETING AUTOMATION, MEDIA BUYING, PR, EMAIL, LANDING PAGES, SOCIAL MEDIA, ETC. • EXCEPTIONAL PROJECT MANAGER • CAN ENGAGE AND DIRECT DESIGNERS AND OTHER SUPPORT FUNCTIONS AS NEEDED 	?
 LEAD QUALIFICATION AND OUTREACH	<ul style="list-style-type: none"> • GATEKEEPER FOR NEW LEADS AND TOP-OF-THE-FUNNEL PROCESSES AND OUTREACH • OVERSEES WEBSITE CHAT FUNCTION 	<ul style="list-style-type: none"> • SALES ORIENTED, KNOWS HOW TO UNCOVER NEEDS AND UNDERLYING INTEREST • ABILITY TO WORK WITH CRM AND ESTABLISHED PROCESSES & WORKFLOWS 	?
 SALES SUPPORT AND PROJECT MANAGEMENT	<ul style="list-style-type: none"> • DEDICATED RESOURCE TO HELP SALES REPS EXECUTE THEIR PLANS • SOCIAL SELLING SUPPORT (E.G. TO OPTIMIZE LINKEDIN AS A CHANNEL FOR BUILDING RELATIONSHIPS) • SALES PRESENTATIONS, EMAILS, AND OTHER DIRECT COMMUNICATIONS • EVENT PLANNING, E.G. SALES WORKSHOPS, TRADESHOWS, WEBINARS, EXECUTIVE ROUNDTABLES, ETC. • DATA MINING, ANALYSIS, CRM OPTIMIZATION 	<ul style="list-style-type: none"> • TACTICAL WHILE ALSO UNDERSTANDING STRATEGIC OBJECTIVES AND THE NEED TO INTEGRATE WITH OTHER MARKETING AREAS (E.G. PRODUCT MARKETING, CORPORATE MARKETING) • CREATIVE WITH CONTENT; CAN RUN WITH TACTICAL IDEAS USING CORPORATE GUIDELINES AND AGENCY SUPPORT 	?
 CONTENT & COMMUNICATIONS STRATEGY	<ul style="list-style-type: none"> • DRIVE THE BROADER STRATEGY FOR WHAT AND WHY AS IT RELATES TO CONTENT AND COMMUNICATIONS • COORDINATE DATA, RESEARCH, TEAM INPUT, ETC. TO INFORM STRATEGY • ACCOUNTABILITY FOR PLAN, SCHEDULE, EXECUTION AND INTEGRATION 	<ul style="list-style-type: none"> • MORE THAN A MARCOM MANAGER OR WRITER; THINKS BIG PICTURE AND CONSIDERS CONTENT FROM THE AUDIENCE POV AS WELL AS SALES/SERVICE GOALS • ABILITY TO SYNTHESIZE DATA TO MAKE CREATIVE DECISIONS ABOUT CONTENT'S ROLE IN MOVING THE BUSINESS FORWARD 	?
 CONTENT & COMMUNICATIONS DEVELOPMENT	<ul style="list-style-type: none"> • OVERSEE AND MANAGE THE CONFIRMED CONTENT STRATEGY • OVERSEE EXECUTION OF ALL MARKETING CONTENT AS WELL AS CUSTOMER, EMPLOYEE OR INVESTOR COMMUNICATIONS • SUPPORT EXECUTION OF PRODUCT-SPECIFIC COMMUNICATIONS AND CONTENT (INC. SPEC SHEETS, PRODUCT PRESENTATIONS, WHITE PAPERS, ETC.) OR CONTENT FOR SALES CAMPAIGNS 	<ul style="list-style-type: none"> • WILLING TO TAKE EXECUTION RESPONSIBILITY FOR ALL COMMUNICATIONS • CAN WORK CROSS-FUNCTIONALLY TO ENSURE ALL STAKEHOLDER NEEDS ARE MET • ABLE TO DEVELOP AND MANAGE CONTENT PRODUCTION WORKFLOWS, EDITORIAL CALENDARS AND APPLICABLE ANALYTICS 	?
 PRODUCT MANAGEMENT	<ul style="list-style-type: none"> • MANAGE THE ROLLOUT, MAINTENANCE AND USER EXPERIENCE FOR PRODUCT OR SERVICE OFFERINGS • PARTNER WITH MARKETING HEADS TO DEVELOP POSITIONING AND CORE CONTENT • PARTNER WITH STAKEHOLDERS AS NEEDED 	<ul style="list-style-type: none"> • PRODUCT (AND VARIOUS TECHNICAL) EXPERTISE • DEEP INSIGHT INTO CUSTOMER NEEDS AND MOTIVATIONS • ABILITY TO PARTNER AND COLLABORATE FOR MESSAGING, SUBJECT-MATTER-EXPERTISE AND CUSTOMER EXPERIENCE 	?



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