# Step 1: Set Accurate Expectations For How Quickly Things Can Get Done

*How long will it take until you can see results?*

List all the goals you want to achieve with your marketing plan and define a feasible timeframe in which you can see results, for example:

* Traffic:
* Social shares:
* Email subscribers:
* Qualified leads:
* Sales calls:
* Revenue:

# Step 2: Determine Which Resources Will Be Needed to Execute the Plan

*Which skills and software do you need in order to implement your marketing plan?*

List all of the skills you need, the details, and whether you plan to hire for it in house or through external agencies and consultants.

|  |  |  |  |
| --- | --- | --- | --- |
| Skill | Details | In house? | External |
| **Content creation** | Blog posts, website content, landing page copy, social media posts  Writing, editing, etc. |  |  |
| **Graphic design** | Charts, infographics, social media images, etc. |  |  |
| **Technical skills** | Technical SEO, custom elements for website, etc. |  |  |
| **Social media management** | Scheduling content, managing comments and replies, platform analytics, etc. |  |  |
| **Project management** | Setting deadlines and milestones, keeping projects on track, etc. |  |  |

List all of your software options, work with your team to pick them, and define who needs access to which tool:

|  |  |  |  |
| --- | --- | --- | --- |
| Categories | Proposed tools | Chosen tool | Team members that need access |
| **Marketing project planning and management** |  |  |  |
| **Content management system** |  |  |  |
| **Social media management** |  |  |  |
| **Email marketing** |  |  |  |
| **Social listening** |  |  |  |
| **Search engine optimization** |  |  |  |
| **Video hosting** |  |  |  |
| **Landing pages** |  |  |  |
| **Marketing automation** |  |  |  |
| **Analytics** |  |  |  |

# Step 3: Document a Marketing Strategy

*What guides your strategy to produce result-creating content?*

* Document your strategy in a separate document. Here is a great resource to help you get started: <https://coschedule.com/marketing-strategy/>

# Step 4: Build a Workflow For Executing Each Piece of Content

*How is your strategy translating into tasks on your team’s calendars?*

Build a workflow for every type of content you create. Follow these steps:

1. Map out everything that needs to be done.
2. Reduce the number of steps in your workflow (for example, those that used to be useful but aren’t anymore, or that fall into other processes and will happen regardless).
3. Combine steps into tasks with clear action verbs.
4. Give each task a clear definition of done.
5. Choose who will complete each task.
6. Determine how long it takes to complete each task.
7. Plan how many days before publishing the task needs to be done.
8. Delegate by notifying, reminding, and collaborating with task owners.

As you follow these steps, outline each workflow in this format:

[Type of content] workflow map:

* Name of task #1 (person responsible – time it takes to complete – number of days to complete it by before publish)
  + How will the task owner know for sure that the task is done?
* Name of task #2 (person responsible – time it takes to complete – number of days to complete it by before publish)
  + How will the task owner know for sure that the task is done?
* Name of task #3 (person responsible – time it takes to complete – number of days to complete it by before publish)
  + How will the task owner know for sure that the task is done?
* …

# Step 5: Have a Plan For How You’ll Manage Projects

*How will you keep your projects on track?*

To implement agile marketing into your workflows, answer the following questions and put your answers into practice:

* Which roles are essential on your team for it to work as a cross-functional marketing team?
* In sprint planning, who will set goals, create a backlog of tasks, assign them, and determine the sprint length? Which roadblocks could your team run into?
* What is the structure for your daily meetings?
* Which task-based checklists can you develop?
* How will you structure your retrospective meeting at the end of a sprint?

List your answers here:

# Step 6: Measure Your Results

*What can you improve going forward?*

Answer these questions to measure your marketing implementation results:

* Are your marketing projects yielding results in the timeframe you’ve set expectations for? Does the timeline need adjustments?
* Does your team still cover all the skills you need? Do you need to hire internally or outsource a certain project or process?
* Is your software stack still the best one for the work you want your team to accomplish?
* Is your team still relying on your marketing strategy? Is there something in your marketing strategy that isn’t working and needs to be refreshed?
* Are the steps in all your workflows still effective? Do they need to be revised?
* Does your project management strategy work for you and your team?
* How does your team feel about the process and do they have suggestions and actionable feedback?

List your answers here: