CoSchedule

How To Create A Marketing Strategy That Will

Skyrocket Your Results By 9,360%

Tasked with creating a marketing strategy?

It can be tough to even know where to begin.

Trust me. I've been there.

So I've read blog posts, articles, and books. I've taken courses. I've watched videos. I've listened to podcasts. I've learned, tested, iterated, and improved upon all of it.

And I'm sharing everything I've learned about marketing strategy in this ultimate, comprehensive guide.

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Read through the chapters now to:

Forget the noise surrounding marketing strategy.

So much content tells you what to do, but most of it totally neglects teaching you how to do it. Learn everything from 'what' to 'how' with the complete, actionable, practical, and realistic advice you'll find in this comprehensive guide.

Get real-life, market-tested advice that skyrockets results by as much as 9,360%.

This isn't your average blog post on marketing strategy… this guide is full of personal anecdotes, tactics, methods, hacks, processes, exercises, and frameworks that have proven to help the team and me grow CoSchedule's results by nearly 10,000%. Seriously.

Leave with a marketing strategy you'll actually—and realistically—execute.

Put what you learn into practice immediately with free downloadable + editable marketing strategy templates in the form of PowerPoint decks and Excel spreadsheets.

When I started at CoSchedule in November 2014, we had a few thousand page views, about the same amount of email subscribers, and a couple thousand customers.

Today, CoSchedule has 250,000+ email subscribers, more than 1.3 million monthly page views, and 9,000+ customers in 100+ countries around the world.

The marketing strategy you're about to learn has helped me generate 434% more page views, 1,222% more email subscribers, and a whopping 9,360% more marketing-qualified leads.

A lot of that success has to do with marketing an exceptional product. And some of it has to do with creating a marketing strategy that connects with the right target audience.

^^^ I'm sharing everything I know about marketing strategy. And I wish I had found a guide like this when I got started in marketing.

That's why I'm doing you the favor and giving it to you now.

Marketing Strategy Overview

Some of the advice you'll learn in this guide may go against everything you've learned.

Other parts of it may reiterate what you already know.

The point is: This stuff works. And you're not going to learn about the same BS things just because everyone else talks about them.

Let's get started.

What Is Marketing Strategy?

> *Marketing strategy is the guide that helps marketers choose, prioritize, plan, and execute projects to influence profitable customer action.*

While some document their marketing strategy in the form of a marketing plan, this is not a requirement. Strategic direction doesn't require documentation.

However, there is evidence to suggest that marketers who document their marketing strategy are more likely to reach their goals. So this guide comes complete with a marketing strategy template kit to help you put what you learn into practice immediately.

Why Do I Need A Marketing Strategy

Marketing is not about producing content. Marketing is about producing content that produces results.

Marketing strategy provides the roadmap for you and your team to execute well-planned projects you'll measure against a clearly defined goal.

This process not only helps you target the *right audience* with the *right* content and the right level of effort, but helps you literally understand the impact marketing projects have upon the growth of your organization.

^^^ And that growth is what your boss is looking for. Proving you've done it with marketing makes you look like a rock star.

Can I create a Marketing Strategy Myself?

Absolutely. This comprehensive + actionable guide exists to help you create a marketing strategy without the assistance of a third-party vendor.

Use the free marketing strategy template kit available within this guide to start immediately.

The kit includes these 10 marketing strategy templates:

1. Marketing strategy outline template
2. Marketing goal tracking template
3. SWOT analysis template
4. Marketing persona template
5. Brand positioning template
6. Brand voice template
7. Marketing tactics list
8. Project prioritization template
9. Marketing budget template
10. Project timeline template

All of these templates are available in an editable PowerPoint deck and an Excel spreadsheet so you can tailor your marketing strategy specifically for your organization.

What Will I Learn From This Ultimate Guide?

You will learn the *why, what,* and *how* to plan your marketing strategy from scratch.

Let's get started!

CHAPTER 1

How To Set SMART Marketing Goals

What Are Marketing Goals?

Your marketing goal is a specific, measurable, aspirational, realistic, and time-bound metric that drives every marketing effort.

SMART stands for specific, measurable, aspirational, realistic, and time-bound:

- **Specific:** Your goal must focus on one clearly defined metric.
- **Measurable:** You must have a way to measure the content you publish against that metric.
- **Aspirational:** Your goal must push you beyond the results your content will naturally or organically generate toward that metric.
- **Realistic:** In the same breath, keep your aspiration in check with what you can reasonably complete with the resources that are (or will be) available to you.
- **Time-bound:** Your goal must have an end date upon which you will achieve that metric.

Marketers who write down their goals and objectives are more likely to make them a reality. So follow this framework to write yours:

By {insert day, month, year}, the {insert your organization's name} marketing team will reach {insert number} {insert metric} every {insert time frame}.

Here's a marketing goal example written using that framework to give you more context:

By December 31, 2018, the CoSchedule marketing team will reach 6,000 marketing-qualified leads every month.

In that example, the goal is to influence marketing-qualified leads. Remember, the point of your marketing strategy is to choose, prioritize, plan, and execute projects to influence profitable customer action.

Therefore, marketing metrics closer to the ultimate purchase are often the best goals to set.

However, all goal setting influences the right kinds of behavior. And when you're just beginning, you may opt to focus on other metrics.

Therefore, here are several other marketing goals examples listed from awareness to closest to the purchase:

- Page views
- Email subscribers
- Trial signups
- Purchases

Choose your marketing goal metric.

How To Set Marketing Goals

The 10x growth framework suggests focusing on the aspirational part of the goal as much as possible. Therefore, you may opt to calculate your goal with this formula:

Average Current Monthly Contribution To Metric × 10 = Marketing Goal

For example, that would like this this in practice:

> *600 marketing-qualified leads in an average month × 10 = 6,000 marketing-qualified leads per month goal*

For some marketers, however, increasing your goal 10 times over may be unrealistic.

^^^ If you fall into this category, change the 10 to a number that makes your aspirational goal realistic.

The point here is to **define an end number that is aspirational but within your practical means of achievement.**

As you communicate this number to your team, you will influence the right behavior. And the right behavior often produces the right results.

Amortize Your Marketing Goal Across Your Time-Bound Deadline

If you haven't already, check out the the marketing strategy template kit that was included with this guide.

The first tab of the marketing strategy template spreadsheet is labeled Goal Tracking.

Goal Tracking

Assumptions	2
Start Goal	600
Final Goal	6,000
Stretch Goal	7,000
Months To Complete Goal	12

	January	February	March	April	May	June	July	August	September	October	November	December
Final Goal	638	750	938	1,200	1,538	1,950	2,438	3,000	3,638	4,350	5,138	6,000
Actual MTD	300.00											
% Complete Toward Goal	47.06%											
% Through Month	22.58%											
Stretch Goal	644	778	1,000	1,311	1,711	2,200	2,778	3,444	4,200	5,044	5,978	7,000
% Complete Toward Stretch Goal	46.55%											
Month #	1	2	3	4	5	6	7	8	9	10	11	12
	50%	55%	59%	64%	68%	73%	77%	82%	86%	91%	95%	100%

Look at the **Assumptions** area in columns A-C, and fill in the goal numbers and time frame in which you'd like to complete the goal.

Enter your **Start Goal** number in cell C6. This is the amount you influenced toward your goal either the prior month, or you may opt to average several prior months of data.

For our marketing goal example, the Start Goal is 600, which is the average number of marketing-qualified leads generated in the months of October, November, and December.

Enter your **Final Goal** number in cell C7. This is the number you want to influence by the end of your time-bound deadline.

Back to the marketing goal example, the Final Goal is 6,000. That's to say, you want 6,000 marketing-qualified leads by December 31, 2018, which is the end of the time-bound deadline you defined in your SMART marketing goal statement.

If you'd like to define a Stretch Goal, enter it in cell C8. This is basically 10x-ing your 10x goal.

In the example, the **Stretch Goal** is 7,000. That means you want 7,000 marketing-qualified leads by the end of 2018.

The **Months To Complete Goal** indicates how many months you'll need to complete the goal.

In the example, the spreadsheet is set up for 12 months, suggesting you'll start working toward completing the goal in January and reach the goal in December.

At this point, you'll notice the **Final Goal** and **Stretch Goal** numbers in the December column Q match what you entered in the Final Goal and Stretch Goal cells in the Assumptions area. The months leading to December amortize toward that goal, suggesting continuous growth every month leading toward the end of the time-bound structure of your goal setting process.

The marketing goal amortization formula looks like this:

(Final Goal - Start Goal) × (month number / months to complete goal) ^ 2 assumption + start goal = goal conversion goal for a specific month

Congrats! You just set marketing goals for every month for an entire year. Continue on to Chapter 2 to learn how to track and measure your content's impact upon that goal.

CHAPTER 2

How To Do A SWOT Analysis

What Is A SWOT Analysis?

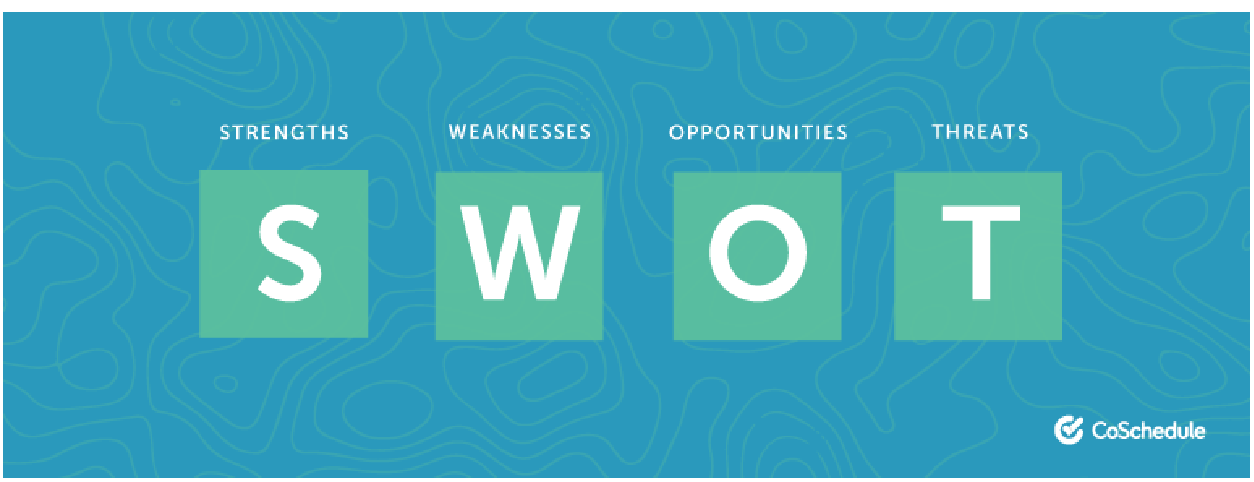
A SWOT analysis helps you understand internal and external factors that can make or break your success toward your marketing goal. SWOT is an acronym that stands for strengths, weaknesses, opportunities, and threats.

The SWOT analysis process is a brainstorming technique. It's designed to help you understand what might differentiate you from your competition and what resources you have to execute upon that opportunity. In the same breath, the SWOT framework helps you understand what might prevent you from seizing that opportunity.

The four areas it encompasses are meant to help you explore internal and external factors:

Internal (your resources)
- Strengths
- Weaknesses

External (market, competition, etc.)
- Opportunities
- Threats



What Are Your Strengths?

Ask yourself:

- What advantages do we have to make the marketing goal a reality?
- What tools do we have available to help us reach the marketing goal?
- What unique differentiators will help us?
- What resources (people + time) will help us?
- How may we leverage our existing audience to reach the goal?

Open your marketing strategy template spreadsheet and click on the **SWOT Analysis tab**. Enter in your strengths in Column A rows 5-23.

What Are Your Weaknesses?

Ask yourself:

- What improvements could we make?
- What's not going so well right now?
- What factors may suck time away from the work we'd do to make the goal a reality?
- What tech limitations may prevent us from achieving the goal?

Enter your weaknesses in Column B rows 5-23 in the SWOT Analysis tab of your marketing strategy spreadsheet.

What Are Your Opportunities?

Ask yourself:

- What content isn't our competition publishing?
- What kind of stories isn't our competition sharing?
- What new trends could we capitalize upon?
- What could we do to get 10x results with 10% of the work?

Fill in Column A rows 25-43 with your opportunities.

What Are Your Threats?

- What market conditions (or audience sentiment) may prevent us from achieving the marketing goal?
- What are we doing that our competition is also doing?
- What is our competition currently doing better than us?

Enter your threats in Column B rows 25-43.

Now that you've worked through your rough ideas for your SWOT analysis, you may also opt to enter a cleaner version of these points in the editable PowerPoint deck also available in the marketing strategy template kit.

This will help you present your marketing strategy to team members and stakeholders in a format that's a little easier on the eyes.

A SWOT Analysis Example

Let's dive back into the CoSchedule example. If CoSchedule wants to hit the goal of 6,000 marketing-qualified leads by December 31, 2018, the SWOT Analysis may look something like this:

Strengths

- Audience of 200,000+ professional marketers.
- We use the tools designed to do the job (no hacks or cobbling things together that "just work").
- CoSchedule's standards of performance help us publish better content than any competitor.

Weaknesses

- We should publish more content faster. We can improve our efficiency while still publishing effective content.
- We need to explore new 10x ideas faster to scale beyond the blog and advertising.

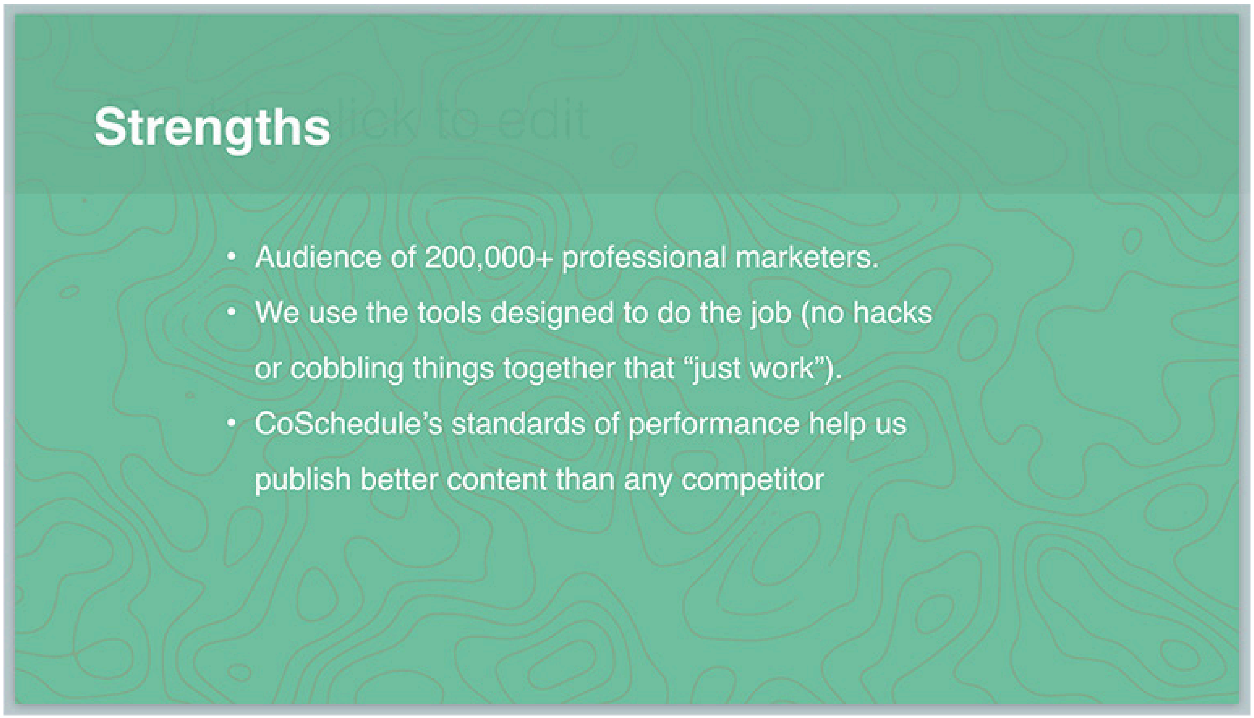
Opportunities

- The competition isn't exploring new content delivery methodology (courses, ultimate guides, etc.).
- No one seems to focus on helping marketing managers actually plan, strategize, and execute more efficiently + effectively with how-to methodology.

Threats

- All of our competition is blogging and doing paid advertising.
- Our competition outranks with domain authority + many search results we'd like to own.

This is what that SWOT analysis example looks like in the PowerPoint deck available in that marketing strategy kit:



Now, there are likely many more thoughts to list under all of these areas. However, I recommend drilling into only a few factors to capitalize on (strengths + opportunities) and mitigate (weaknesses + threats).

This way, you don't stretch your resources so thin that it's nearly impossible to dramatically influence what could really help you make the marketing goal a reality.

Doing fewer things well often produces better results.

Now you have a clear understanding what the factors that will make or break your success:

- Capitalize on your strengths + opportunities
- Mitigate your weaknesses + threats

Congrats! You've found your unique differentiators and understand how you'll compete with your marketing.

Continue to Chapter 3 to find your ideal audience and create a marketing persona to capitalize on the opportunity.

How To Find Your Target Audience With A Marketing Persona

What Is A Target Audience?

Your target audience is the ideal customer you want to attract to your product or service through your marketing efforts.

The practice of understanding your target audience, the words they use, the benefits they enjoy, and why they hire your product or service will help you create content that connects.

This knowledge becomes actionable for your marketing team when you document it in the form of a marketing persona.

What Is A Marketing Persona?

Your marketing persona is a document that details your target audience's who, what, when, where, and why, in addition to understanding general demographics information such as gender, job title, job function, business size, team size, needs, pain points, and challenges.

Define Your Target Audience

The goal here is to attract more customers who have similar goals, aspirations, pain points, and challenges as your best customers.

Begin by asking yourself:

- Who are our existing best customers?
- What qualities do these customers share?
- What caused these customers search for a solution like our product or service?
- Why did they hire our product or service?
- What do these customers gain by choosing us (instead of the competition)?

From here, craft your target audience statement:

{Insert your company} creates content to attract {insert target audience} so they can {insert desired outcome} better.

For example, this is what the target audience statement may look like for CoSchedule:

CoSchedule creates content to attract professional marketing managers so they can get organized better than ever.

This framework will help your marketing team craft effective content in the meantime. So use this process to help you start.

But you can also dive further into audience research to document your target audience in the form of a marketing persona much more robustly.

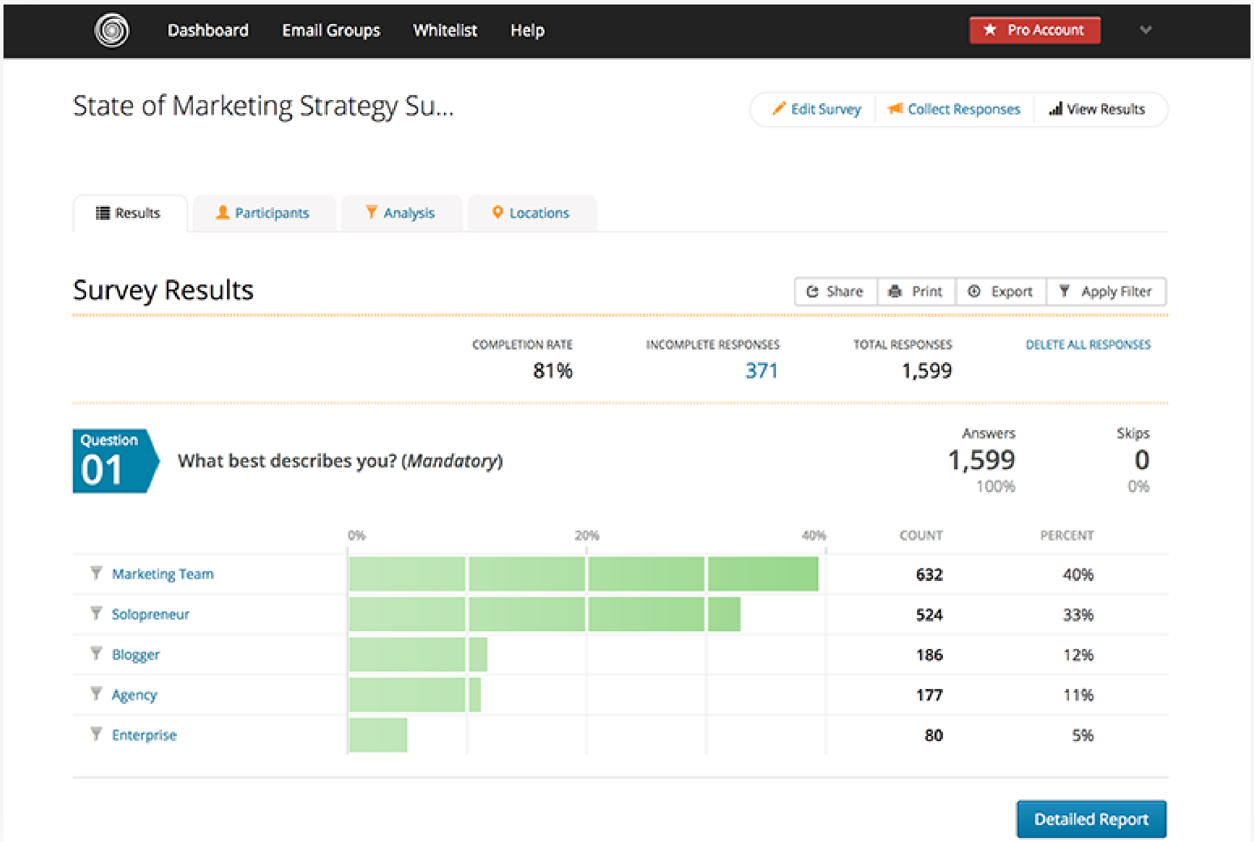
Launch A Customer Survey

The best way to reach an audience like your existing best customers is to understand why your current customers hire your product.

Use a tool like SurveyMonkey or Polldaddy to ask your customers questions like:

- What is the primary reason you use {insert your product or service}?
- Why did you choose {insert your product or service} over other solutions?
- What is the most significant difference {insert your product or service} is making for you today?
- If you didn’t use {insert your product or service}, what would you most likely use instead? / What would you likely use as an alternative if {insert your product or service} were no longer available?
- How would you (briefly) describe {insert your product or service} to someone else?
- What is the single greatest benefit {insert your product or service} provides? / What is the primary benefit you have received from {insert your product or service}?

- What prompted you to look for a solution like {insert your product or service}?
- How many people work at your business?
- How many people work on your team?
- What blogs or publications do you enjoy?



Dissect the results for trends and commonalities in word choice, pain points, challenges, benefits, and emotions, and include them in your marketing persona template.

The easiest way to distribute that survey link is via email. Here's an email template you can copy + paste into your email service provider to easily send to your customer list:

> Subject line: Quick favor?
>
> Hi {insert customer name}
>
> Thank you for joining us at {insert your company name}. Most of our customers tell us that with {insert your product or service}, they {insert primary benefit}. I hope you have the same success!
>
> Right now, I want you to do one thing:
>
> Take this quick survey to help me understand why you signed up for {insert your product or service}. It's 2 minutes. No joke.
>
> I'm asking because knowing what made you sign up is really helpful for us in making sure that we're delivering on what our customers want.
>
> Thanks!
> {Insert your name}
>
> P.S. You just found the best {insert your unique product or service category} around. I hope you enjoy it and decide to stick around!

Write Your Marketing Persona

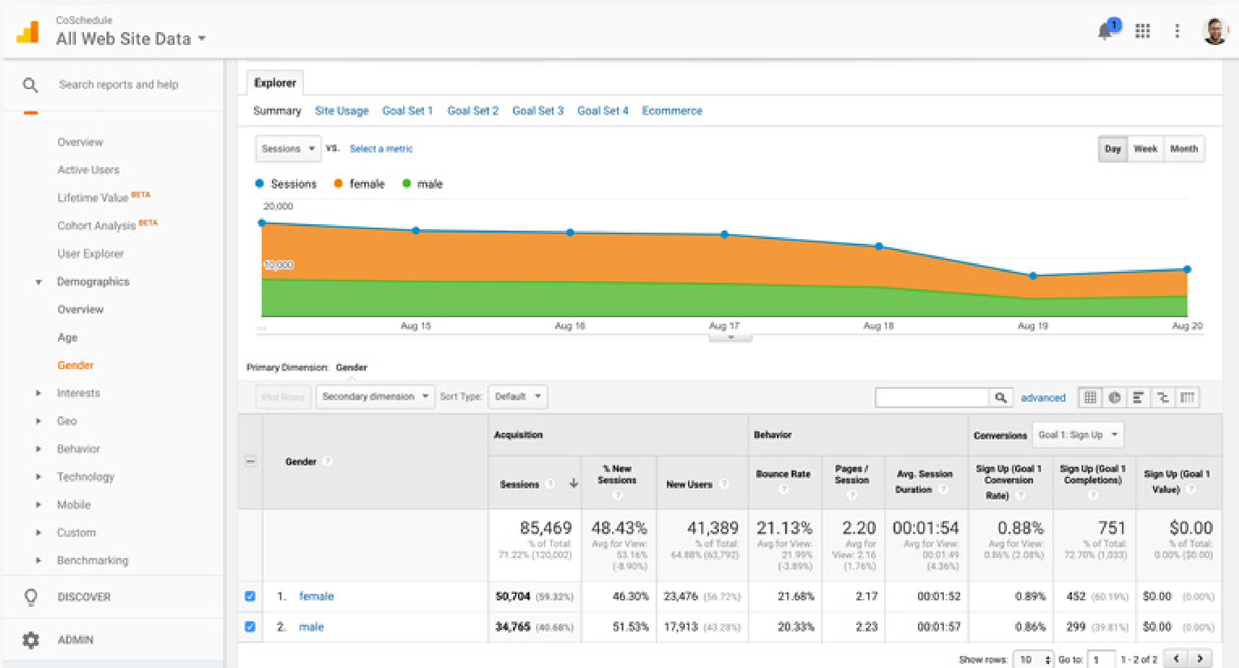
Open your marketing strategy template spreadsheet and click on the Marketing Persona tab.

Fill in the Target Audience Statement in cell B5. As a reminder, that statement looks something like this:

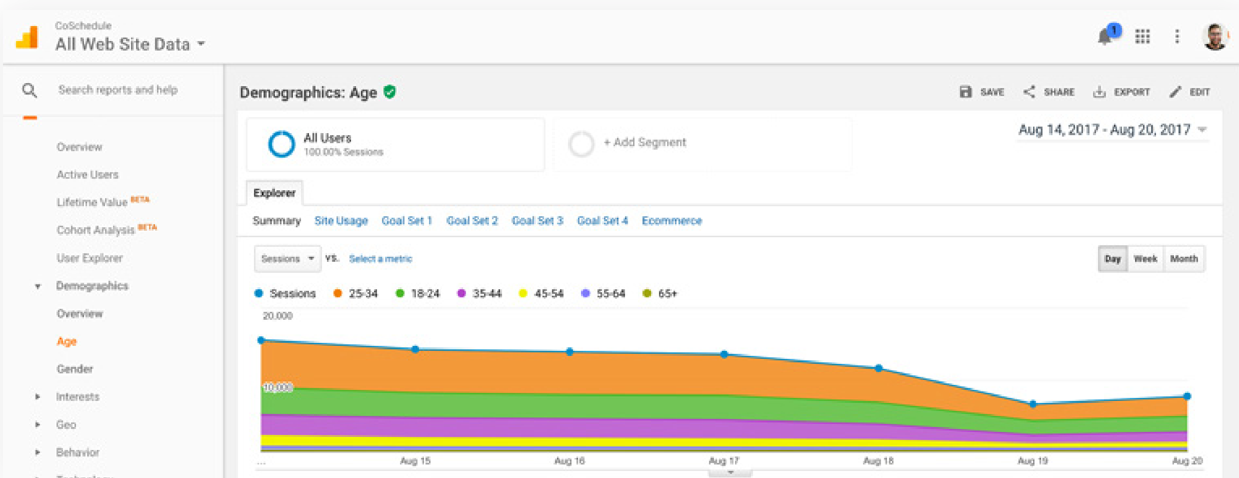
{Insert your company} creates content to attract {insert target audience} so they can {insert desired outcome} better.

Use Google Analytics to understand your existing audience's demographics such as age and gender.

Cruise to the **Audience** and **Demographics** area and select **Gender** to see who you primarily attract. Fill in cell B11.



Then click **Age** in the Demographics area. Fill in cell B12.



From here, I like to do some simple math to find the **Persona name**.

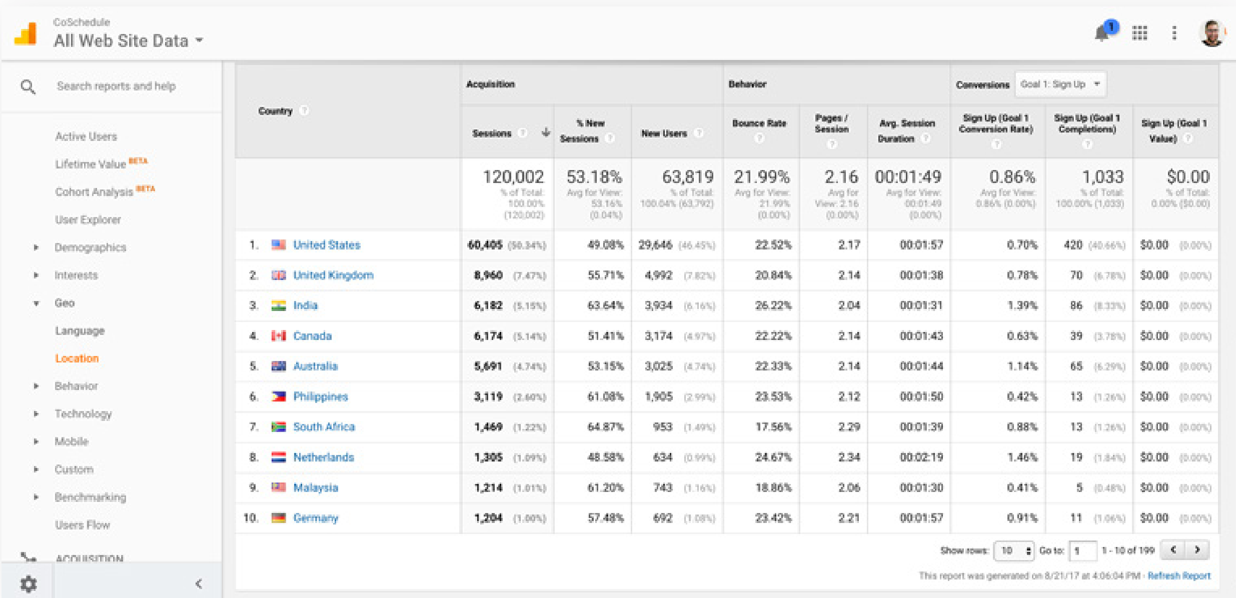
For example, let's say CoSchedule's primary visitor is a 29-year-old female. The current year minus her age would suggest she's born in 1989. You can use a website like BabyNames.it to find the most common girl name of that year, which happens to be Jessica for our example.

Enter in your persona name in cell B8.

Fill in the **Job title** and **Job responsibilities** fields based on your understanding of the ideal customer in cells B9 and B10, respectively.

Use the data you gathered from your customer survey to enter the **Company size** and **Team size** (applicable if you're a business-to-business marketer).

Use Google Analytics once again to find the location where the majority of your audience is from. In **Audience**, select **Geo** and **Location** to drill into the geography.



Country	Sessions	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration	Sign Up (Goal 1 Conversion Rate)	Sign Up (Goal 1 Completions)	Sign Up (Goal 1 Value)
	120,002 % of Total: 100.00% (120,002)	53.18% Avg for View: 53.16% (0.04%)	63,819 % of Total: 100.04% (63,792)	21.99% Avg for View: 21.99% (0.00%)	2.16 Avg for View: 2.16 (0.00%)	00:01:49 Avg for View: 00:01:49 (0.00%)	0.86% Avg for View: 0.86% (0.00%)	1,033 % of Total: 100.00% (1,033)	$0.00 % of Total: 0.00% ($0.00)
1. United States	60,405 (50.34%)	49.08%	29,646 (46.45%)	22.52%	2.17	00:01:57	0.70%	420 (40.66%)	$0.00 (0.00%)
2. United Kingdom	8,960 (7.47%)	55.71%	4,992 (7.82%)	20.84%	2.14	00:01:38	0.78%	70 (6.78%)	$0.00 (0.00%)
3. India	6,182 (5.15%)	63.64%	3,934 (6.16%)	26.22%	2.04	00:01:31	1.39%	86 (8.33%)	$0.00 (0.00%)
4. Canada	6,174 (5.14%)	51.41%	3,174 (4.97%)	22.22%	2.14	00:01:43	0.63%	39 (3.78%)	$0.00 (0.00%)
5. Australia	5,691 (4.74%)	53.15%	3,025 (4.74%)	22.33%	2.14	00:01:44	1.14%	65 (6.29%)	$0.00 (0.00%)
6. Philippines	3,119 (2.60%)	61.08%	1,905 (2.99%)	23.53%	2.12	00:01:50	0.42%	13 (1.26%)	$0.00 (0.00%)
7. South Africa	1,469 (1.22%)	64.87%	953 (1.49%)	17.56%	2.29	00:01:39	0.88%	13 (1.26%)	$0.00 (0.00%)
8. Netherlands	1,305 (1.09%)	48.58%	634 (0.99%)	24.67%	2.34	00:02:19	1.46%	19 (1.84%)	$0.00 (0.00%)
9. Malaysia	1,214 (1.01%)	61.20%	743 (1.16%)	18.86%	2.06	00:01:30	0.41%	5 (0.48%)	$0.00 (0.00%)
10. Germany	1,204 (1.00%)	57.48%	692 (1.08%)	23.42%	2.21	00:01:57	0.91%	11 (1.06%)	$0.00 (0.00%)

Fill in cell B17.

Then use the information from your customer survey to flesh out the rest of the marketing persona in the Emotion area, cells B20-25:

- Reason they search for a solution
- Why they choose your product or service
- #1 benefit they gain from your product or service
- Closest competitors they'd consider
- A customer quote (written using common words)
- Favorite blogs + publications they enjoy

Once you have a rough draft of your marketing persona prepared in the marketing strategy template spreadsheet, you may opt to transfer these thoughts into the designed marketing persona PowerPoint deck also available in the marketing strategy template kit you've already downloaded.

^^^ This gives you a nice visual way to introduce your team to your marketing persona.

Congrats! You just defined your target audience and wrote a marketing persona to help you attract more folks to your brand that are like your existing best customers!

Continue to Chapter 4 to define your brand positioning and brand voice.

CHAPTER 4

How to Select Effective Marketing Channels

Marketers can reach consumers in more ways than ever. With so many different options, it's easy to get overwhelmed. You want to make sure you spend your time and money on the most impactful channels and tactics. But, without knowledge of what will work best, it's easy to let fear stop you from starting.

Here's some good news, though: selecting marketing channels doesn't have to be rocket science.

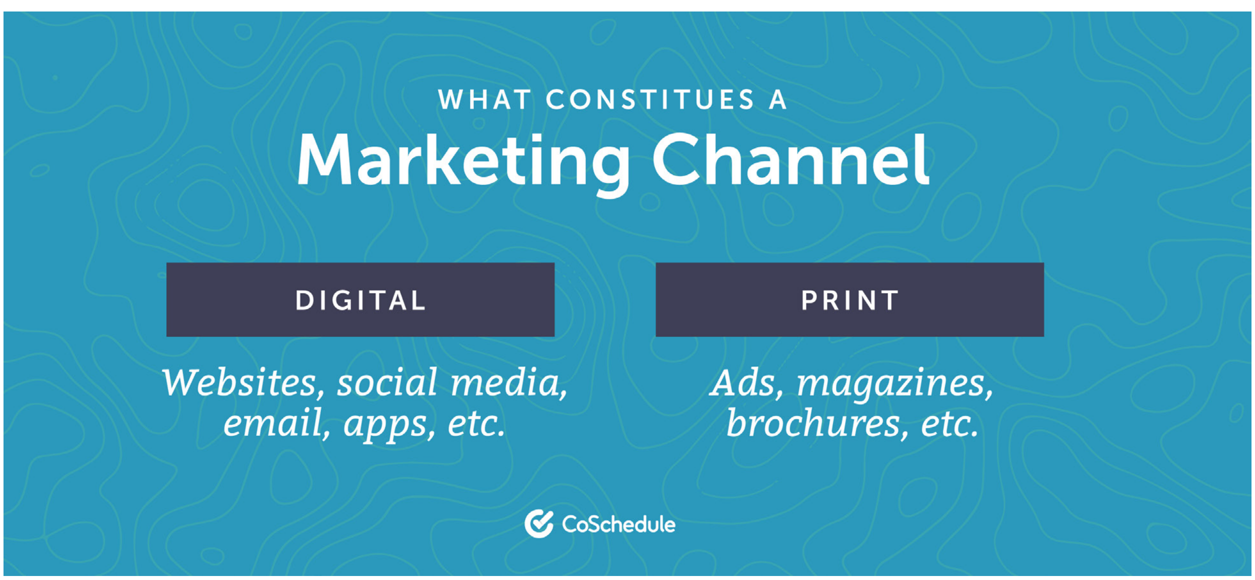
You might hear a lot of chatter about emerging technologies like AI and chatbots. But, unless you're a very advanced marketer or at a large company, those types of tactics are likely out of your reach. That's okay, though, because you don't need the flashiest new thing to succeed.

What's important isn't focusing on every new channel. **It's focusing on the right channels to maximize the growth of your business.** And in this section, you'll discover where you should be directing your effort and attention to make the most impact.

What Constitutes A Marketing Channel?

A marketing channel can mean any method or platform used for marketing activities. This could include:

- **Digital marketing channels:** Websites, social media, email, apps, etc.
- **Print marketing channels:** Ads, magazines, brochures, etc.



Examples Of Marketing Channels

First, take a look at this comprehensive list of potential platforms and means of consumer communication:

1. Affiliate marketing.
2. Amazon storefront.
3. Apps.
4. Blogs.
5. Websites.
6. Email.
7. Social media networks.
8. Events.
9. TV Commercials.
10. Online video.
11. Microsites.
12. Mobile ads.
13. Social media ads.
14. Press releases.
15. QR codes.
16. Chatbots.
17. Webinars.
18. Print ads.
19. In-store signage.
20. Direct sales.
21. Radio ads.
22. Point of sale displays.
23. Print catalogs.
24. Contests.
25. SMS marketing.
26. Near-Field Communications (NFC).
27. PR events.
28. Conference booths.
29. SEO.
30. PPC.
31. Mobile advertising.
32. RFID tags.

That's a long list, and it barely scratches the surface. Some of these could even be broken down more granularly (for example, there are lots of different social media networks, and each could be considered its own channel).

Which Ones Should You Focus On?

If that's enough to make your head spin, you're not alone. But, it illustrates how many mediums, formats, and channels exist, all competing for attention. Fortunately, you don't need to pay attention to every channel possible. In fact, trying to do so will almost certainly result in failure. It's better to master a few, than to spread yourself too thin.

These recommendations should not be considered firm requirements for marketing success. However, these channels are generally regarded as the most effective, for the most companies.

Website / Blog

A website is table stakes for any business. In a CoSchedule survey, 48% of marketers said blog posts were their primary content format. This ties into the next item on this list.

Search Engine Optimization

Where does most website traffic come from? According to SEO software provider Brightedge, a whopping 51%. Plus, 82% of marketers view their SEO efforts as being effective. This squares with CoSchedule research that found traffic is a top KPI for marketers (the second most common priority, behind lead generation).

Email Marketing

The marketing landscape changes frequently, and email is no exception. What has held steady, however, is the reliability and effectiveness of email marketing. According to Campaign Monitor, email drives $38 in revenue for every dollar spent. Other sources report similar findings (typically between 3,800 and 4,400% ROI). That is impossible to ignore.

Organic Social Media Marketing

Staying on top of social media trends is tough. Plus, with organic reach declining on platforms like Facebook, it can be challenging to succeed. However, social media still offers tons of brand value for smart companies to capitalize on.

However, it's important to approach social media with a smart strategy, in addition to a disciplined approach to channel selection. Choosing a small number of networks to master often produces better results than maintaining a presence on every platform.

Video / YouTube

Did you know YouTube is considered the world's second largest search engine? When you think about it, it's easy to see why. It's often easier to watch a video to learn how to perform a task, than to read an extensive piece of content on the same topic.

Consider this: LEGO is YouTube's most popular brand. It makes sense, though, because people want to know how to do fun things with those classic colored plastic blocks. In fact, according to Google, how-to searches on the platform have been increasing by 70%.

So, if your company can benefit from creating clear how-to content, YouTube is a channel that should be considered.

PPC

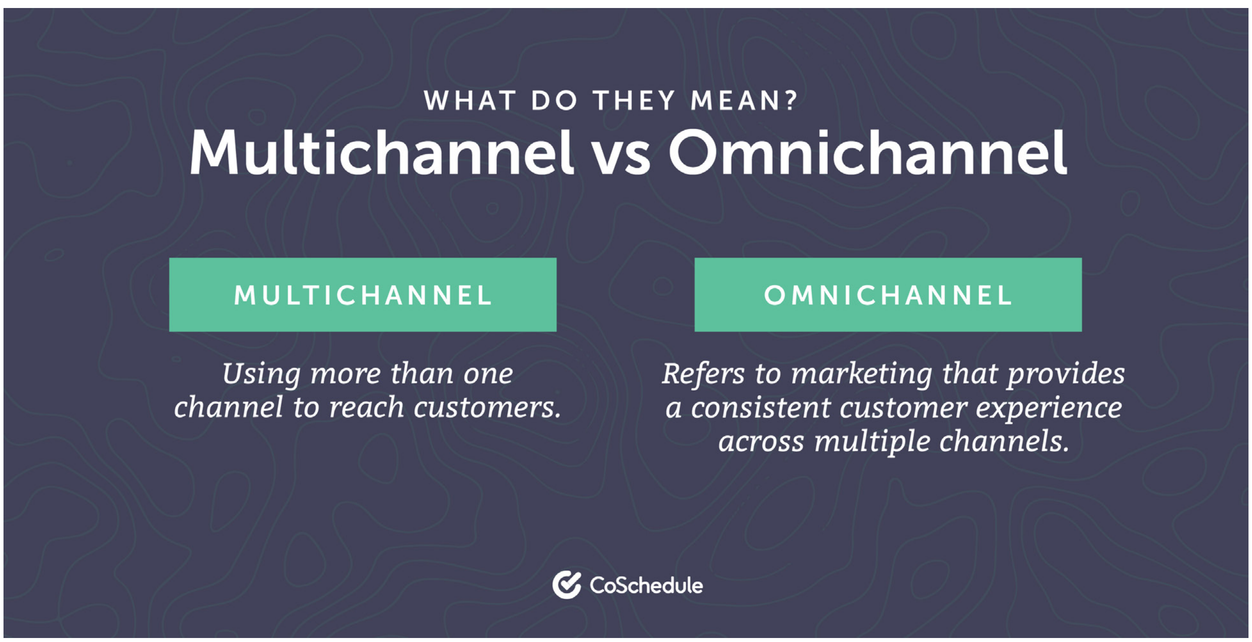
Organic traffic is great for building an audience. However, paid advertising works well (perhaps better, in some cases) for driving direct conversions. That's because consumers clicking ads are often ready to make a purchase. According to CleverClicks, PPC converts 50% more traffic than organic search. A complete search marketing strategy should include both organic and paid tactics.

Multichannel Vs. Omnichannel:

What Do Either Of These Terms Mean?

Spend time in the marketing blogosphere and you may encounter the words "multichannel" and "omnichannel." You might also scratch your head and wonder what either one of these terms mean. Here are quick definitions:

- **Multi-channel Marketing:** Using more than one channel to reach customers.
- **Omnichannel Marketing:** Refers to marketing that provides a consistent customer experience across multiple channels.



Is it important to understand these terms? To be blunt, not necessarily. If your brand standards are enforced across all your chosen channels, and you're using the right mediums to reach your customers, that is what matters most.

Determining The Channels You’ll Utilize

None of this needs to be set in stone. You can always add or subtract channels from your strategy in the future. For now, determine the following:

- Which channels you’re currently using.
- Which channels you’ll add to your strategy.
- Which channels you’ll consider putting on pause.

How To Evaluate The Effectiveness Of A Given Channel

In a word: **measurement.** This will be covered in a later chapter in this guide, but it’s worth briefly touching on this point. If a channel is not producing a measurable benefit, it’s time to recalibrate and reconsider whether it deserves a place in your strategy.

That’s A Wrap

There’s everything you need to know about marketing channels.

CHAPTER 5

How to Select the Best Marketing Metrics and KPIs to Monitor Your Progress

Marketing strategies start with clear goals. Before you can set goals, though, you need to know what to measure. That's where marketing metrics enter the picture.

Goal setting and metric selection go hand in hand. If goals are your destination, then metrics are like guideposts. They help indicate whether you're on the right track, and are progressing toward your goals. Conversely, they can also illustrate where things are going awry, so you can get back on track.

However, there are tons of different metrics you could potentially track. It's important to know which ones to pay attention to most, and understand what they mean for your marketing.

What Are Marketing Metrics?

A marketing metric is a quantifiable variable that can be measured to track performance.

Why Are Metrics Important For Marketers?

They aren't just important for you. They're immensely important for your entire business. Without them, it's impossible to know exactly what impact marketing has on the organization.

The marketing teams at CoSchedule make their metrics available company-wide for anyone curious to see their performance.

Examples Of Marketing Metrics

There are tons of different metrics a marketer could track. To make sorting through this list easier, it has been broken down into categories. There's no need to feel like you need to report on, or necessarily understand, all of these right now. Consider this a useful bookmarkable reference resource.

GENERAL MARKETING METRICS

Brand Awareness:
Measures the level of familiarity your target audience has around your brand or product.

Customer Lifetime Value:
How much revenue a business will generate per customer over that customer's lifetime.

Customer Acquisition Cost:
The expense of activities required to earn one customer.

Return on Investment:
How much revenue is generated per dollar spent on marketing.

Incremental Sales:
Tracks sales growth over time.

Conversion Rate:
The percentage of visits that result in a desired action (like completing a form or making a purchase).

Leads Generated:
The raw number of sales leads brought in by marketing.

Customer Share (By Category):
The percentage of customers in a given area or industry that are your customers vs. your competition.

Market Share:
The percentage of customers in a market that buy from you vs. your competition.

Lead Score:
A metric for determining how likely a potential customer will purchase.

Net Promoter Score
A tool used to measure customer loyalty and sentiment toward a brand.

WEBSITE AND BLOGGING METRICS

Referral Traffic:
Traffic referred to your site through another source (search engine, email, social media, etc).

Organic Traffic:
Unpaid traffic driven through search engines.

Total Visits:
The aggregate number of hits over a given time period.

Customer Attrition/Churn:
The rate of customer loss over time.

Time on Page:
The average amount of time visitors spend on a webpage before leaving.

Bounce Rate:
Tracks visitors who only view one page on your site before exiting.

Downloads:
The number of times downloadable assets and freebies are downloaded (like ebooks, templates, and other gated content).

First Visit:
The moment a new potential customer lands on your website for the first time.

Total Visits:
The aggregate number of hits over a given time period.

Customer Attrition/Churn:
The rate of customer loss over time.

First Visit:
The moment a new potential customer lands on your website for the first time.

Returning Visits:
All hits from visitors who have been to your site before.

Traffic Sources:
Places that refer traffic to your website or blog.

Click-Through Rate:
The percent of search engine queries that result in a click to your site.

Pageviews Per Session:
The number of pages an average visitor views on your site before leaving.

Unique Visitors:
The number of individual users that arrive on your site.

Sessions By Device Type:
How many visits a site receives, broken down by the type of device people used to access it (ex: Mac, Windows PC, iPhone, etc.).

Pageviews:
The total number of pages that have been viewed on a site.

Top Pages:
The pages that are driving the best performance, either by traffic, or conversion rate.

SEO METRICS

Keyword Rankings:
How high a page ranks in search engines for a given keyword.

Search Traffic:
The amount of referral traffic sent to a site through a search engine.

SERP Visibility

Total Backlinks:
The number of links pointing at a web page from other sites.

Domain Authority:
Measures how authoritative search engines view an entire website.

Page Authority:
Measures how authoritative search engines view a single webpage.

Page Load Speed:
How fast a website loads (which may impact search engine rankings).

Organic Click Through Rate:
How often searchers click a given page when it appears in search engine results.

SOCIAL MEDIA MARKETING METRICS

Likes:
The number of clicks on post Like buttons. Comments: The number of comments on your posts.

Shares:
The number of times a post has been shared. Also called retweets on Twitter or Repins on Pinterest.

Engagement Rate:
Measures the level of interaction happening between a social media profile and its audience.

Follower Growth Rate:
How quickly a profile is gaining new followers.

New Followers:
The number of new fans or followers earned over a given period of time.

Social Media Traffic:
Website or blog traffic driven by social media platforms.

Social Media Conversions:
Website or blog conversions from social media referral traffic.

Page Demographics:
A breakdown of demographic data based on a profile's followers, based on age, sex, location, occupation, etc.

Sentiment:
Measures how social media audiences feel about your brand.

EMAIL MARKETING METRICS

Newsletter Signups:
The number of people who have opted in to your mailing list.

Email Traffic:
Website or blog traffic referred through email marketing.

Email Subscribers:
The number of people who subscribe to your mailing list.

Email Engagement:
Measures engagement factors such as clicks and opens.

Email Opens:
The number of people who opened your email in their inbox.

Email Clicks
The number of people who clicked a link in an email.

Email Bounce Rate:
The number of emails that could not be delivered.

Email Forwards:
How many times an email was forwarded to another user.

PPC METRICS

Cost Per Click (CPC):
The cost of getting one click on an ad.

Click-Through Rate (CTR):
Measures how many people click an ad, based on how many times it appears.

Quality Score:
Used to determine an ad's relevancy based on keywords, search intent, and the quality of the destination page.

Impression Share:
The number of impressions ads receive, measured against the total number of impressions they were eligible to receive.

Total Conversion Value:
The total monetary value of all conversions over a period of time.

Return on Ad Spend (ROAS):
The amount of revenue generated measured against the amount spent.

Call Tracking:
The number of calls placed after click an ad.

Understanding Key Performance Indicators (KPIs)

It's important to prioritize metrics by what's most important. If each one is considered a priority, then in truth, none of them are a priority at all.

What is a Marketing KPI?

> *Key performance indicators are metrics that directly indicate progress toward a particular goal.*

In other words, they are the most important values for understanding marketing's influence on business success. While you may track multiple metrics, you should have a small number of highly focused KPIs.

How to Choose Your KPIs

Your business is unique, so your KPIs should be, too. While it's easy to look at what other companies consider important in your industry, it's best to measure what makes the most sense for your situation.

Plus, your KPIs may change over time. When you're starting out, you may have KPIs focused on building an audience first, before trying to monetize a product.

That's the CoSchedule story. The first KPI the company set when it started doing content marketing was building an audience. It was then determined the most effective way to do this would be to start a blog (based on observing the success of other similar companies).

So, the most important metric was getting pageviews. The more people who learned about CoSchedule, and found the company to be an authoritative vendor, the better.

Go back to your goals, and ask these questions:

- What is the most important metric we can monitor right now?
- What are the most important metrics we can monitor at each stage of the funnel?
- How might our KPIs change in the future as our business matures

Examples of KPIs for Beginning Marketers or New Companies

- Pageviews.
- Social media followers.
- Email list subscribers.
- Increased brand awareness.

Examples of KPIs for Advanced Marketers on Mature Teams

- Leads generated.
- Conversions.
- Revenue.

Of course, these are just suggestions. Ultimately, no one knows your business or specific situation better than you and your company. So, choose the KPIs that matter most to you right now.

You're A Master Of Metrics

This chapter is packed with lots of information. Hopefully, you've been able to simplify which metrics matter most (and certainly don't spend much time worrying about the rest). Now, it's time to move onto the next section.

CHAPTER 6

How To Determine Your Marketing Tactics

What Are Marketing Tactics?

Marketing tactics are the strategic actions that direct the promotion of a product or service to influence specific marketing goals.

Essentially, these are the high-level ideas. The content you create falls into your tactics.

Content types are not tactics. Nor are content types specific to a single marketing tactic.

For example, a marketing tactic is a case study. The content you create to execute that marketing tactic may include blog posts, white papers, and videos.

Use the following list to plan the strategic actions you'll use to direct your content creation efforts.

35 Marketing Tactics List

The purpose of this list is to help you choose the options you'll execute to make your goal a reality.

Which of these are most likely to help you influence that goal? Which of these can you realistically execute?

Read this chapter, and at the same time, use the Marketing Tactics List tab in your marketing strategy template spreadsheet to document your chosen tactics.

PAID

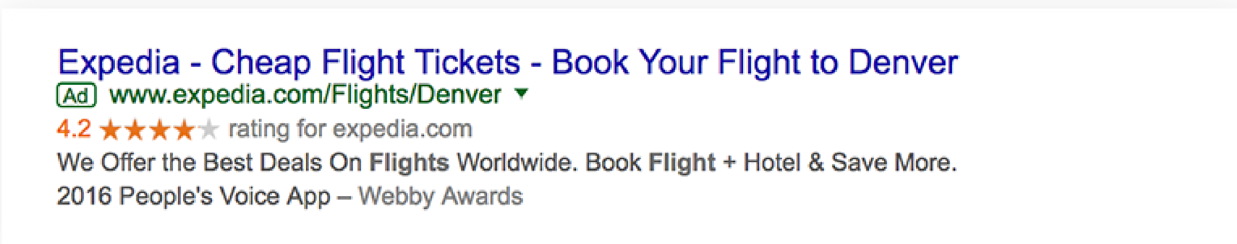
Buying brand or content placement in a publication, website, search engine, social network, etc.

Common content types:
Magazine ad
Billboard
Facebook ad

PAY PER CLICK (PPC)

A paid marketing tactic that displays digital advertising in media where you pay only when someone clicks on your content.

Common content types:
Google AdWords ad
Bing ad
Retargeting display ad



ADVERTORIAL/ NATIVE ADVERTISING

Typically a type of paid marketing tactic in which you buy placement of content that looks like the typical kind of piece that appears in a publica-tion or other medium.

Common content types:
Magazine ad
Sponsored blog post
Sponsored conference speech

SPONSORSHIP

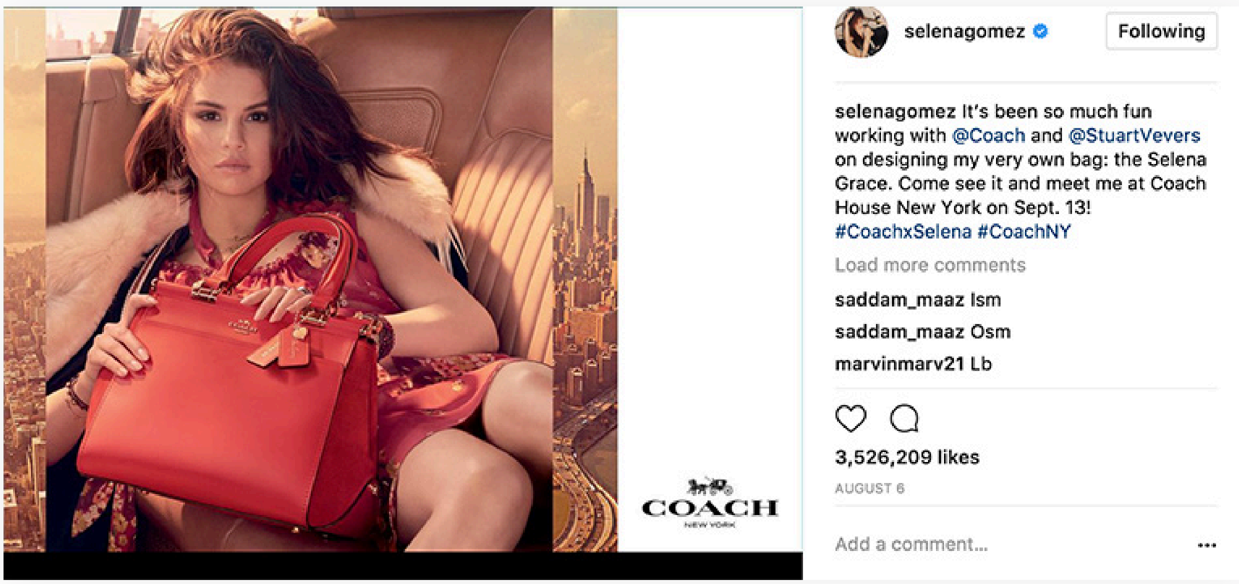
Also typically a type of paid marketing tactic in which you provide money in exchange for your brand representation in an event, etc.

Common content types:
Event
Podcast
Webinar

ENDORSEMENT + INFLUENCER

When someone of fame publically provides positive review of your brand, product, or service.

Common content types:
Ad
Email
Web page



TESTIMONIAL

A form of endorsement in which a customer provides positive review of your brand, product, or service, but need not have fame.

Common content types:
Home page
Signup page
Social media message

CASE STUDY

A positive customer story which typically details the problem they were facing, how your product or service solved the problem, and the results your solution produced for the customer.

Common content types:
White paper
Web page
Video

ADVOCACY

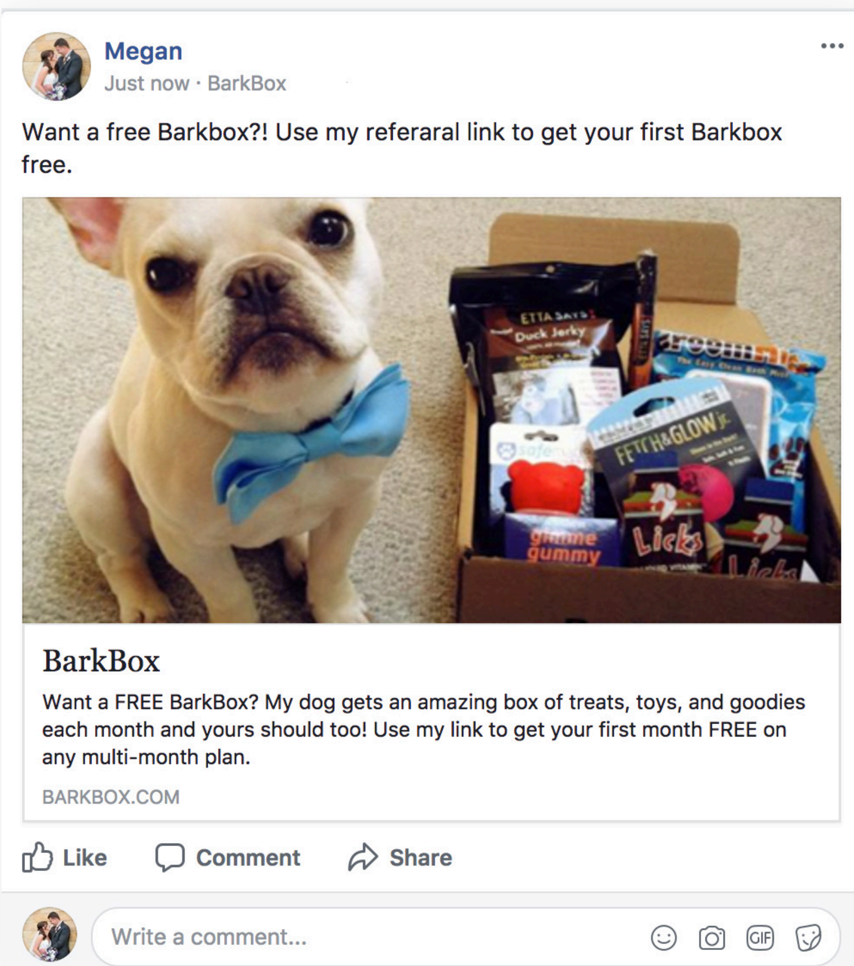
An earned marketing tactic in which a customer or fan shares positive sentiment for your brand, product, or service with others in your target audience.

Common content types:
Social media message
Blog post
Meetup

REFERRAL

A cross between earned and paid in which you incentivize your customers or fans to share positive sentiment for your brand, product, or service with others in your target audience.

Common content types:
Social media message
Blog post
Website badge



AFFILIATE

A cross between earned and paid similar to endorsement in which you incentivize an influencer to share positive sentiment for your brand, product, or service with your target audience.

Common content types:
Blog post
Webinar
Email

CROWDSOURCE

A method of gathering ideas from your customers + target audience to create new content that attracts more prospects like your best fans.

Common content types:
Blog post
Podcast
Webinar

ENGAGEMENT

The strategic connection to customers + target audience through content types that foster and build relationships.

Common content types:
Social media message
Blog post comment
Survey

EVENT

A planned occasion in which you either physically or digitally meet your customers or target audience at a specific time.

Common content types:
Conference
Webinar
Meetup

LIVE STREAMING

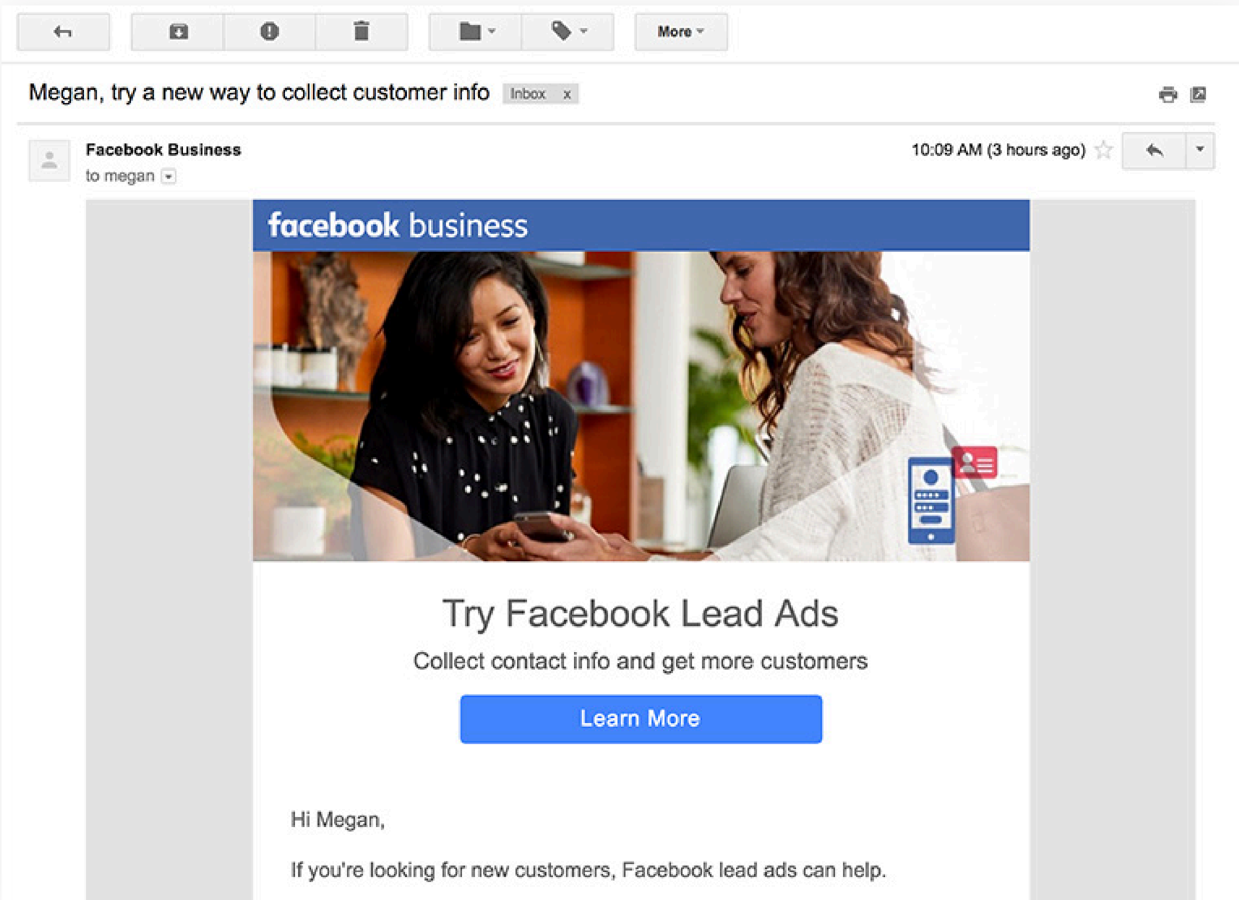
An event marketing tactic in which you record and share your meeting in real-time as it unfolds.

Common content types:
Conference
Facebook Live
Podcast

PERSONALIZATION

Including the actual name of the person you're communicating with in the content you're sharing.

Common content types:
Email subject line
Website
Popup



MARKETING AUTOMATION

Strategically (and automatically) sending content to customers + target audience based on their activity and interests.

Common content types:
Email
Popup
Ad

CO-BRANDING + PARTNERSHIP

When your brand collaborates with another business to create content that attracts a mutually beneficial target audience.

Common content types:
Webinar
Podcast
Ad

CONTENT CURATION

When you gather content from sources you don't own (and mainly content you haven't created) to share with your customers + target audience.

Common content types:
Content hub
Social media message
Blog post

CONTENT SYNDICATION

When you publish content first on your owned channel, then provide rights for other publications to republish your content.

Common content types:
Article
Video
E-book

EARNED

When another brand, influencer, publication, etc. mentions or covers your brand, product, or service in content they create and publish.

Common content types:
Article
Social media message
Podcast

GAMIFICATION

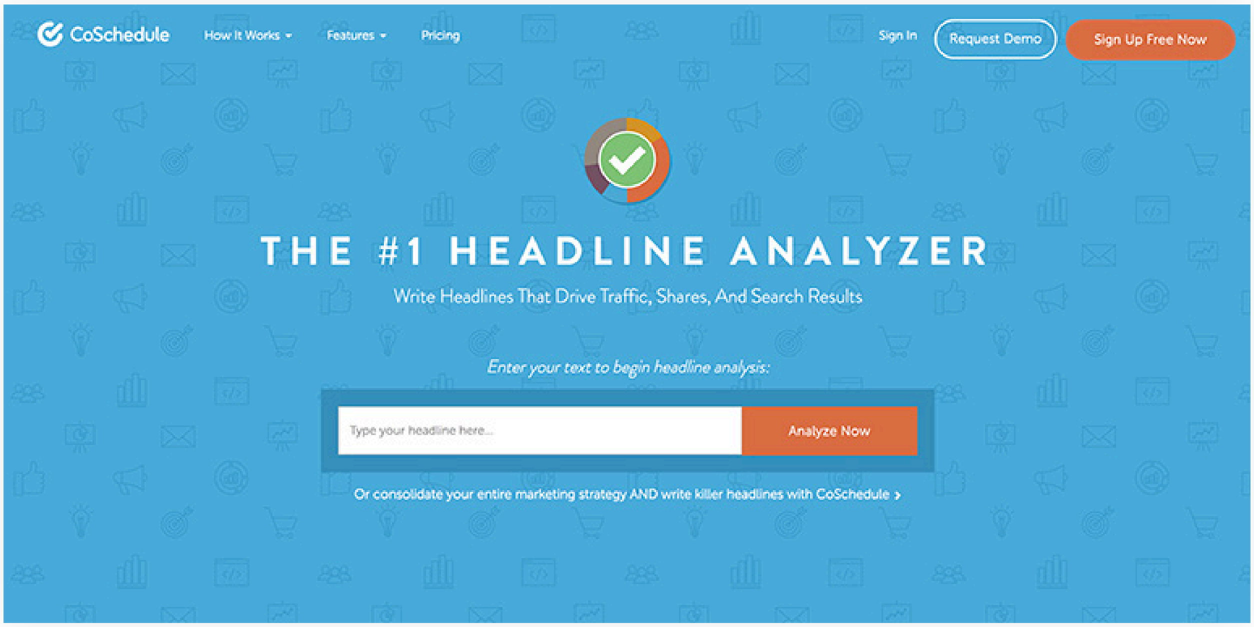
Applying game playing techniques into content to engage your customers + target audience.

Common content types:
App
Quiz
Ad

TOOL

Interactive content that helps your customers or target audience solve a problem.

Common content types:
Analyzer/optimizer
Calculator
Tester



RESEARCH

Can be curated or original, presenting findings or answers to specific questions your customers or target audience often ask.

Common content types:
Survey
Report
Blog post

REPURPOSE

When you take existing content and turn it into a new piece to maximize the work you've done with minimal effort.

Common content types:
Blog posts into e-book
Webinar into video
Social media messages into blog post

REPUBLISH

When you publish the same piece of content in the same medium, often after optimizing it to increase its results.

Common content types:
Social media message
Blog post
Course

SEARCH ENGINE OPTIMIZATION (SEO)

Developing content and enhancing your web properties to help those searching for specific information to naturally find your content.

Common content types:
Web page
Blog post
Guide

CONTEST

An engagement marketing tactic in which you give your customers or target audience the chance to win something in exchange for their participation.

Common content types:
Poll
Social media message
Landing page

MEDIA OUTREACH

An earned marketing tactic in which you strategically provide information to a media outlet to encourage someone to create content that positively covers of your brand, product, or service.

Common content types:
News release
Pitch packet/kit
Email

GUESTING

When you provide content, information, or appearances to other sources to reach your target audience.

Common content types:
Blog post
Webinar
Podcast

CONVERSION RATE OPTIMIZATION (CRO)

Strategic enhancements to increase the number of people who take a desired action.

Common content types:
Ad
Landing page
Home page

BLOGGING

A content hub that distributes primarily written content but also often includes audio + visual + video.

Common content types:
Blog post
Infographic
Video

SOCIAL MEDIA

Online communities where users share information often via micro-messaging, images, and links.

Common content types:
Forum
Wiki
Q&A

EMAIL

An electronic letter you send to your customers' or target audience's inboxes with the intent of influencing a specific action.

Common content types:
Newsletter
Blog post email
Behavior-driven email

MARKETING A.I.

Behavior-driven recommendation and recognition technology that delivers specific content to individuals.

Common content types:
Product recommendation
Content recommendation
Display ad

GUERRILLA

Unconventional actions + content that aim to attract the most attention possible.

Common content types:
Dirty sidewalks cleaned to show only your logo
Public bus wrap
Beer coaster postcard

Choose the marketing tactics that are most likely to influence your goal. Open the Marketing Tactics tab in your marketing strategy template spreadsheet, and fill in column A.

You may also opt to add your tactics into the PowerPoint deck also available in the marketing strategy template kit.

Congrats! You've chosen your marketing tactics.

Continue to Chapter 7 to create a marketing budget plan. Sounds super fun, I know. ;)

CHAPTER 7

How To Create A Marketing Budget Plan

What Is Your Marketing Budget?

Your marketing budget is the planned amount of money you'll spend to make your marketing goal a reality.

4 Ways To Calculate Your Marketing Budget

1. Percent Of Revenue

This method of calculating your marketing budget is anecdotal at best. If you opt for this route, you essentially pick a percentage of revenue to spend on marketing, then choose your marketing projects and tools based on what fits within the budget.

Nevertheless, if you'd like to try this method, here are some recommendations:

- New businesses 1-5 years old should allocate 12-20% of revenue toward marketing.
- Businesses that are older than 5 years should allocate 6-12% of revenue.
- B2B businesses should allocate 7-8% of revenue.
- B2C businesses should allocate 9% of revenue.

Basically, the marketing budget formula for percent of revenue looks like this:

Budget = total revenue × % allocated toward marketing

The problem is that this method doesn't take into account your marketing strategy—goals, tactics, projects, etc.—whatsoever.

2. Top-Down

Your boss tells you how much money you have to spend. Also... not a very data-driven method based on the goals you'd like to influence and the projects you're planning to take on to make those goals a reality.

3. Competition-Matching

This method is keeping up with the Joneses, and does not foster a blue ocean marketing strategy. With this method, your budget is determined based on the tactics your competition is executing.

For example, your competitor launches a blog. Therefore, you create a plan based on how much it will cost you to launch a blog.

This method goes against much of the work you've already completed throughout this marketing strategy guide.

4. Goal-Driven

This method requires you to set goals first, then plan your budget to make the goals a reality.

Hmmm.... probably sounds familiar. ;)

This is the best method for setting a realistic amount that will help you reach your goals.

The goals-driven formula looks something like this:

Monthly marketing budget = (marketing goal acquisition cost × marketing marketing goal #) + marketing operational costs

How To Set Your Goal-Driven Marketing Budget

Determine Marketing Goal Acquisition Cost

How much money do you spend to get one goal conversion?

Here are a couple ways to calculate your goal acquisition cost (choose one method):

Average Piece Method:
For example, you may opt for understanding how much it costs you to create an average piece of content and divide it by the results it produces.

Marketing goal acquisition cost = cost to create an average piece of content / # of goal conversions

For example, let's assume the CoSchedule marketing team spends the following to create an average piece of content:

- 4 hours writing content at $25 per hour
- 1 hour designing content at $25 per hour
- 1 hour promoting content on social media at $25 per hour
- 30 minutes promoting content via email at $25 per hour
- 30 minutes writing ads promoting the content at $25 per hour
- $100 on paid ads to promote the piece

We use the Google Analytics Custom Report you set up in Chapter 2 of this marketing strategy guide to determine that average piece of content influenced 20 goal conversions.

Following the marketing goal acquisition cost formula, CoSchedule's example goal acquisition cost is $13.75:

((4 × $25) + (1 × $25) + (1 × $25) + (.5 × $25) + (.5 × $25) + $100) / 20 = $13.75

In other words, it costs CoSchedule $13.75 for one goal conversion in this example.

You can obviously average out the cost of several pieces divided by their goal conversions to calculate an even more precise goal acquisition cost.

Over Time Method:
If the average piece method feels a bit daunting, this is the simpler goal conversion cost calculation method:

Marketing goal acquisition cost = cost of marketing / # of goal conversions

Yeah, that looks like the exact same thing as the average piece method, so let's take a look at another example of how this method actually differs.

Last month, let's assume CoSchedule spent the following on marketing:

- $4,400 on salary
- $4,400 on salary
- $4,400 on salary
- $4,400 on salary
- $10,000 on paid ads

In the same month, CoSchedule gained 1,400 goal conversions.

In this example, CoSchedule's goal acquisition cost is $11.60.

$4,400 + $4,400 + $4,400 + $4,400 + $10,000 / 2,000 = $11.60

You can expand your time frame beyond a month, too, to get an even more precise goal acquisition cost calculation.

Find Your Monthly Marketing Operational Costs

This is the amount of money you spend to "keep the marketing lights on" each month. Add together all of your costs for:

- Marketing tools
- Hosting services
- Domain names
- SSL security certificates
- Team education (course, books, etc.)
- Memberships for professional organizations
- Paid WordPress themes
- Ad expenses
- Salaries
- Etc.

For example, let's say CoSchedule has the following monthly marketing operational costs:

- $6 for SSL certificate from Network Solutions
- $10 for Name.com domain name
- $15 for Bluehost website hosting
- $60 for CoSchedule marketing calendar
- $99 for Mention social listening
- $399 for AHREFs keyword + SEO
- $50 for employee learning allowance x 4

- $35 for American Marketing Association membership × 4
- $4,400 on salary × 3
- $10,000 on paid ads

In this example, CoSchedule's monthly marketing operational costs are $28,529.

$6 + $10 + $15 + $60 + $99 + $399 + ($50 × 4) + ($35 × 4) + ($4,400 × 4) + $10,000 = $28,529

We can realistically expect to spend $28,529 every month just to keep CoSchedule's marketing operational.

Calculate Your Monthly Goal-Driven Marketing Budge

You set and amortized monthly marketing goals in Chapter 1 of this marketing strategy guide.

The **Marketing Budget** tab in your marketing strategy template automatically pulls the monthly goals from your **Goal Tracking** tab you set in Chapter 1.

Simply enter your **Marketing Goal Acquisition** Cost in cell C6 and your **Marketing Operations Costs** figure in C7 in the Marketing Budget tab.

Marketing Budget

Assumptions	
Marketing Goal Acquisition Cost	$13.75
Marketing Operational Costs	$28,529.00

	January	February	March	April	May	June	July	August	September	October	November	December	Annual Budget
Final Goal	638	750	938	1200	1538	1950	2438	3000	3638	4350	5138	6000	
Monthly Budget	$37,294.63	$38,841.50	$41,419.63	$45,029.00	$49,669.63	$55,341.50	$62,044.63	$69,779.00	$78,544.63	$88,341.50	$99,169.63	$111,029.00	$776,504.25
Stretch Goal	644	778	1000	1311	1711	2200	2778	3444	4200	5044	5978	7000	
Monthly Budget	$37,390.11	$39,223.44	$42,279.00	$46,556.78	$52,056.78	$58,779.00	$66,723.44	$75,890.11	$86,279.00	$97,890.11	$110,723.44	$124,779.00	$838,570.22

From here, the spreadsheet will automatically calculate your goal-driven monthly budgets for the entire year with this formula:

Monthly marketing budget = (marketing goal acquisition cost × marketing marketing goal #) + marketing operational costs

A Goal-Driven Marketing Budget Example

Let's finish CoSchedule's marketing budget example you've learned throughout this chapter so far.

Goal Acquisition Cost:
The amount of money CoSchedule spends to get one goal conversion.

((4 hours × $25 per hour) + (1 hour × $25 per hour) + (1 hour × $25 per hour) + (.5 hours × $25 per hour) + (.5 hours × $25 per hour) + $100 for paid ads) / 20 goal conversions = $13.75 marketing goal acquisition cost

Marketing Operational Costs:
The amount of money CoSchedule spends each month to generate goal conversions.

$6 for SSL certificate + $10 for domain name + $15 for hosting + $60 for CoSchedule + $99 for Mention + $399 for AHREFs + ($50 learning allowance × 4 employees) + ($35 association membership × 4 employees) + ($4,400 salary × 4 employees) + $10,000 for paid ads = $28,529 marketing operational costs

Marketing Goal:
The number of goal conversions CoSchedule wants every month.

(6,000 final goal - 600 start goal) × (1 month number / 12 months to complete goal) ^ 2 assumption + 600 start goal = 638 goal conversion goal for January

Goal-Driven Marketing Budget:
The amount of money CoSchedule needs to spend per month to reach our marketing goals.

($13.75 marketing goal acquisition cost × 638 goal conversion goal for January) + $28,529 marketing operational costs = $37,294.63 marketing budget for January

^^^ This example calculated the marketing budget for January. Since the example carries out for an entire year, we'd simply run the same formula for each month within our time-bound goal. In this case, it would be 12 times (January, February, March, April, May, June, July, August, September, October, November, and December).

The Marketing Budget tab in your free marketing strategy template spreadsheet automatically calculates this for you for each month and the year.

So now you can follow the same formula to calculate your marketing budget for every month. If you have 12 months to reach your goal, you can simply add together all of those months to know your annual marketing budget.

Congrats! You've set your marketing budget! Now that you know your monthly budgets, it's time to break down your highest priority projects into realistic timelines your team will execute.

CHAPTER 8

How To Create A Brand Positioning Strategy That Will Appeal To The Right People

You've probably heard that a brand is more than a logo. More than a product. More than a service.

And each is true.

It's an umbrella that spans from social media branding to user personas to voice and tone to everything in between.

And in some ways, it's even more.

Because it's all of these things packaged up and presented—then unpacked and cracked open so the world can see the gooey insides.

In simplest terms, a brand has three components:

Feeling: gut-level reaction.
Promise: the vow a brand makes to its audience.
Relationship: the quality of ongoing interactions between a brand and its audience.

In order to build a great brand, you need to bring them all together in a simple and energizing way to craft a brand strategy that appeals to the right people.

A brand strategy is a master plan for connecting your unique value with the right audience every time you cross paths.

This one's called the story-source brand strategy.

It's the perfect place to start or pivot that will:

1. **Connect your brand to the right people.** By defining your audience persona and outlining their challenges, you'll learn exactly how to craft messaging that resonates with them.
2. **Unify your brand across every channel.** By knowing how you can add unique value to your audience, you can continually make a giant, compelling, and *true* brand promise. This is the secret sauce to nurturing an enviable (and profitable) relationship with your audience.
3. **Infuse your marketing with purpose and excitement.** Marketing is about driving profitable customer action. But the best way to do this isn't by soullessly pushing products and services at anyone with a pulse. It's about tapping into the powerful reason why you truly love helping your audience.

Now, it's time to cut the B.S. out of brand strategy.

Your Brand As A Gut-Level Reaction

In his illuminating book The Brand Gap, Marty Neumeier says: "A brand is simply a gut feeling and a promise."

Your brand equals the gut-feeling your audience has when your company's name comes up. It'll be different for everyone. But here's a quick test.

Grab three sticky notes and lay them side-by-side.

Now, write these three brand names, one per note:

- Fruit of the Loom
- Calvin Klein
- Victoria's Secret

Even though each brand sells similar products, they evoke different gut-level reactions. This is the first secret of what a brand is and how it works.

The Sticky Note Brand Test

Grab three more sticky notes. Write your brand's name on one and your two main competitors' on the others; one name per note.

Take them to someone who knows something about each brand. (And ideally, is someone outside of your company.)

Lay the sticky notes in front of them one at a time. Then ask for the first word or feeling that pops into their mind upon seeing the brand name.

Start with your competition; then move to yours.

Compare the words they gave you. Then ask: "Can you explain why?"

If possible, do this test a few more times and compare results.

As you do, ask yourself three questions:

1. What patterns emerge?
2. Am I happy with the honest, gut-level reactions to my brand?
3. What can we do to make them better?

The Brand Promise

Second, a brand is the promise an organization makes to its audience.

There's a popular marketing saying that goes: "A brand is a promise made. A great brand is a promise kept."

(It appears that Bea Perez of Coca-Cola originally turned this phrase.)

Case-in-point: Google's famous mission "to organize the world's information and make it universally accessible and useful."

Is Google making good on this mission? This promise?

When it comes to news, more people trust Google than traditional media outlets. When it comes to organizations, Google Drive sports more than one million paid users.

That's a lot of people trusting Google to be honest with the information they present and the data they store.

Sure, some techy folks don't trust Google with their data. But the numbers are an avalanche of trust in the brand.

Consumers and businesses believe Google's promise. And why? Because they're making good on it.

How To Define Your Brand Positioning

Brand positioning happens whether or not you intentionally incorporate it into your marketing strategy. You can proactively influence this perception by planning your brand positioning before you publish content (therefore, before you define your brand voice).

Consider these key factors as you define your brand positioning:

1. Relevancy
2. Uniqueness
3. Credibility

The following exercises will help you write your brand positioning statement like this example template:

{Insert target audience} trust {insert your brand} as the {insert unique product or service category} that {insert primary benefit} because {insert your brand} is the best way to {insert credibility statement}.

Relevancy

How can you make your brand relevant to your prospects?

You've already done much of the leg work to understand the emotional reasons why your customers choose your product or service. In your customer survey, explore the answers to the following questions:

- What is the primary reason you use {insert your product or service}?
- Why did you choose {insert your product or service} over other solutions?
- What is the most significant difference {insert your product or service} is making for you today?

- What is the single greatest benefit {insert your product or service} provides? / What is the primary benefit you have received from {insert your product or service}?
- What prompted you to look for a solution like {insert your product or service}?

Copy the answers from those questions and paste them into a word cloud generator.

From here, analyze the most commonly-used words that describe your product or service and its benefits (or the emotional reasons why your customers buy from you).

For example, this is what it looks like for CoSchedule:

Use this visualization to determine your **primary benefit**:

What is the #1 reason your customers hire your product or service?

In this example, CoSchedule's primary benefit is ease + organize.

Enter in your **Relevancy** statement in cell B3 in the **Brand Positioning + Voice** tab in your marketing strategy template.

Uniqueness

How will your brand stand out from your competition?

In your customer survey, you asked the question:

If you didn't use {insert your product or service}, what would you most likely use instead? / What would you likely use as an alternative if {insert your product or service}were no longer available?

The answers provided are the names of your top competition. At this point, review their websites for their brand positioning.

Review for qualities like:

- Taglines
- Headlines
- Keywords
- Common verbiage

Now brainstorm how your brand positioning will be uniquely different:

- How would you define your product or service to someone outside of your industry?
- How would you define your product or service to someone in your niche who's never heard of it but who is familiar with industry lingo?
- How do you envision your product or service is different than your competition?

You may also opt to look into your customer survey data for answers to this question:

How would you (briefly) describe {insert your product or service} to someone else?

Then enter that information in a word cloud generator to understand the most commonly used words.

^^^ This practice will also help keep your product or service category relevant in your brand positioning statement.

For example, this is what it looks like for CoSchedule:

Use this process to determine **your unique product or service category**:

What words describe your product or service?

For example, CoSchedule's unique service category is marketing management platform.

Enter your **Uniqueness** statement in cell B4 in the **Brand Positioning + Voice** tab in your marketing strategy template.

Credibility

Why should your target audience trust your brand? Why should they believe your brand will deliver the benefit better than any competitor?

Again, look to the answers from these questions in your customer survey:

- What is the primary reason you use {insert your product or service}?
- Why did you choose {insert your product or service} over other solutions?
- What is the most significant difference {insert your product or service} is making for you today?
- What is the single greatest benefit {insert your product or service} provides? / What is the primary benefit you have received from {insert your product or service}?
- What prompted you to look for a solution like {insert your product or service}?
- (^^^ Yep, those are the same questions you reviewed for your primary benefit.)

This time around, you're looking for words that describe why your customers trust you. The framework to follow is this:

- {Insert your brand} is the only {insert credibility statement}.
- {Insert your brand} is the best {insert credibility statement}.

Use this visualization to determine **your credibility statemen**t:

What makes you the most credible brand in your unique product or service category?

For example, CoSchedule's credibility statement is see + one + place.

Enter your **Credibility** statement into cell B5 in the **Brand Positioning + Voice** tab in your marketing strategy template.

Making Good On Your Brand Promise

So what is your brand's promise? What is your reason for existing?

Write Your Brand Positioning Statement

Let's bring all three exercises together to help you write your brand positioning statement. Here's your template again:

{Insert target audience} trust {insert your brand} as the {insert unique product or service category} that {insert primary benefit} because {insert your brand} is the best way to {insert credibility statement}.

For example, here are the results of the three exercises for CoSchedule:

1. **Relevancy:** Ease + organize.
2. **Uniqueness:** Marketing management platform.
3. **Credibility:** See + one + place.

Therefore, the CoSchedule brand positioning statement example using that template looks something like this:

Professional marketing managers trust CoSchedule as the marketing management platform that gets them organized easily because CoSchedule is the best way to see every marketing project in one place.

Enter your **brand positioning statement** in cell B7 in the **Brand Positioning + Voice** tab in your marketing strategy template.

Can you finish that statement? Even more, do you *really* believe that you're fulfilling this promise?

(You'll also find the corresponding section in the story-source brand strategy worksheet.)

The degree to which you fail to fulfill your promise is called the "trust gap."

Author Scott Stratten explains this well in his book Unmarketing.

He says the trust gap is "the amount of trust you have to earn before your potential customer will consider buying from you."

This goes further, though.

Because not only do you have to earn enough trust to secure a purchase—*you have to keep it along the way.*

Said Bill Kobel: "The real fallout of breaking your brand promise is loss of trust. Once you lose trust, you have to work twice as hard to earn it back—if you can."

How does a brand win trust?

Enter the brand-audience relationship.

The Relationship Between A Brand And Its Audience

Here's the deal. Marketing is all about driving profitable customer action. And brand strategy shares this goal—especially when it comes to your relational health.

At this point, you might think I'm going to provide you the number of a therapist or start asking you questions about your childhood.

But I'll leave the sappy stuff for another day…

Instead, let's talk about concrete ways go do a health check on your brand-audience relationship.

This relationship can be measured by the quality of ongoing interactions. These touch points can be anything from your content to ads to physical environment to customer support and more.

In short, when your audience interacts with any facet of your brand, the relationship is either helped or harmed.

How To Measure Your Brand Sentiment Score

Leah Schothorst, a Social Media Strategist at CoSchedule, how the company measures the health of our brand-audience relationship.

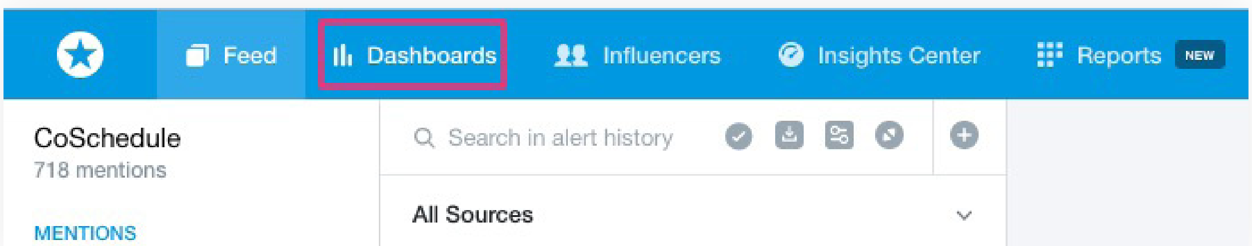
She explained three metrics brands should pay close attention to. They are audience growth, engagement rates, and sentiment.

While each are important, I think the clearest indicator of relational health is sentiment.

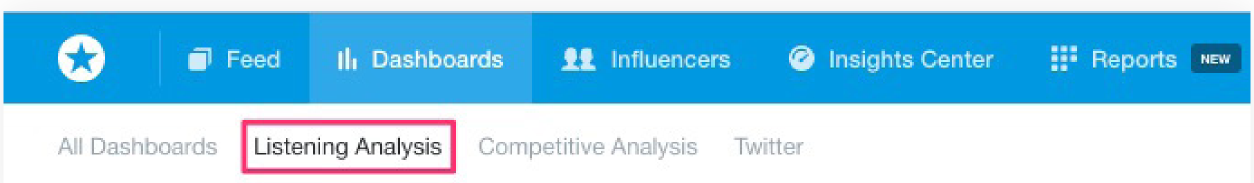
Sentiment measures the weight of positive, neutral, and negative mentions of your brand. PR folks use tools like Mention and Cision to peer into the sentiment pensieve.

CoSchedule uses Mention. So, here is how to run a sentiment analysis with it.

To begin, login to your Mention account and select "**Dashboard**."



Next, select "**Listening Analysis**."



Now you've arrived at your "**Listening Dashboard**," where you can track mentions by channel, the times people talk about you the most, and of course...

How your audience really feels about you!

For example, here's what our sentiment score looks like over a recent seven-day period:

Each bar represents the total mentions for a given day.

The green segments show positive mentions. The gray show neutral ones. And the red are the ones you don't enjoy seeing—negative mentions.

I ran this report on the afternoon of August 7, 2017. Up to that point, CoSchedule had 97 trackable mentions.

Of which, 21.6% were positive, 77.3% were neutral, and about 1% were negative.

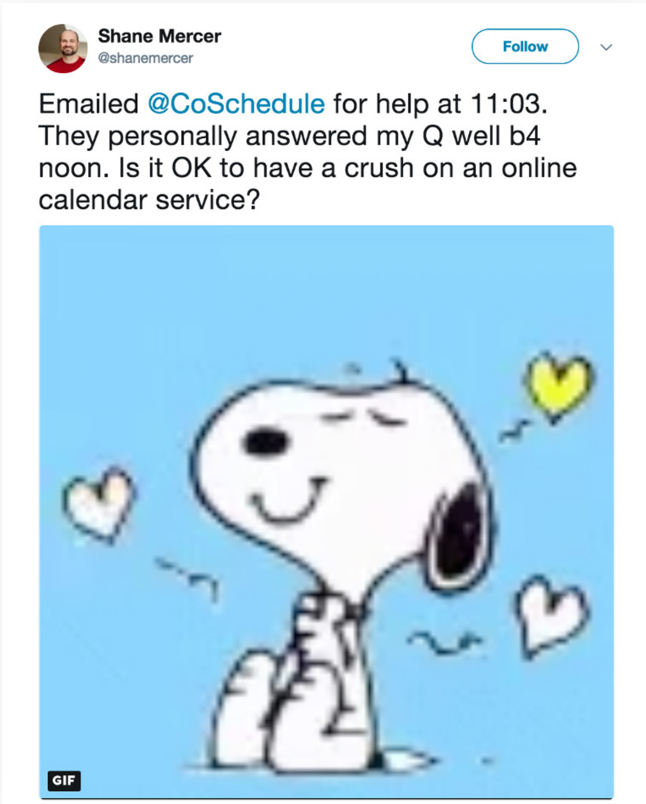
Pro Tip:
Neutral mentions are often shares or similar engagements. However, they're worth combing through with a human eye. This way you can find and mark positive mentions the tool may have misinterpreted. Additionally, always look closely at your negative marks. For instance, if someone tweeted that, "CoSchedule is sick!" That may be counted as a negative mention. When in reality, it's a good thing.

Overall, a healthy audience is one that's growing, engaged, and speaking positively about your brand.

From a brand strategy perspective, one of the best best ways to nurture this kind of relationship is by simply fulfilling the brand promise you make.

Beyond having a great product, your customer service will go leagues in building a stellar brand.

At CoSchedule, the Customer Success Team is absolutely killer in this department. From onboarding to support, they're nearly flawless at executing our brand promise.



Brand Strategy: Where Most Go Wrong

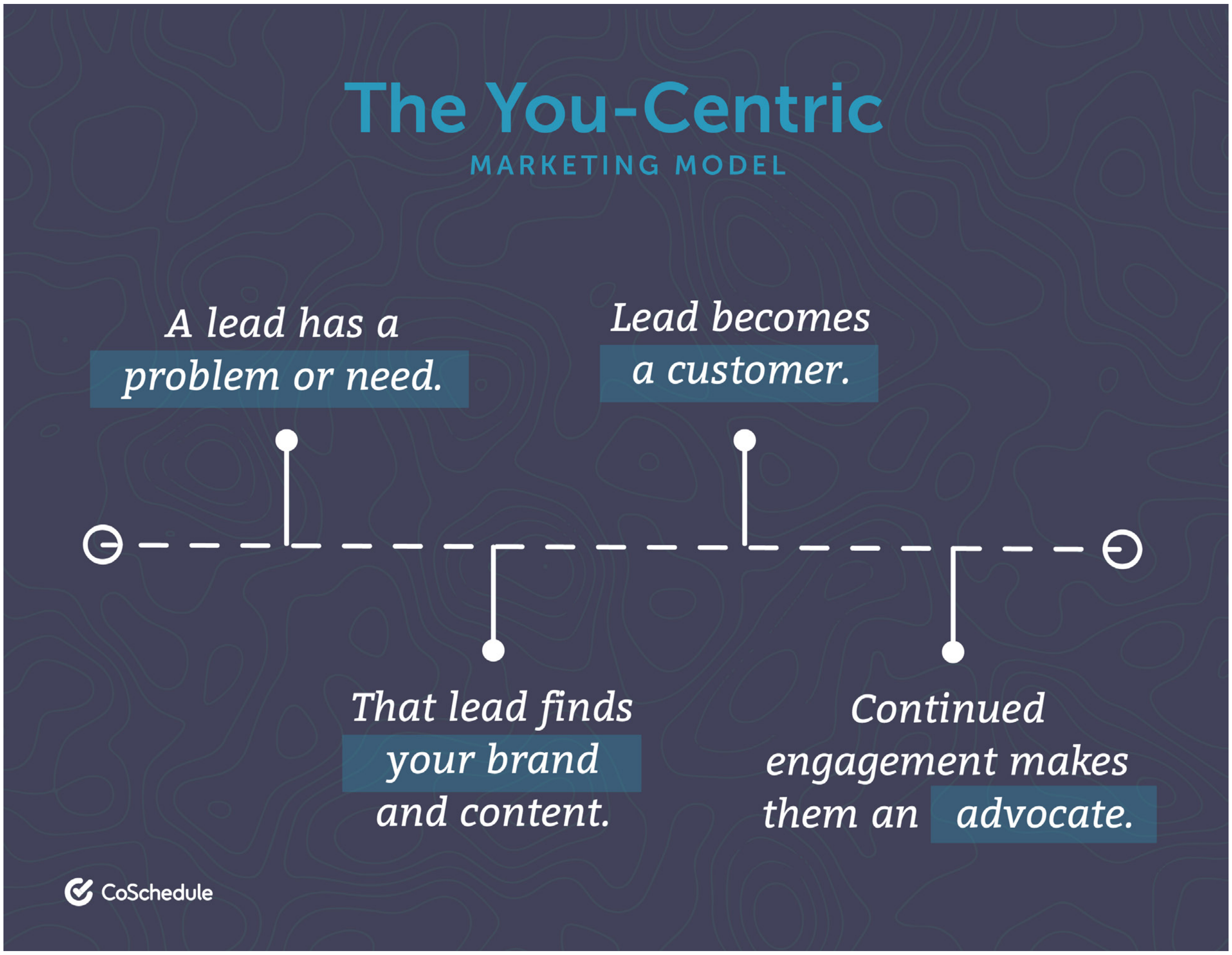
The old way of branding is "Me-Centric."

It's about talking "at" people with the primary topic being... Yourself.

You know, straight up self-promotion masquerading as branding.

The question brands need to ask themselves is, "How does our message reinforce and fulfill the value we've promised to deliver?"

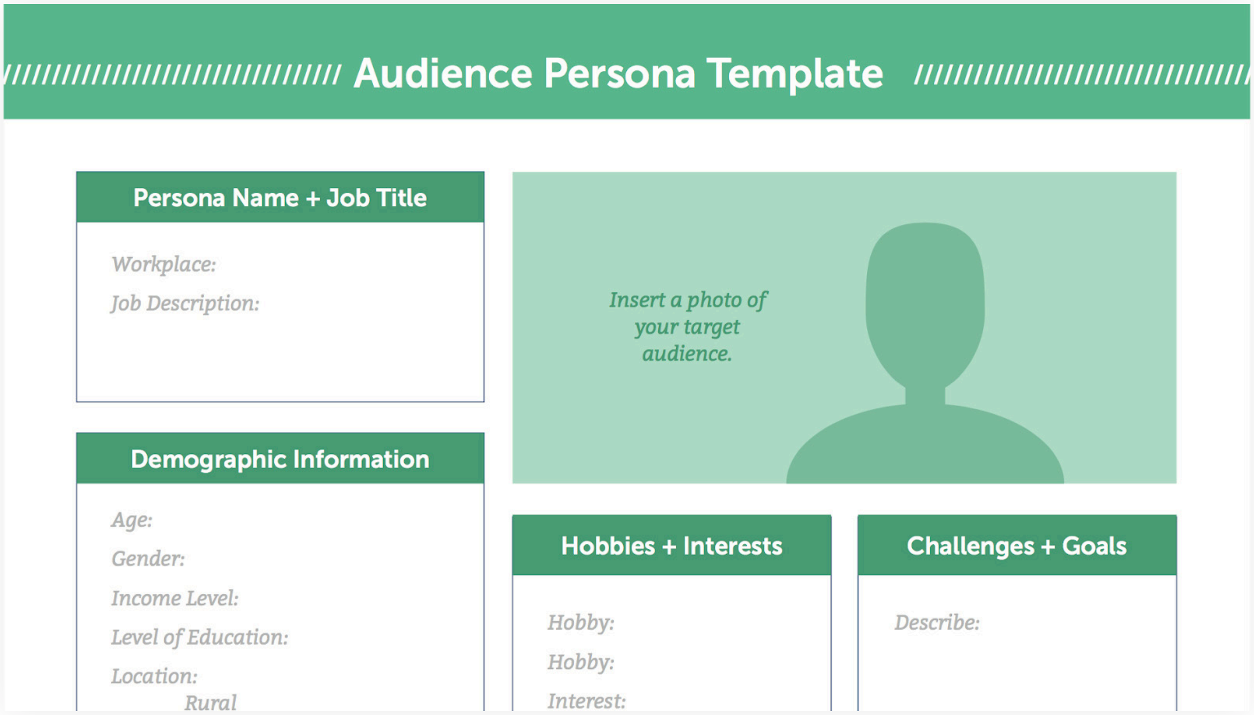
To do this, brands must adopt a "You-Centric" model.



Jay Baer explained this perfectly in his book *Youtility*.

He wrote: "What if instead of trying to be amazing you just focused on being useful? What if you decided to inform, rather than promote?"

To hyper-focus on the right people, open up the **audience persona template** included in your free kit.



As you answer the questions in the workshop, you will define exactly who your target audience is and what they're interested in. You'll also work through your brand positioning statements.

Most importantly, you will outline their primary challenges and goals.

These serve as the fuel to your brand's fire.

Why? Because, just as Jay Baer said, it's about being useful and informative.

Your persona(s) is where you define exactly how you can do both. Because that's the crux of the story-source brand strategy.

It rests on five tenets:

1. Know your audience.
2. Know your value.
3. Make a true promise.
4. Foster a healthy relationship.
5. Never stop.

Every tenet leads to the end of relationship. Because put another way, your brand is the quality of the relationship with your audience.

Obviously, you're not taking your customers to prom (at least I hope not). So in this context relationship means the stickiness of trust coupled with compelling reasons to return.

It's as dear Uncle Aristotle observed: "Man is a social animal…"

That's how we're psychologically wired. Don't ignore it as irrelevant or non-professional. Embrace it as your new touchstone for approaching your audience in a way that works.

Sure, you'll talk about yourself—you have to. If you don't, there's no relationship. But always do so from the perspective of how you're responding to their needs.

How are they the source of your story? The hero of your narrative?

The story-source strategy creates a compelling, coherent, and flexible message. It's simple at its core—yet can be layered in complex ways without sacrificing clarity.

Brand Strategy From The Storytelling Masters

Coca-Cola is one of the world's most valuable and recognizable brands.

Coke ranks third on Interbrand's top 100 global brands list—trailing tech luminaries Apple and Google.

That's pretty phenomenal company to keep.

Their brand strategy, simply called "One Brand," unifies the beverage giant's global brand. In fact, they've distilled their brand story into just three words: "Taste the feeling."

This strategy marries closely with their content marketing approach, called "Content 2020."

One of the keys to their carbonated kingdom is called dynamic storytelling.

Here's their pretty technical definition: *Dynamic storytelling is the development of incremental elements of a brand idea that get dispersed systematically across multiple channels of conversation for the purpose of creating a unified and coordinated brand experience.*

Allow me to translate.

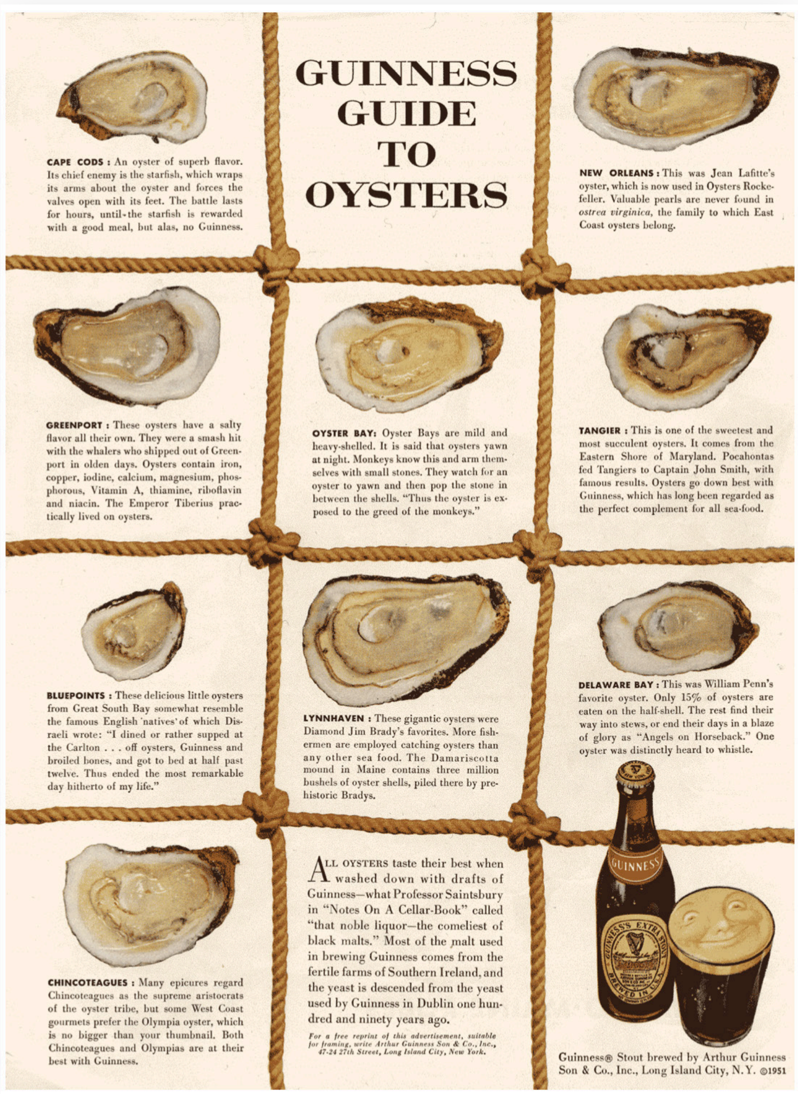
Dynamic storytelling means sharing your story-source everywhere, at all times, and via every appropriate medium.

So your "story" isn't simply your company's history. It's not just about your culture. And it's more than customer testimonials.

It's the narrative of how you help your audience overcome their problems to get what they most deeply desire.

The Strategy At Work In Advertising

Let's dissect a great example from the classic "Guinness Guide to Oysters" ad created by David Ogilvy in 1951.



Source: Ogilvy On Advertising page 59

This is one of my all-time favorite ads. Notice that it does all of the things a story-source brand strategy should do.

It talks with their audience, educating them on how to enjoy a delightful meal. In fact, only four of the ten sections of the copy even reference Guinness.

Instead, they create mistyque. And sections such as "Delaware Bay" make the implicit promise that, "If you do this, you'll be like William Penn."

Not only are they promises of an enjoyable meal. They're promises of being a culinary insider. An impressive and classy connoisseur.

There's magic here that deepens the relationship between customer and brand.

They speak directly into the hearts (and bellies) of their target audience. This makes them the heroes of the story.

Go Forth And Brand!

Gary the cow certainly wishes he would have had our brand strategy to work with. Thankfully, we don't have to go through the pain and confusion branding can evoke.

Don't forget to download your free kit that includes the **story-source brand strategy worksheet**, **audience persona template**, and **social media messages template**.

This kit is a powerful branding trifecta. So work the process, ask the tough questions, and answer them honestly.

As you do, remember the five tenets of this brand strategy:

Know your audience.
Know your value.
Make a true promise.
Foster a healthy relationship.
Never stop.
And you're well on your way to successful branding that appeals to the right people.

Happy marketing!

CHAPTER 9

How to Define Your Unique Brand Voice

Branding builds businesses that endure. The most beloved and longest-lasting companies tend to be those that understand this. They invest in building a consistent presence and personality that's immediately recognizable across their entire marketing strategy.

When people think about brands, they often think about their visual identity. However, there's another element that often gets overlooked: **voice and tone**.

What Is Brand Voice?

Brand voice refers to the personality and emotion infused into a company's communications. It encompasses everything from the words and language you use, to the personality and image your marketing assets aim to invoke. It plays an important role in making sure your message cuts through the noise and makes a lasting impression on potential customers.

Why Is Having A Strong Brand Voice Important?

The most enduring companies have a strong personality and clear sense of purpose. Their message is delivered consistently everywhere they have a presence with an established brand voice.

Developing brand recognition with consumers requires consistency and repetition. If your personality or messaging appear to change frequently, it's harder for audiences to know exactly what you're all about. As a result, your efforts are likely to fall flat, and lose out to a better-branded option (whether or not they can match your product quality).

What Exactly Is The Difference Between Voice And Tone?

In addition to your voice, it's also important to understand tone.

- **Voice:** This describes your company's personality. It's consistent and unchanging.
- **Tone:** The emotional inflection applied to your voice. It adjusts to what's suitable for a particular piece or message.

While your voice remains consistent, tone may change according to the context of your messaging. For example, a social media post about a fun sale would have a more light-hearted tone than one breaking news about a company crisis.

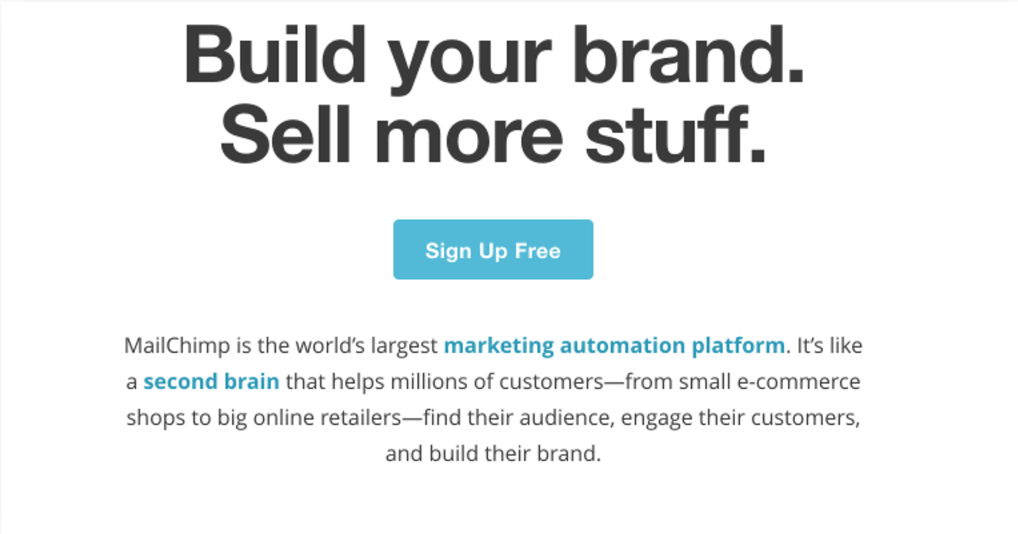
Taking A Look At 3 Examples Of Exceptional Brand Voices

If this still sounds abstract and a little tough to understand, that's okay. Sometimes, it's easier to see real-world examples to make a concept click. So, here are five brands who have nailed their voice.

MailChimp: Warm. Welcoming. Helpful.

Email marketing can be complicated, but MailChimp's voice reinforces their platform's ease of use.

Take this example from their homepage:



The headline simplifies the solution MailChimp offers in a way everyone can understand.

Duluth Trading Company: Irreverent. Authoritative. Practical.

Duluth Trading Company specializes in durable yet appealing clothing for working people. This is reflected in their branding, which uses clever copy that clearly explains the benefits of their products, while standing out with understated humor.

This is clear when you visit their website. For example, take their No Tug Tank Top. It's a tank top that's longer in the back, to avoid needing to be tugged down when leaning over (as one might do while gardening).

If you go into one of their stores, the signage reflects a similar personality:

Apple: Clean. Simple. Confident.

As the world's most valuable company, almost no one pairs powerful products with a confident voice as well as Apple.

Whether you're on their website ...

… or flipping past a print ad …

Source: https://www.flickr.com/photos/markgregory/15270516027

… the look is always clean and the copy is always punchy. Like Apple products and software, everything feels and sounds as though it's meant to get out of your way.

Establishing Your Own Brand's Voice In 7 Steps

Enforcing branding across all your marketing materials might feel intimidating. But, it doesn't have to be difficult. Follow this process to get the job done.

Step 1: Review Your Company's Mission Statement

Your personality should reflect your values. And your values should be easily found in your mission statement. If your company has one (or something similar), it should offer a good starting point for figuring out how your marketing efforts can connect your values to your brand.

Since they do an excellent job at all things marketing, look at MailChimp's mission statement:

> **About MailChimp**
>
> MailChimp is the world's leading marketing platform for small business. We democratize cutting-edge marketing technology for small businesses, creating innovative products that empower our customers to grow. Millions of people and businesses around the world trust MailChimp to publish the right content, to the right person, at the right place, at the right time. The company started in 2001 as a side project; today, MailChimp is still 100% founder owned, highly profitable, and headquartered in Atlanta with additional offices in Brooklyn and Oakland.

Helping small businesses succeed is at the core of what they do. So, it makes sense that they often strike a warm and helpful tone across their marketing efforts.

Here is how they describe their voice on their public style guide:

Voice

MailChimp's voice is human. It's familiar, friendly, and straightforward. Our priority is explaining our products and helping our users get their work done so they can get on with their lives. We want to educate people without patronizing or confusing them.

One way to think of our voice is to compare what it is to what it isn't. MailChimp's voice is:

- Fun but not silly
- Confident but not cocky
- Smart but not stodgy
- Informal but not sloppy
- Helpful but not overbearing
- Expert but not bossy
- Weird but not inappropriate

All their brand adjectives connect back to being useful and welcoming.

Step 2: Audit Your Current Content and Messaging

If you already have content or copy you've produced, it's time to do a brief audit. Review your marketing assets, which may include the following (and more):

- Website
- Blog posts
- Social media posts
- Videos
- Print collateral
- In-store signage
- TV spots
- Radio ads

Then, note any common themes or consistencies in messaging and tone. Does your current voice fit your values and brand purpose? If not, how can it be improved?

Pay particularly close attention to your best-performing pieces (whether these are blog posts, videos, website pages, social media posts, or other content). These may tell you the most about what resonates with your audience.

Step 3: Do an Audience Survey

If you have an audience already, create a simple poll asking how they see your brand. Include the following questions:

1. How would you describe our brand?
2. If our company were a person, what would it sound like?
3. Do you find our tone appropriate?

You can create a poll easily using Survey Monkey or Polldaddy. Then, use social media to share the survey with your followers, or send it to your email list.

Step 4: Research Your Audience, Too

A simple exercise to even better understand your target audience is to grab a small sample of your current best customers and research them:

1. Choose five of your existing best customers.
2. Search for each name in Google.
3. Review their social network activity to understand:
    - Interests (e.g. do they watch comedies? If yes, they may appreciate humor in your brand voice)
    - How they write (e.g. are they formal? If yes, they may appreciate your brand voice to be more academic)
    - Publications they read (e.g. do they read sci-fi? If yes, include nerdy sci-fi puns as part of your brand voice)
    - Etc.

Write a list of the words that come to mind as you review each of these customers. Once you've done this process for every person in this sample, review each list for commonalities.

For example, when we followed this exercise at CoSchedule, we discovered:

- Our target audience is dominantly females who are obsessed with marketing, yoga, rock climbing, outdoorsy stuff (kayaking, hiking, biking), classic sports – i.e. baseball... basically, **anything trendy**.
- They eat local or take-out (delivery), fancy donuts, coffee, kombucha, craft breweries.
- They read, watch, and listen to TED talks, CoSchedule, heavy users on Pinterest and Instagram, read a lot of fiction (**snarky/sassy fiction**), "how to hack/organize my life" style books (self-help/self-improvement).

This is helpful because your brand voice should feel familiar + similar + natural to your target audience. Your voice needs to come off as someone they'd get along with + build a relationship with.

For example, CoSchedule's brand voice might sound something like this:

30-somethin' witty, smart female marketer who's humble, helpful, and confident. Think Emma Stone — sarcastic, witty, but sweet.

Step 5: Do a 'We're This, Not That' Exercise

Sometimes, in order to figure out what you are, it helps to figure out what you're not, as well. Try filling in the blanks in this sentence:

"We're _______ , but we're not _______ ."

Then, repeat this process several times until you arrive at three or four sentences that best describe your brand. Here's what this might look like when you're finished:

"We're authoritative, but not too serious."

"We're funny, but not sarcastic."

"We're friendly, but not sappy."

Step 6: Create a Brand Voice Chart

Next, take the three to four words that best represent your brand, and complete a chart that looks like the one below, explaining how each trait should and shouldn't be represented in your marketing:

Brand Voice Chart

Voice Characteristic	Description	Do	Don't
Passionate	We're passionate about changing the way the world works.	• Use strong verbs • Be champions for (industry) • Be cheerleaders	• Be lukewarm, wishy-washy • Use passive voice
Quirky	We're not afraid to challenge the status quo and be ourselves.	• Use unexpected examples • Take the contrarian view • Express yourself	• Use too much slang or obscure references • Use overplayed examples • Lose sight of the audience and core message
Irreverent	We take our product seriously; we don't take ourselves seriously.	• Be playful • Use colorful illustrations or examples	• Be too casual • Use too many obscure pop-culture examples
Authentic	We're going to give you the tools and insight you need to make your job easier. That may not always be through our product.	• Be honest and direct • Stick to your word • Own any issues or mistakes, and show how you will address them	• Use marketing jargon • Over promise • Over sell the product's capabilities

Source: Content Marketing Institute

CoSchedule

This is simple to do using the template included in this chapter.

1. List your brand characteristics on the left.
2. Include a brief explanation of each trait in the next column.
3. Explain how to use (and not use) this trait in the next two columns.

Once you're done, the completed template should look something like this:

[COMPANY NAME] Brand Voice Chart

Trait	Description	Do	Don't
Funny	Our copy is unafraid to make people laugh.	Use humor (with care)	Be too goofy.
Authoritative	Our content should be well-researched and sound confident in its accuracy.	Cite reputable sources and sound sure of yourself when writing.	Be cocky or condescending.
Helpful	Our voice should sound like someone who genuinely wants to help solve a customer's problems.	Reassure the reader that it's okay if tasks are challenging, and take the time to explain concepts in detail.	Sound overly friendly.

Keep this on hand for writers to use as a reference.

Create Step 7: Enforce Consistency With Clearly Documented Guidelines

When your team members and coworkers are producing content, it's helpful to provide clear guidelines they can refer to.

This helps ensure that your brand standards are maintained, and that every customer-facing asset your company creates sounds like one brand (even if you have several different people creating content and writing copy).

Brittany Berger wrote about this topic in-depth on the CoSchedule Blog. Here are the five most important benefits she highlights for having your guidelines written down and made accessible:

To make documenting your guidelines easy, use the template included in this lesson.

Applying The Appropriate Tone To Your Voice

Different tones may be necessary for different circumstances. This could depend on the message, the platform, or the segment of your audience you're trying to reach.

For example, if you had to deliver bad news, you wouldn't want to sound cheerful. Or, if you're writing a script for a how-to video, you may not want to sound overly stuffy or serious.

So, what's a marketer to do?

MailChimp addresses this with a brief explanation:

MailChimp addresses this with a brief explanation:

> **Tone**
>
> MailChimp's tone is usually informal, but it's always more important to be clear than entertaining. When you're writing, consider the reader's state of mind. Are they relieved to be finished with a campaign? Are they confused and seeking our help on Twitter? Are they curious about a post on our blog? Once you have an idea of their emotional state, you can adjust your tone accordingly.
>
> MailChimp has a sense of humor, so feel free to be funny when it's appropriate and when it comes naturally to you. But don't go out of your way to make a joke—forced humor can be worse than none at all. If you're unsure, keep a straight face.

What Tone for Which Circumstances?

You, too, can draft a simple explanation for anyone writing content or copy within your organization.

Start by answering this question:

Is our tone generally formal or informal?

From there, determine how your tone might change based on the medium:

- Under normal circumstances, our voice should be [FORMAL/INFORMAL].
- When responding to a customer, adopt a tone that matches the conversation. Ex: respond to praise gracefully, and complaints with concern.
- When sharing bad news, treat the matter seriously.

Then, write a brief description of the tone writers should use, given various contexts they may face on the job.

You're Done!

You now have a working knowledge of brand voice and tone, their importance, and how to develop each one successfully.

CHAPTER 10

How to Develop a Marketing Planning Process

What if you could get organized, use your time more efficiently, and focus on the right projects every time?

Well, you'd be a marketing wizard of awesomeness. And to become that kind of awesome, you're looking into improving your marketing planning process.

Luckily for you, you've found the super nerds at CoSchedule who eat, live, and breathe this stuff. Just look at us:

So we wanted to share the marketing planning process we use at CoSchedule and how you can:

- **Find the missing gaps in your current marketing process** to plan content that will produce even bigger results.
- **Organize and prioritize the right projects** that will turn your marketing team into a proven revenue driver.

- **Work even more efficiently** by removing projects from your to-do list that don't add measurable growth.

The best part? You're going to learn how to do all of this in a single day.

Get ready to become a marketing planning magician.

What Is A Marketing Planning Process?

> *An intentional and repeatable process for determining the high-level marketing projects, campaigns, and tactics an organization will execute.*

Why Is Having A Planning Process Meeting Important?

Somewhere along the lines, you were told you needed a documented marketing plan or marketing strategy.

What if I told you that your documentation could start as simple as a picture of sticky notes stuck on a wall in chronological order?

Before documentation comes strategy, ideation, and planning. And that's what you're going to learn about now.

So for the sake of this post, the definition is this:

The marketing planning process identifies opportunities for 10x growth, prioritizes those opportunities, and removes obstacles before the projects begin.

Think of it this way:

There are a ton of things you could do. The marketing planning process helps you prioritize what you should do.

The first place to start is by creating a product backlog, according to agile project management methods.

For marketers, that means creating **a list of marketing projects prioritized from great for growth to least.** From there, you'll know what projects to take on from first to last.

The best way we've found to create that prioritized list is by involving the team early on.

In their book, *Sprint*, authors Jake Knapp, John Zeratsky, and Braden Kowitz suggest that by involving more team members in initial planning, the more they'll champion your projects down the road:

> *By asking people for their input early in the process, you help them feel invested in the outcome. Later, when you begin executing your successful solutions, the experts you brought in will probably be among your biggest supporters.*

"By asking people for their input early in the process, you help them feel invested in the outcome. Later, when you begin executing your successful solutions, the experts you brought in will probably be among your biggest supporters."

—Sprint by Jake Knapp, John Zeratsky, and Braden Kowitz

CoSchedule

There's a process we've developed called the roadmap summit to help you do exactly that. It's a full-day team meeting with a series of exercises to come up with ideas and prioritize them in your project backlog.

This marketing planning process can be done in a day (which is what we recommend to make big decisions quickly and then get to work), or you can spread them out throughout a week or even longer. There is a lot of advice about collaboration, but these exercises also work for solo marketers.

(Oh, and by the way, Jake and Co. from Google Ventures believe you can build the prototype behind a huge project in *five* days. So I'm sure they'd be excited to see what you can do for planning in *one*.)

Schedule A Marketing Roadmap Summit To Prioritize The Best Projects

The purpose of a marketing roadmap summit is to develop a prioritized project list and vision for the upcoming four weeks, six months, and year:

1. **Four weeks:** The nuts and bolts, dialed-in version of what you'll create immediately after your roadmap summit.
2. **Six months:** The concrete plan toward your year vision.
3. **12 months:** Your long-term vision that answers the question, "How will the world have changed because of what we did?"

It might sound like a tall order.

But letting your team know right off the bat that this meeting is about planning projects that will produce measurable results and *literally change the world* will help them feel super invested in your plans. They'll give it their all when you start working through your projects.

From here, you need to prep a few things to make your marketing roadmap summit successful:

- **Define the rules:** Meetings are pointless if the attendees aren't 100% invested in the outcome. Help them come prepared by knowing the purpose, telling them to shut off all distractions, and focusing on the big picture instead of small details.

- **Prepare for collaboration:** Make a checklist for yourself of the tools you'll need to lead a successful brainstorming meeting (or use the meeting agenda that complements this guide). That checklist should probably include white boards, poster-size Post-It notes, normal-sized Post-It notes, stickers, dry erase markers, masking tape, stop watch, healthy snacks and drinks, and any technology like projectors and extension cables you may need to run the summit.
- **Host it outside the office:** There's something unique that happens when people step off-site for a summit... it feels bigger than a normal meeting. Find somewhere else to work with a creative atmosphere, and cater in food or treat everyone to lunch. Making it feel special will produce special ideas.

Takeaways:

1. Find a day when your team can join you for a marketing roadmap summit.
2. Book a conference room in your local coworking space, library, coffee shop—anywhere that's creative and outside of the office where you typically work.
3. Make reservations with a healthy restaurant within walking distance of your venue (or make plans for catering in). Changing your surroundings, walking, and trying something new are all proven to increase creativity.
4. Gather the items you need to rock a successful meeting (again, there's a checklist in your meeting agenda).
5. Invite your team to the summit with a note that hypes them up because they get to be involved in the planning.

You could write a note like this to attach to the invite:

Hey team!

Get ready for a super exciting day to help us plan the next six months of projects, along with the vision for marketing in the next year.

I've got the day under control complete with a cool location outside the office at (awesome venue) and I'm treating all of you to lunch at (super good restaurant).

Some homework for you to think about before we meet... think through the answers to this question:

What are our biggest opportunities to grow our company in the next year?

That will be the basis for our conversation throughout the day, and it's going to be a big one. So some ground rules are to turn off all distractions and to focus on the big wins instead of small details.

This is gonna be fun!

Start your meeting by defining the 4-6-12 goals in the morning, break for lunch, then brainstorm and prioritize the projects that will accomplish those goals.

Here's how to do it:

Begin With An Ice Breaker (10 Minutes)

Now, I know how cheesy these can be. But when done right, you can get your entire team in a collaborative and creative mood to kick off your marketing roadmap summit with the right attitude focused on innovation.

An exercise we've used in the past is to number everyone off into small groups of two or three. From there, ask them:

What can you do with a concrete block?

The obvious answers will come up, but then creative ones will follow:

Use them for building a house!

Prop up a car like a jack!

Put them in the bathroom as a stepping stool for my kids to reach the sink!

You'll see unconventional ideas start to form—and the small teams will start to collaborate—which is exactly what you need. Plus, you'll use these small groups to easily run breakout exercises throughout the day.

Takeaways:

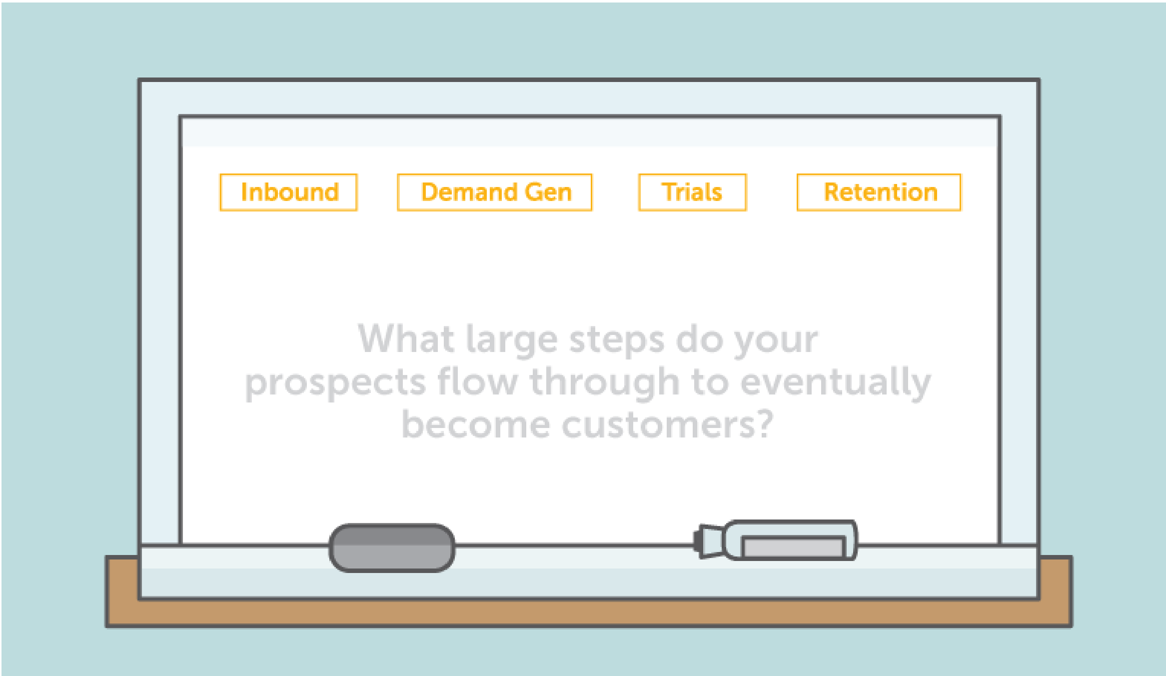
1. Start by reminding your team of the rules: Turn off phones and laptops and get 'em out of sight.
2. Let them know the purpose of the roadmap summit is to define your vision for the next year, and plan your projects for the next six months.
3. Jump into an ice breaker to split into small groups and inspire creativity.

Note: Some folks don't believe that group brainstorming works. If that's the case for your team, just work individually instead of breaking into small groups throughout the day. All of the exercises will still work.

Build Your Map And Find Your Destination (50 Minutes)

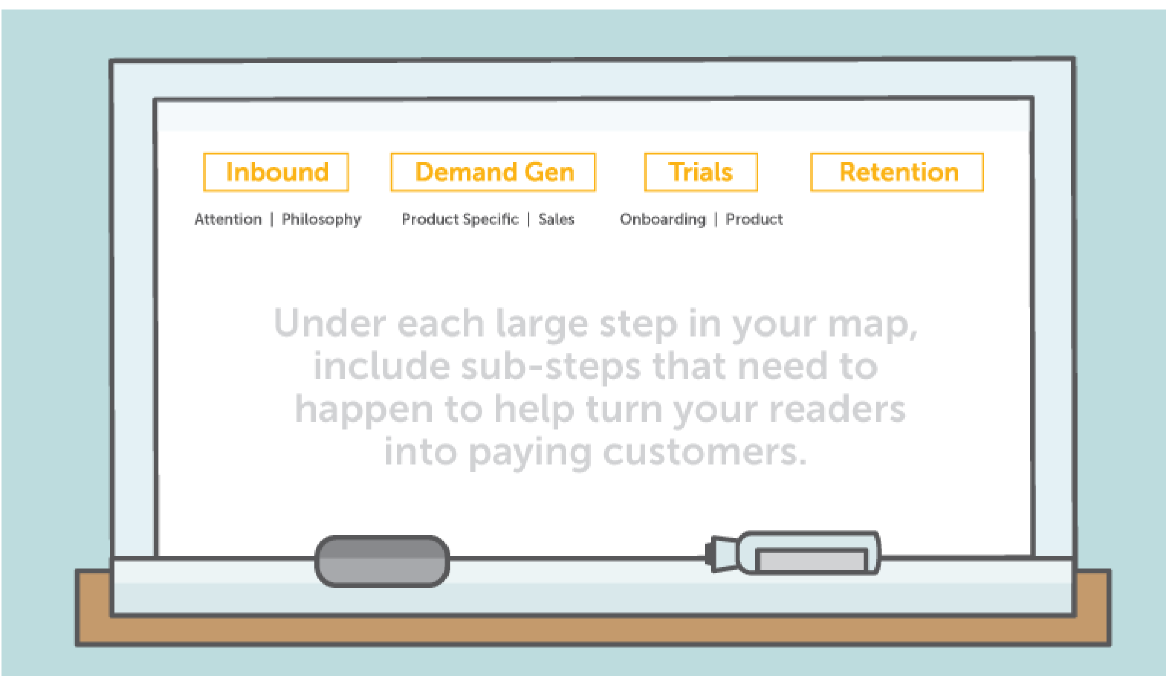
You're already publishing some forms of content. It's helpful to come to the summit prepared and understanding *where* that content falls in your marketing funnel to find the gaps that are leaking traffic, followers, subscribers, and leads.

The first step is to map out your marketing funnel. What large steps do your prospects flow through to eventually become customers?



You can see, you're not looking for the Awareness, Interest, Desire, And Action funnel in the traditional marketing sense. You're looking for a map of the process a typical customer may go through when experiencing your brand.

Under each large step in your map, include sub-steps that need to happen to help turn your readers into paying customers.



The point here is to seriously think about the content your audience needs to know, like, and trust you. Once you have their confidence that you can solve their biggest challenges, you'll win the sale.

This exercise is helpful for identifying the areas that are missing content that your audience would find helpful for solving a problem.

Now that you know the background, break into the small groups you formed in the ice breaker and have each group create a marketing funnel. Afterward, give each team five minutes to present their funnels.

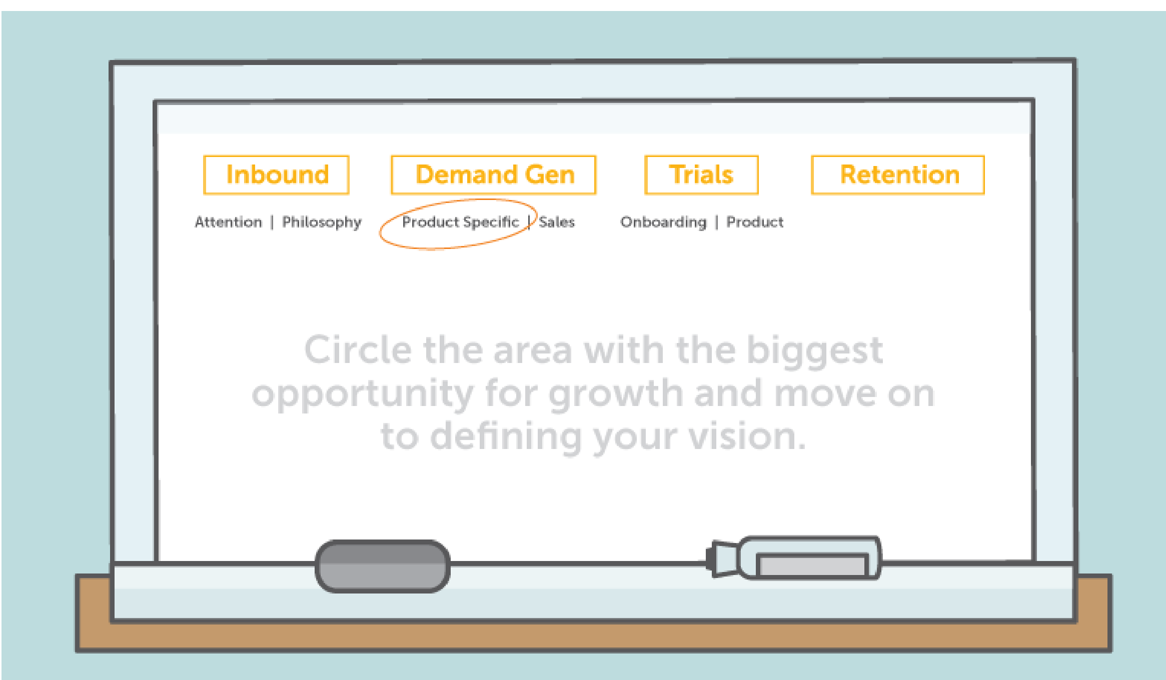
Note the similarities from all of the funnels—and the biggest areas of opportunity—and create one master funnel on your white board. Ask your team:

Where on this map is our biggest opportunity for 10x growth?

If you need to explain 10x growth, think of it this way:

- **10% growth** is where you can make slight improvements to do what you're doing slightly better.
- **10x growth** involves risky moves you may have never done before but have the opportunity to double, triple, or even quadruple your results. These are big ideas that—if you did them well—would make the rest of your industry look like they aren't even trying.

On your white board, circle the area with the biggest opportunity for growth and move on to defining your vision on how you'll master that gap in your marketing funnel.



Takeaways:

1. Plan some time before your marketing roadmap summit to explore your marketing funnel for yourself. Ask yourself: What steps do our customers go through from awareness to purchase to retention?
2. In your summit, take 10 minutes to break into small groups to create the marketing funnels and add in the second layer—messaging and stories. Then have each group present their findings to the group, with you taking notes.
3. Sketch the ideal map on your white board with every group's suggestions.
4. Ask your team, "Where on this map is our biggest opportunity for 10x growth?" Give everyone a sticker and have them put it where they think the biggest opportunity is (this helps the quiet team members participate just as much as the loud ones). Circle your focus area as the one with the most stickers.

Note: There is no such thing as a true marketing funnel. It's super unlikely that a visitor will go through every step in one sitting and convert into a customer.

However, this exercise is helpful to point out the different messaging needs from your diverse audience.

It's about the messages—the stories—they need right now, and not the types of projects or content you could create. Some of your audience won't need certain stories at different points in your funnel, but the more you create at different points in your map, the more likely you'll be to serve a diverse set of needs.

Define Your Big, Hairy, Audacious Goal: The BHAG (40 Minutes)

The next exercise in your marketing roadmap summit is to work through the vision of what you'd like to accomplish throughout the following year.

This vision will roll up into your overarching company's vision or mission.

Split into your small groups and fill in the blanks:

In the following year, we will _____ because _____.

Here's an example to get you started:

In 2018, we will focus on in-depth, actionable, step-by-step content because we want to help our audience solve their problems themselves while seeing our product as a tool that can help them take control.

That's purely an example, but you get the idea. And when you share that with your team, they'll know what you're expecting of them.

After each group has a vision, collect them yourself and stick them on the wall. From there, you'll create a new mega vision by stealing the best pieces from every group.

Now you have a starting point to come up with the project ideas that will fulfill the vision.

Takeaways:

1. Give each group a poster-sized Post-It note and 15 minutes to fill in the blanks: In (Year), we will (focus) because (outcome).
2. Post each vision on a wall, then you read them out loud to the entire team. This prevents at least some bias.
3. Give everyone four stickers (or fewer depending on how many groups you have) to put next to their favorite parts in the visions.
4. Then spend the remaining time reviewing each group's thoughts and crafting the one best vision for your marketing planning.

What Are Your Top Problems? (20 Minutes)

Spend some time identifying the top problems your marketing team is facing. Don't focus on solutions yet—just the problems.

Why? You need to know what might prevent you from reaching your vision.

Give everyone a stack of Post-It notes and use these questions to get them started with individual brainstorming:

- What are our top problems as a marketing team?
- What are our threats?
- What are our weaknesses?

- What aren't we paying attention to that we should be?
- What changes are we seeing in our industry that we should be paying more attention to?

After 10 minutes, go around the group and ask them to read their problems out loud and stick them on the wall.

These are the roadblocks you either need to resolve now or as your team executes the projects to make your vision a reality. Some of these problems may also be resolved through the projects you'll take on.

Takeaways:

1. Write several open-ended questions on the white board and ask them to your team.
2. Give everyone Post-It notes and ask them to write the answers to your questions on them.
3. After about 10 minutes, go around the room and have each person present their top problems one by one, then post them on the wall.
4. Give everyone four stickers and ask them to place their stickers next to what they believe are the biggest marketing problems.
5. Move the notes with the most stickers to a part of the white board where you made your map. This white board now shows your biggest opportunities and challenges, which will be the areas you'll want to focus on when you brainstorm the projects that will help you reach your vision.

You're two hours deep into an aggressive marketing planning process, and it's probably feeling a bit intense right now. Break for lunch, get out of the room, and hang out together a bit.

Brainstorm The Projects That Will Make Your Vision A Reality (40 Minutes)

The next exercise is to spend some time individually writing down project ideas that will fulfill the vision. Have everyone write down their ideas one by one on Post-It notes.

For you, it helps to come to the marketing roadmap summit prepared with a list of projects you have thought about in the past. Just remember, some of those old ideas may not help with the vision you just defined with your team.

Here are some helpful guidelines to help you get the right kinds of ideas from your team:

- **Content types are not project ideas.** "Videos", for example, are a medium to share a message. You're looking for a bit more context behind an idea like that. A good example could be "Videos to show our team using the product to solve XYZ problem."

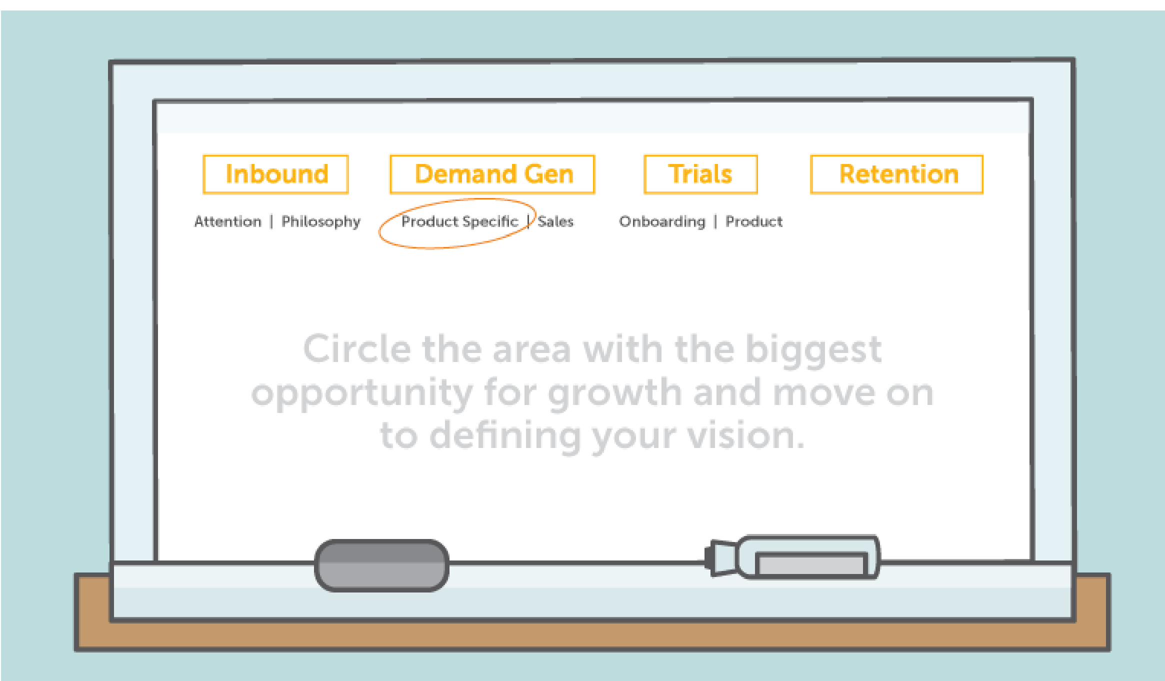
- **All ideas are good.** Even if you have reservations about a thought, write it down. Good ideas often build off seemingly one-off thoughts. And in the next step, you'll filter out the ideas that might not fit your vision.
- **Think big. Really big.** If you've never done a project that you think might work, that's exactly what you're looking for. 10x growth ideas don't come from status quo. Encourage out-of-the-norm, risky ideas that just might explode in your niche. Just because competitor X is doing something, that doesn't mean you should copycat.

Takeaways:

1. Before the marketing roadmap summit, review your current project backlog list if you have one. Just because ideas are old doesn't mean they're bad or won't fit your new vision.
2. As your team starts the exercise during your summit, kick it off by explaining that you're looking for project ideas and not just content types, that you want to hear all of their ideas, and to think of projects that have opportunity for 10x growth instead of 10% improvement.
3. Give them all a stack of Post-It notes and away they go.

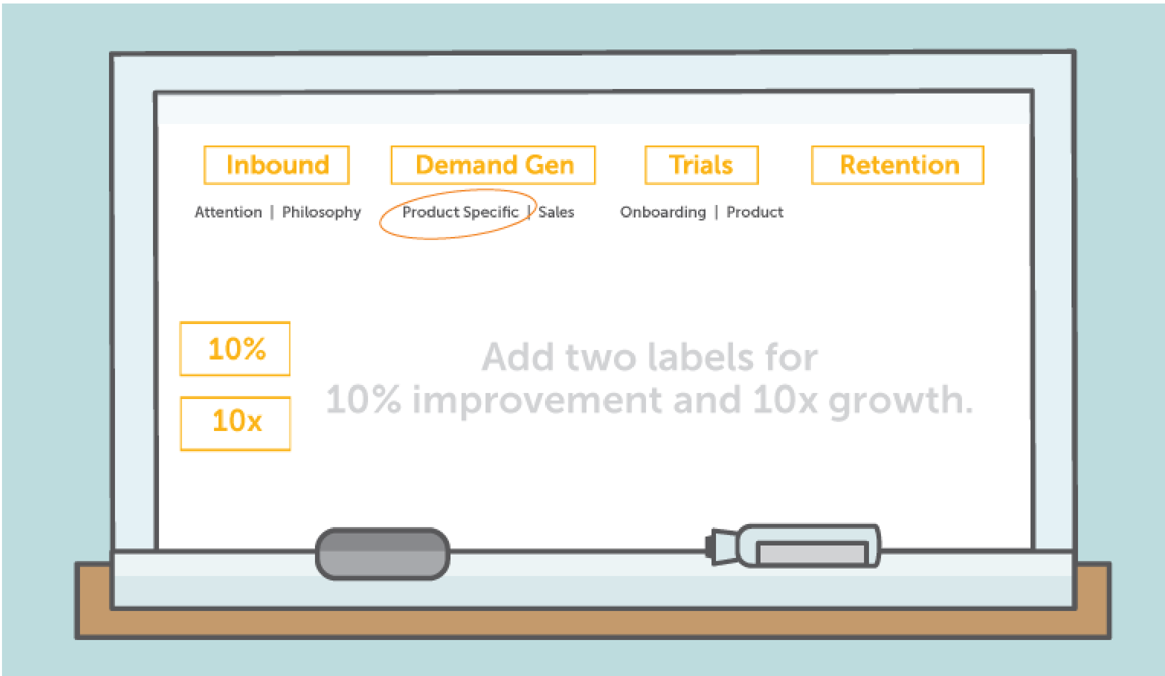
Prioritize Your Project Ideas On Your Roadmap (60 Minutes)

Remember when you drew out your marketing funnel, circled your biggest opportunity, and taught your team the difference between 10% improvement and 10x growth?

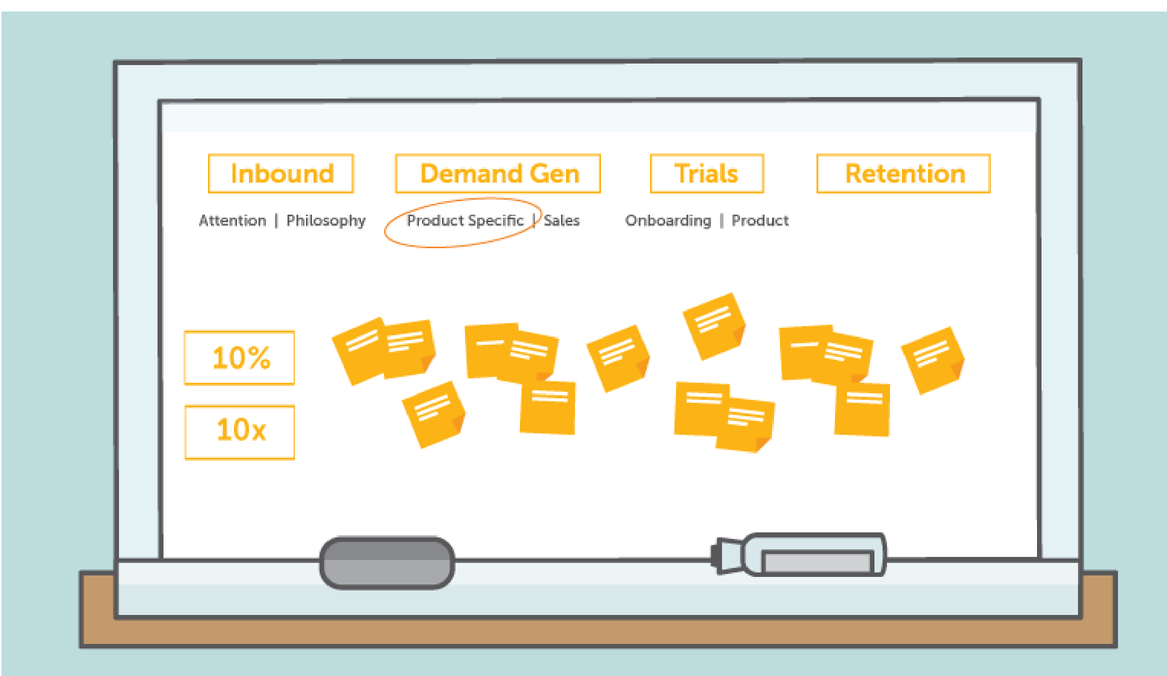


Now it's time to add another small layer to your map to help your team post their project ideas under each area of the funnel and prioritize them based on the biggest opportunity for growth.

On the white board, add two labels for *10% improvement* and *10x growth*.

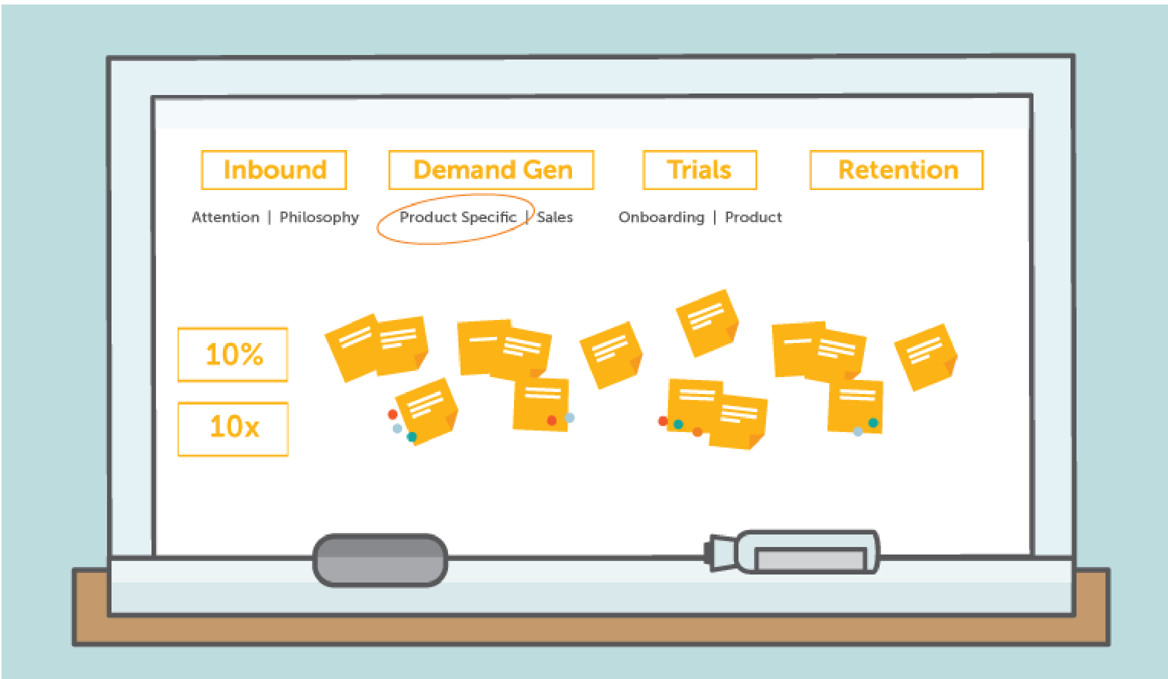


As the facilitator, ask your team to hand you all of their ideas. Then read them aloud one by one, get the team's feedback on placement, and map them on your funnel according to the best fit and opportunity for growth.



Once all the ideas are mapped, reread your Big, Hairy, Audacious Goal to your team. Check out which of the 10x ideas fit the vision—along with the circled destination of opportunity.

Give everyone on the team five stickers, and ask them to place them next to the projects they think have the biggest opportunity for 10x growth.



Chances are, the projects that are in the circled area of biggest opportunity should have the most stickers because they fulfill your vision.

Pick the projects that have the most stickers, and stick them in an order starting with most to least.

Now compare those projects to some of your top problems that the team created earlier. Will these projects solve the biggest problems? Do they fit with your vision? And do they capture your biggest opportunity?

Takeaways:

1. Under your marketing funnel map, add labels for 10x and 10%.
2. Gather all of the project idea Post-It notes from your team. Read them out loud, and ask for your team's input on where the project fits along the map (or in the top problems area) and whether that idea is a 10x or 10% idea. It's OK to use that as a scale instead of thinking of the labels as clearly defined rows. Stick each note where it fits best.
3. Read the vision statement out loud to your team. Then review the 10x ideas that seem to mesh well with your vision, specifically the circled opportunity on your map or in the top problems.
4. Hand out five stickers to everyone, and ask them to vote for the projects they think are the best opportunities for growth.
5. Grab the Post-It notes with the most stickers on them, and prioritize them in a line from most stickers to least.
6. Review those projects against your opportunity, vision, and top problems. Refine.

The outcome of this marketing planning process is your product backlog, as Chris and Hillary call it in *The Elements Of Scrum*.

For your purposes, this is now your marketing project backlog. It's completely prioritized according to what you and your team believe will help you accomplish your goals.

And the best part? Your team made this backlog, so they're now invested in making every project as successful as possible. They know your vision and they know exactly how they'll help make it a reality. Win-win-win.

Make Your Marketing Plan For The Next Four Weeks And Six Months

When you get back to the office, chances are that you'll have several projects to wrap up before you can start working through the new project backlog you just created in your marketing planning process.

That's what the four weeks is about.

Plan how you can finish the one-off projects you're currently working through now so you can strategically use your time for the projects that will execute your long-term vision in the following six months.

After your four weeks are up, start the first project in your prioritized list. It's not a perfect science, either—you may have ended up with projects that will take much longer than six months.

The point is that you found the largest area of opportunity, built a vision to capture that opportunity, and are now working on projects that will turn that vision into a reality.

How Will You Use This Marketing Planning Process?

If you've been cruising around the internet for information on marketing planning and strategy, the process you just learned about may sound completely different.

And that's a good thing. Because this works, and it's *proven* to be effective.

I encourage you to take a risk and try this out. After all, it just might make you the leading marketer in your niche... and all you have to lose is one day.

*I totally grabbed this tactic from the book *Sprint*. If you enjoy exercises like these, moving fast, and giving yourself deadlines to get more done in less time, I highly recommend reading the book.

CHAPTER 11

How to Prioritize 10X Marketing Campaign and Project Ideas

What Is Project Prioritization?

Project prioritization is the process that helps you take on the work that will influence your marketing goals most effectively.

Brainstorm Your Marketing Project Ideas

Your marketing project backlog is a list of every idea you think will help you reach your marketing goal most effectively.

The easiest way to begin your project backlog is to dedicate 30 minutes to ask one simple question:

What projects will help us reach our marketing goals most effectively?

For now, don't limit yourself. Don't even think about the marketing tactics you defined as part of your marketing strategy in Chapter 6.

Write down every idea; the following exercises will help you prioritize these projects further.

Use A Marketing Project Prioritization Matrix To Take On 10x Campaigns

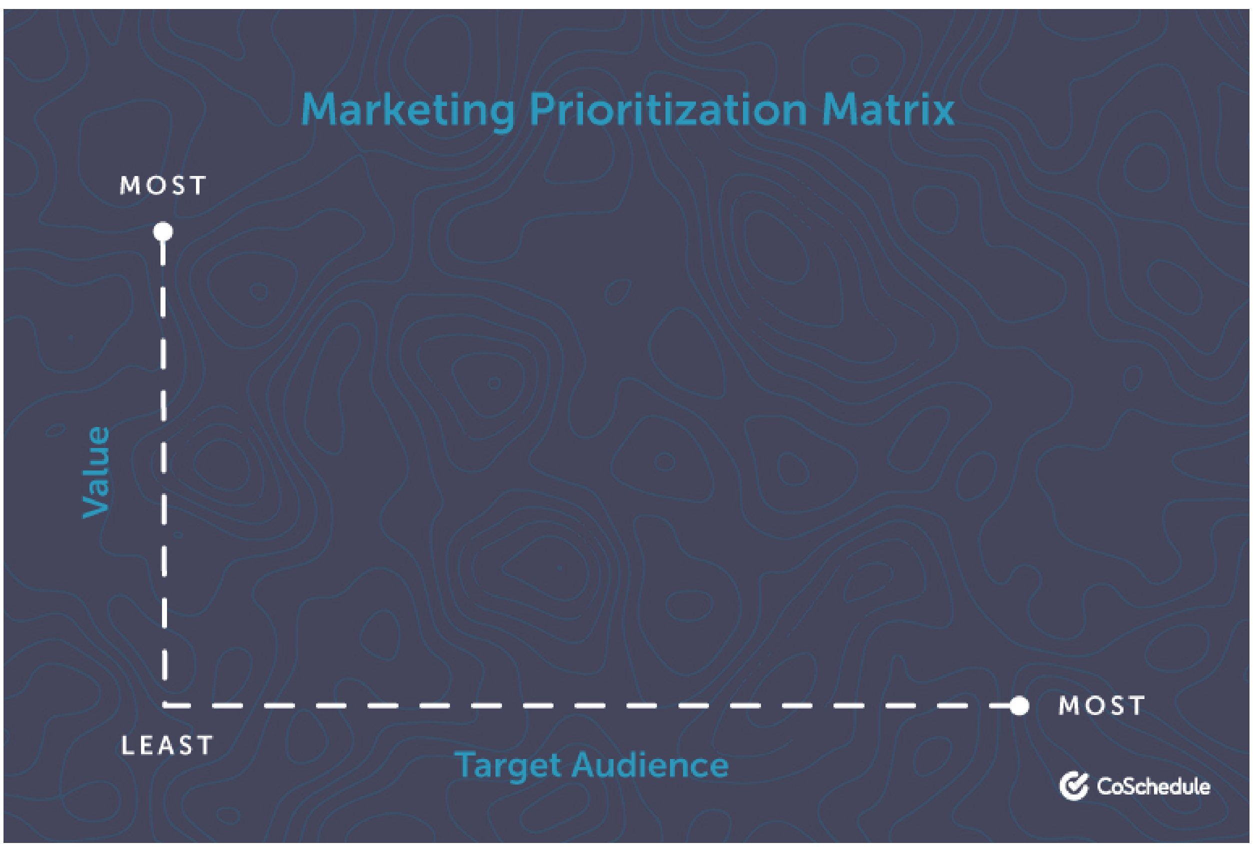
The most important project prioritization criterion is determining which ideas have the largest potential for providing 10x growth toward your marketing goal.

The 10x versus 10% framework will help you understand which projects to take on, and which projects to drop. Think of it like this:

- 10x ideas often provide the most value for the largest amount of your target audience. These provide repeatable, long-term growth toward your marketing goal. These ideas have the potential to boost your results 10 times over.
- 10% ideas often provide little value to a small amount of your target audience. These may include small optimizations, "low-hanging fruit", and projects that won't help you actually reach your marketing goals ten times faster than if you simply didn't do them at all.

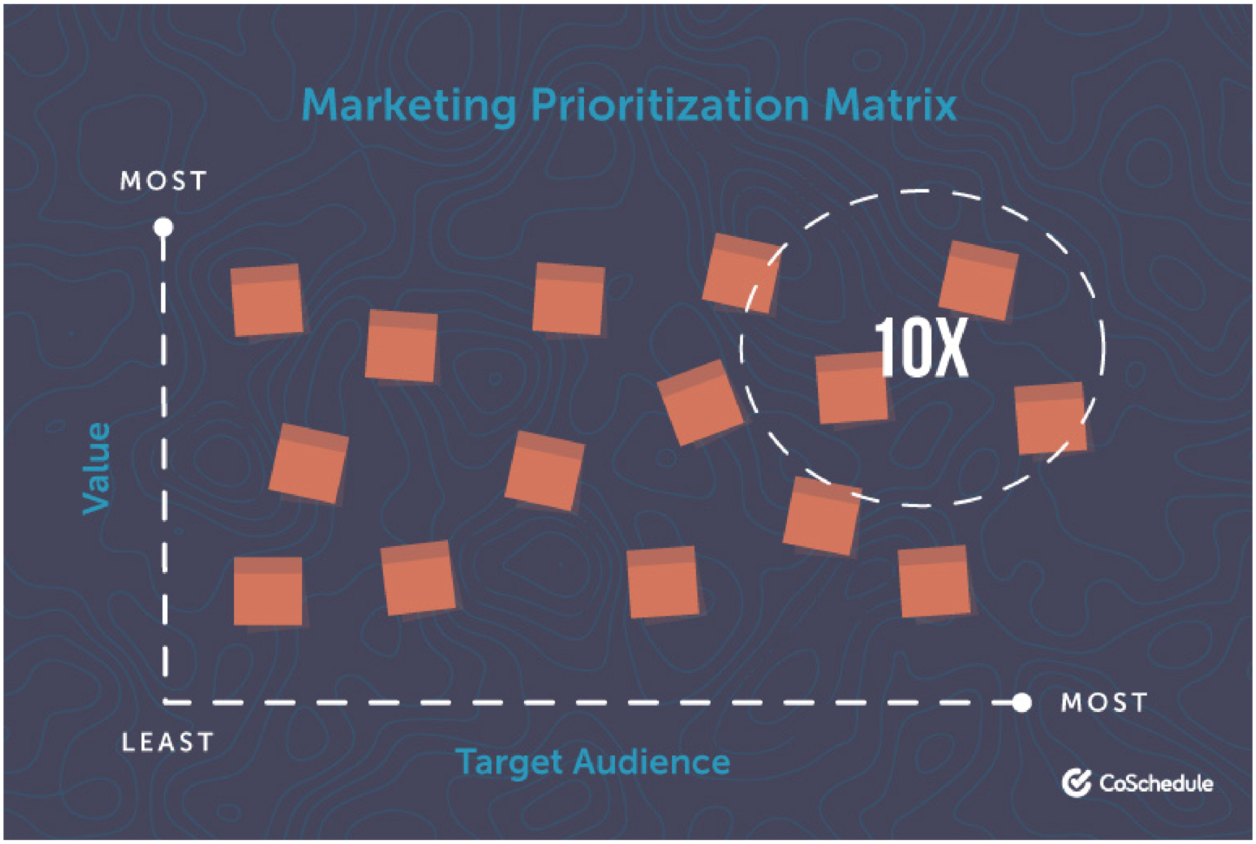
The easiest way to visualize which of your ideas are 10x and which are 10% is to add your sticky notes on a project prioritization matrix you sketch out on a whiteboard.

Draw an X/Y chart, labeling the vertical Y axis Value and the horizontal X axis Target Audience. I've found it helpful to draw arrows at the ends of both axis to visually indicate Most is at the outermost ends of the matrix.



Now review each idea and stick it on the project prioritization matrix where it fits best.

10x opportunities lie at the upper right part of the matrix (providing the most value to the largest amount of your target audience), whereas 10% ideas are near the lower left (providing the least value to the smallest amount of your target audience).



Grab the sticky notes in the upper right part of the project prioritization matrix and type them in column A (starting at cell A4) in the Project Backlog tab in your marketing strategy template.

While the ideas are fresh on your mind, use column B to document a Description of each idea. Simply explain why the idea will help you reach your marketing goal and what you'd do.

Rank Your Campaigns With Marketing Project Prioritization Criteria

By this point, you're only taking on projects that will have the biggest impact upon your marketing goals. So it makes sense to knock out the easiest projects first to reap those long-term results as quickly as possible.

Here are some additional marketing project prioritization criteria to weigh each idea against:

- **10x:** Is this idea a 10x growth opportunity or a 10% improvement? While you already did this, it's helpful to remind yourself to only take on 10x campaigns. Now's the time to get projects off the backlog that aren't 10x.

- **Marketing Tactics:** Does this idea complement the marketing tactics you've chosen to use to execute your strategy? If not, it might mean revising your marketing tactics or downplaying this project idea.
- **Effort:** Will this idea take lots of your team's time, require outside help, or need other teams involved? If the level of effort is extremely high, this might be a project you'll want to take on after you knock out the quick wins.
- **Maximize:** Does this idea maximize content you already have? If so, it's probably an easy one to knock out quickly.
- **Maintenance / Ongoing:** Can you publish this and reap lots of long-term benefits with little ongoing effort? Less maintenance = more productivity into other 10x projects, which is a good thing.
- **Credibility:** Will this idea establish you as a major player in your industry? Yes = absolutely a good thing.
- **Audience:** Does this idea target the right kind of prospects? You want to attract your marketing persona, not just a large number of people.
- **Cost:** Is this idea cheap or expensive to create and maintain? Expensive doesn't necessarily mean bad, but cheap to create may be an easy win.
- **Partnership Opportunities:** Does this idea give you opportunities to connect with influencers? Collaborations can help you reach a larger audience who may not know anything about your business, which is a good thing.
- **Expectation:** Does your target audience simply expect a business like yours to do an idea like this? For example, it's common practice for businesses to have blogs, so if yours doesn't, that idea is likely a high expectation from your prospects.

These are just some of the project prioritization criteria you can use to rank your ideas. There obviously may be more (or fewer) criteria for which you'd like to weigh your ideas against. Use these as a starting point.

In your marketing strategy template, the **Project Backlog** tab has all of these prioritization criteria listed in columns C-L.

At this point, you can rank each idea against the criteria. The template is designed on a scale of 1-5 for each of the criteria, with 5 being best and 1 be worst.

For example, if your idea will take very little **Effort**, rank that a 5. If your idea will take lots of **Maintenance**, rank that a 1.

The template will automatically calculate the sum of each idea's total score in column M. You'll want to prioritize the ideas that have the highest score. So, highlight all of the ideas from row 4 to column M and down, then go to **Data > Sort** by column M > **Order Z to A.**

The idea in row 4 is now the one you should knock out first, row 5 is second, and down the list you go.

Congrats! You've just prioritized your marketing projects!

CHAPTER 12

How to Plan Projects, Events, and Campaigns With Marketing Timelines

You're hard at work documenting an actionable marketing strategy.

And now it's time to map out timelines for all your marketing projects.

Marketing timelines make it easy for your entire team to see:

- Which projects are coming up in the pipeline.
- What they need to be working on right now.
- When their deadlines are (so they don't get missed).

Above all, they eliminate the panic of trying to map out projects and campaigns at the last minute.

In this chapter, we'll walk you through how to create marketing timelines for all your projects and campaigns.

What Is A Marketing Timeline?

> *A marketing timeline allows your entire marketing team to see all projects, events, campaigns, and sales that will be happening throughout the year. They can be used to map out deadlines on a quarterly, annual, or per-project basis.*

Why Should Your Team Have A Marketing Timeline

There are many reasons why a marketing team would adopt a marketing timeline into their overall marketing strategy.

1. Timelines allow your team to see a full overview of which marketing activities are coming up.
2. They allow you to (as we say at CoSchedule) plan your work, then work your plan. Planning ahead can mean the difference between a well-executed project and one that is thrown together haphazardly.
3. Finally, they help keep all of your marketing tasks on track. These brief overviews can show each member of your marketing team at a glance what they need to get done for a specific project and more importantly when it is due. That means less stress and fewer missed deadlines.

Create An Annual Marketing Timeline

The first timeline your marketing team will need to create is an annual marketing timeline. These should contain every project, sale, and campaign that you plan to run in a year.

Why is a timeline like this so important?

Because this timeline is the one that you will base every other marketing timeline after. This is your home base so to speak.

So let's move on to how to fill out the annual template that you just downloaded. In the bottom of your spreadsheet, there is a project notes section.

Project Notes

Project	Color	Start Date	End Date	Team	Budget	Resources	Goals	Notes
Project A								
Project B								
Project C								
Project D								
Project E								
Project F								
Project G								
Project H								
Project I								
Project J								

For each one of your projects, sales, and campaigns, fill out the:

- Title.
- The team that is responsible for this project.
- The budget your team has.
- Any resources you might need.
- The goals you have.

It should look something like this:

Project Notes

Project	Color	Start Date	End Date	Team	Budget	Resources	Goals	Notes
New Years Day Campaign				Sales	$1,000	NA	To promote our new line of products	
Project B								
Project C								
Project D								

Next, you need to fill out the start and end date of your campaign or project. These dates should begin the day you start your ideation (or planning process) for a specific campaign and end the day you complete your last report on said project.

Project Notes

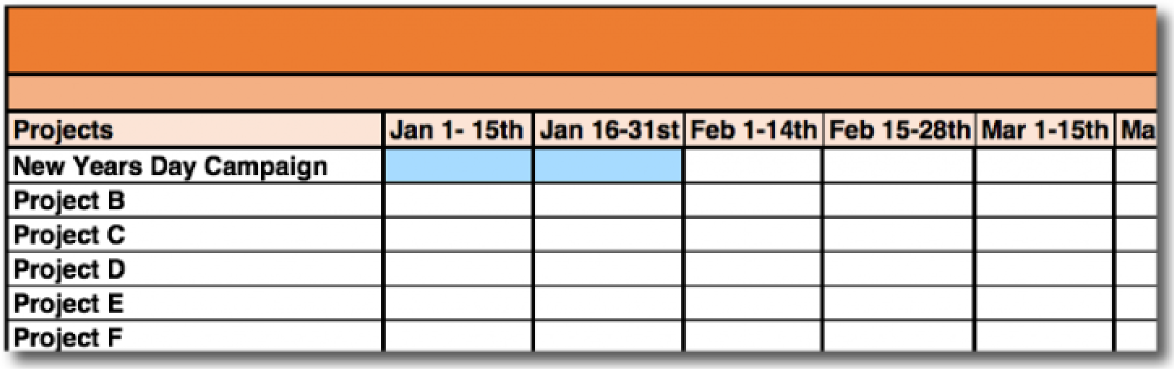
Project	Color	Start Date	End Date	Team	Budget	Resources	Goals	Notes
New Years Day Campaign		1/1/18	1/25/18	Sales	$1,000	NA	To promote our new line of products	
Project B								
Project C								
Project D								

The last thing you need to do in this section of your template is choose the color code for your proj-ect. This will be used in the top part of your template and will help you identify which project is which.

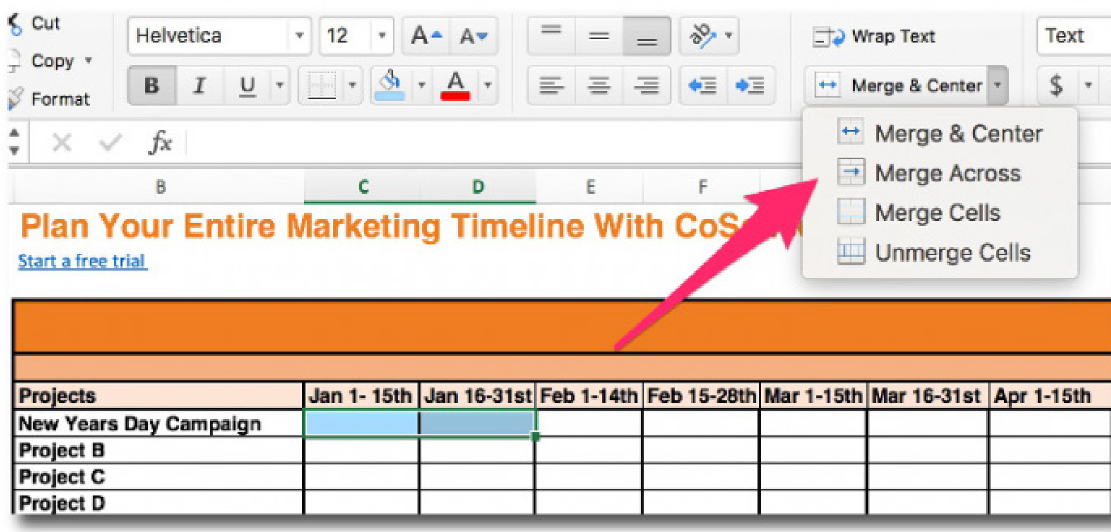
Project Notes

Project	Color	Start Date	End Date	Team	Budget	Resources	Goals	Notes
New Years Day Campaign		1/1/18	1/25/18	Sales	$1,000	NA	To promote our new line of products	
Project B								
Project C								
Project D								

After that go up to the top part of your marketing template and fill in the color code on the dates that your project will be running, so it looks like this.



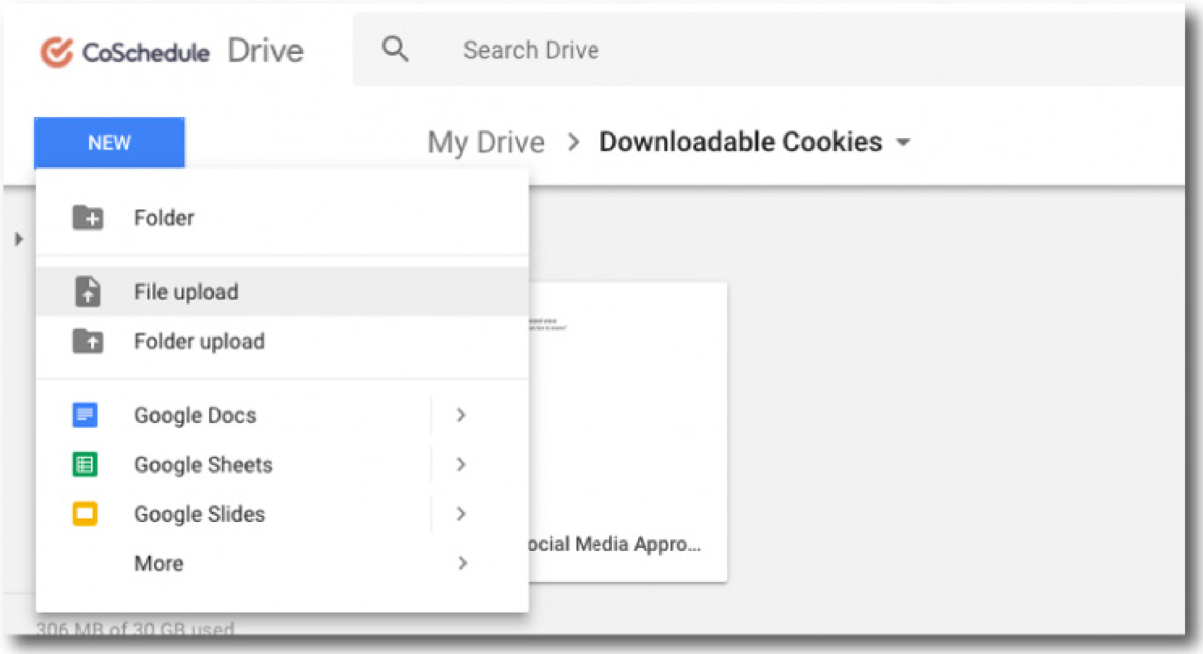
You can also merge the two sections by selecting Merge Across from the menu in Excel:



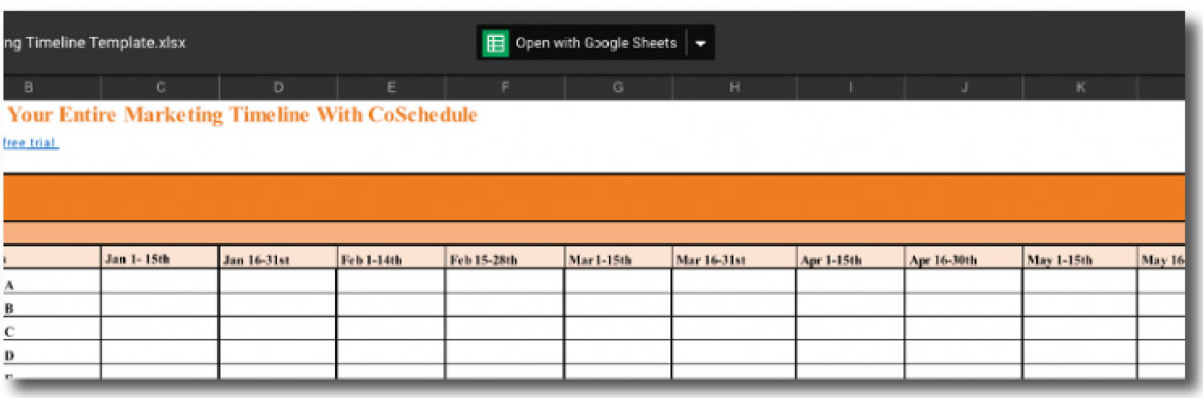
Repeat this process for every project until your timeline is filled in.

You can also create a more collaborative timeline by uploading your spreadsheet to Google Drive or another cloud-based program.

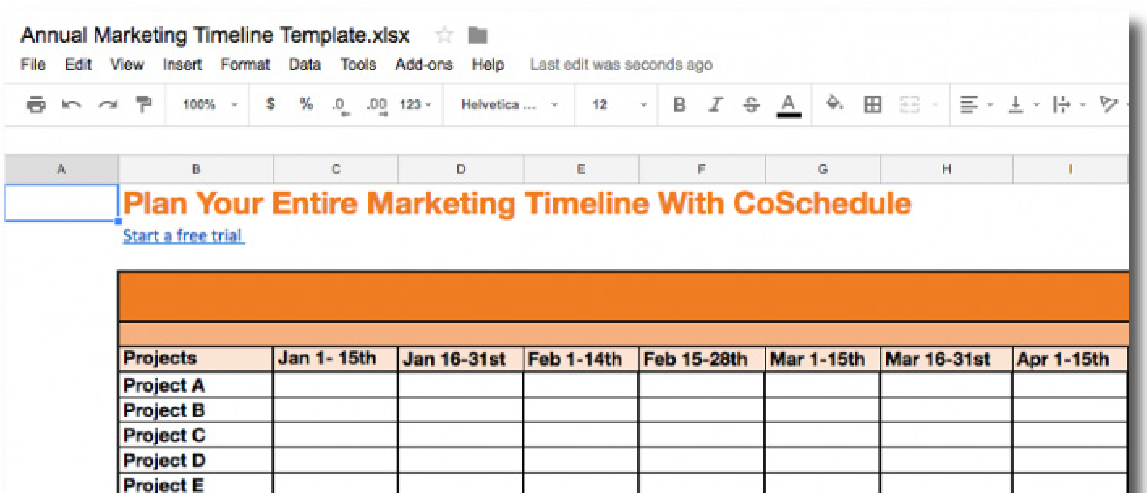
To convert your excel document to Google Sheets, go to your Drive and select **Upload a File**.

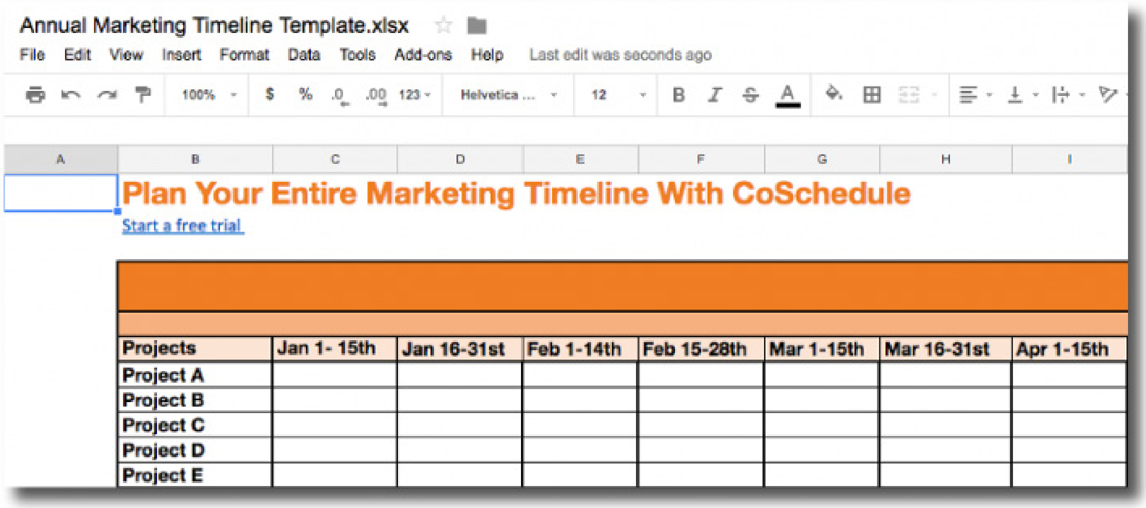


Select your annual template and click **Open with Google Sheets**.



After that Google should convert your template and you'll be able to share it in Google Drive.





Projects	Jan 1- 15th	Jan 16-31st	Feb 1-14th	Feb 15-28th	Mar 1-15th	Mar 16-31st	Apr 1-15th
Project A							
Project B							
Project C							
Project D							
Project E							

Organize Your Marketing And Sales Campaign Timeline

The next template we're going to walk you through how to use is your marketing and sales campaign timeline.

Your marketing and sales campaign timeline is going to help track every sale and accompanying promotional campaign. This will help you avoid last minute planning or forgetting about a sale entirely. (After all, as a marketer you have a lot to do.)

Before you begin to fill in your template you need to figure out the list of sales and campaigns that you're going to run for the year. Some common categories include:

- Holidays
- Seasonal Sales
- Events
- Anniversaries

If some of your sales recur annually, you can automatically add them to your calendar for next year. If you're looking to add new sales, use the list above to get started or use tools like National Day Calendar for inspiration.

Once you have your list of events or holidays that your sales are going to be based on you can add them to your timeline on the left-hand side.

Sales and Campaigns Timeline

Quarter	Q1								
Month	January					February			
Mondays Of Each Month	1	8	15	22	29	5	12	19	26
Sales Goal									
Actual Sales									
Seasonal Sales									
Spring									
Summer									
Fall									
Winter									
Holidays									
Christmas									
Events									
Company Milestones									

In your calendar highlight what times these sales and their campaigns will occur, so it looks something like this.

Sales and Campaigns Timeline

Quarter	Q1													
Month	January					February					March			
Mondays Of Each Month	1	8	15	22	29	5	12	19	26	—	5	12	19	26
Sales Goal														
Actual Sales														
Seasonal Sales														
Spring														
Summer														
Fall														
Winter														
Holidays														
Christmas														
Events														

As you continue to scroll down your template, you'll notice there are sections labeled for different marketing promotional tactics.

These are there so you can indicate to your team what tactics you'll be using to run the promotional campaigns that are attached to each sale. Some common tactics are:

- Social Media
- Blog posts
- Landing pages
- Email newsletters

- Press releases
- Print ads
- Billboards

You name it, you can probably use it to promote your next sale. Depending on what your company decides to do for tactics you can add or remove sections from your template.

National Marketing					
Tactic One					
Tactic Two					
Tactic Three					
Local Marketing					
Local newspaper insert					
Tactic Two					
Tactic Three					
Public Relations					
Press Releases					
Tactic Two					
Tactic Three					
Social Media					
Facebook Campaigns					
Twitter Campaigns					
Tactic Three					
Advertising					
Tactic One					
Tactic Two					
Tactic Three					

After you've determined your tactics highlight each week of a sale that you're going to be using a particular tactic, so it looks something like this.

Month	January					February		
Mondays Of Each Month	1	8	15	22	29	5	12	19
Sales Goal								
Actual Sales								
Seasonal Sales								
Spring								
Summer								
Fall								
Winter								
Holidays								
Christmas								
Events								
Company Milestones								
National Marketing								
Tactic One								
Tactic Two								
Tactic Three								
Local Marketing								
Local newspaper insert								
Tactic Two								

In the case of this example, you can see that during the first two weeks of your winter sale you'll be running an insert in the local newspapers.

Fill out each of your sales and campaigns until your template is complete.

Map Out Projects With Your Project Timeline Template

The next template in your bundle is your project timeline template. This template will help you break down each one of the projects and campaigns that you listed in your annual marketing timeline.

Why is a project timeline like this so critical? Each one of your projects is going to have multiple moving parts that can become hard to keep track of.

Your projects will be broken down into four phases:

Ideation

The ideation phase of your project planning is the first phase. This is where the initial idea of your project comes to fruition.

Your template should include the following steps:

- **Project plan:** What does the overarching process of your project planning look like?
- **Initial launch:** Decide when your official launch date will be.
- **Meeting set up:** When are you meetings going to occur and who needs to be in which ones?

In your template, it should look something like this.

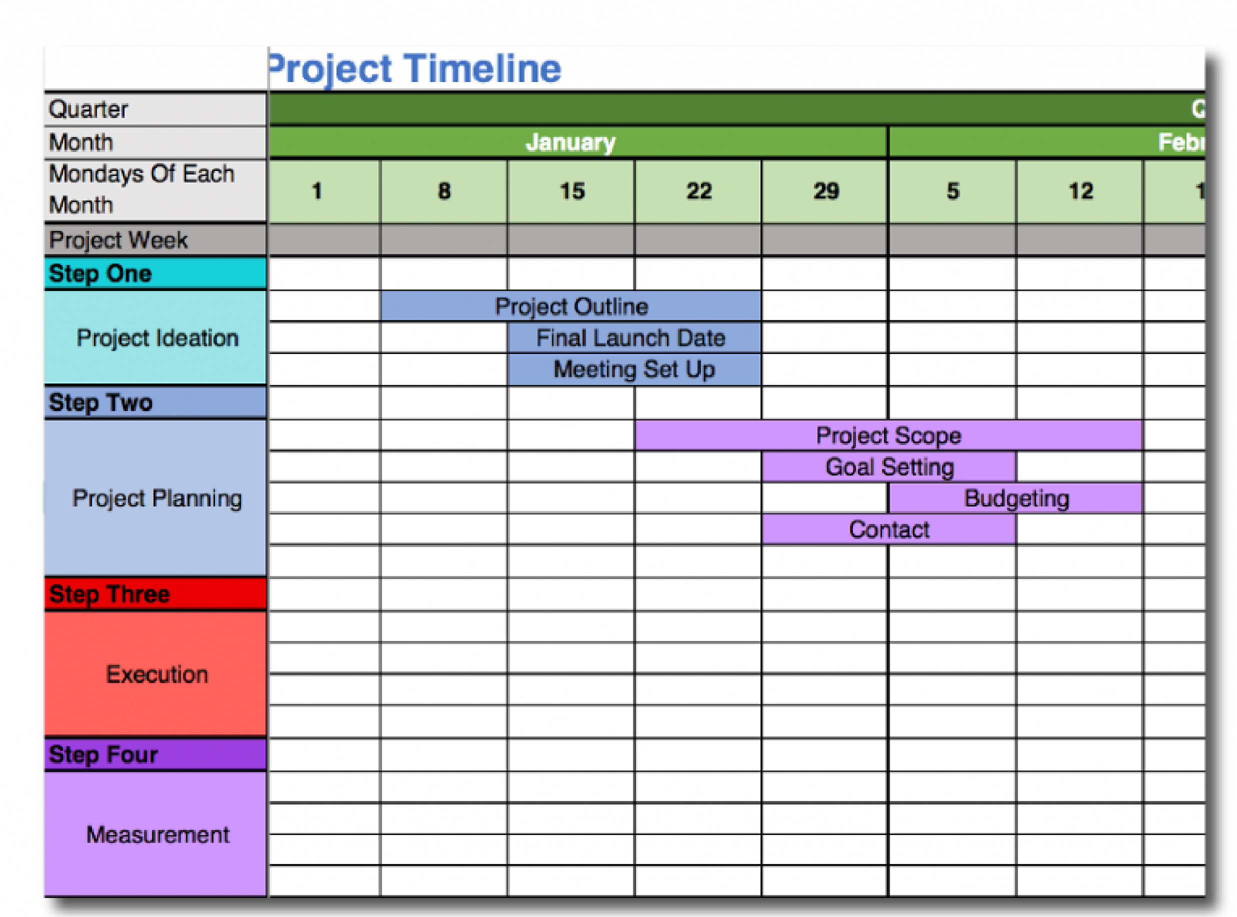
	Project Timeline						
Quarter							
Month	January						
Mondays Of Each Month	1	8	15	22	29	5	12
Project Week							
Step One							
Project Ideation		Project Outline					
			Final Launch Date				
			Meeting Set Up				
Step Two							
Project Planning							

Planning

The next phase of your project is the planning phase. This is the phase where you need to determine everything you need to do to hit publish on a project. It could include things like:

- **Project scope:** What needs to be completed to consider this project ready for launch?
- **Goal setting:** What are you hoping to achieve at the end of this project?
- **Budgeting:** What funds do you have to complete the project? Where are they going to go?
- **Work breakdown:** Who is doing what on this project? What are their deadlines?
- **Contacts:** Who are your key points of contact?

This is what it could look like in your template.



It's important to note that some of your planning steps may overlap with one another and that's okay!

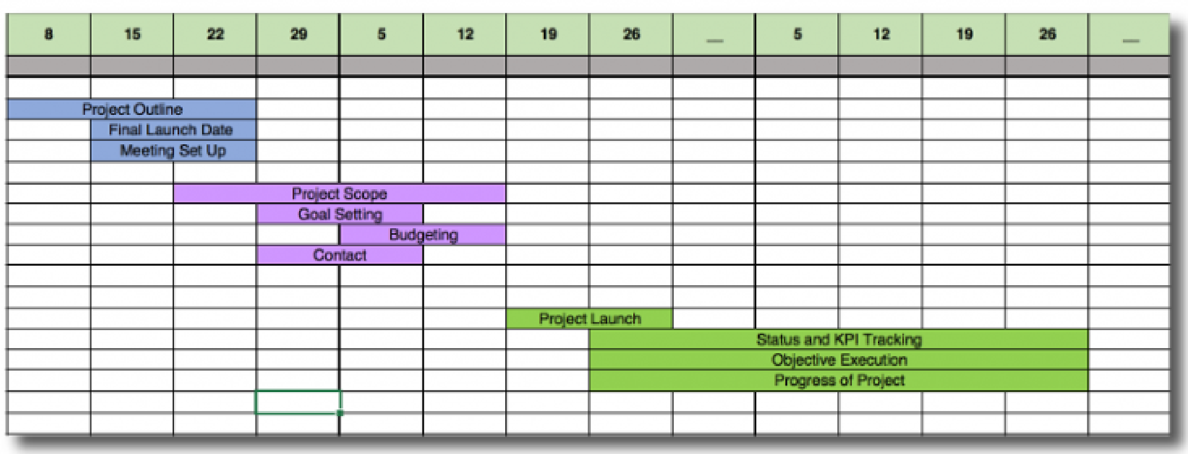
Execution

Next is the execution phase of your project. At this point, you've hit the Go button, and now you need to keep track of everything that is going on.

How you decide to keep track of your execution process will be up to you. Here are a few things you could add to your timeline.

- **Project launch:** When are you publishing your project?
- **Status and KPI tracking:** What is the status of your project and what metrics do you need to track to make sure that you're going to make your goal?
- **Objective execution:** Is each objective you planned being completed?
- **Performance of project:** What is the status of your project and can it run the full course of your plan?

In your template, it would look something like this.



This is one phase of your project where multiple steps will most likely be overlapping as you will be tracking a lot of metrics and data at one time.

Measurement

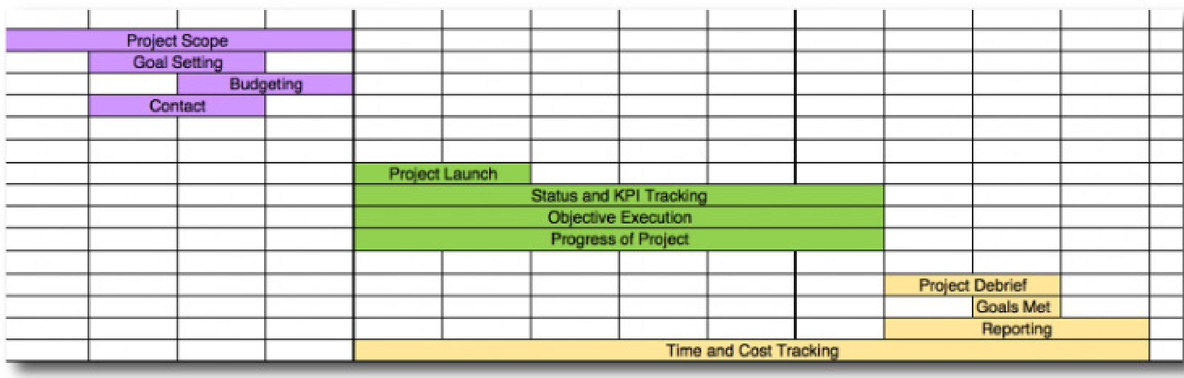
The last phase of your project is going to be measurement. In this phase, you're going to assess the data you gathered and determined if the project was a success or not.

This phase usually falls into four steps:

- **Project debrief:** Gather your team and talk about the successes (or failures) of the entire project.
- **Time and cost tracking:** Was your project completed on time and on budget?
- **Goals met:** Did you meet your goals?

- **Reporting:** Are there any reports that you need to put together for those who were not an active part of your project?

In your template, this final phase should look something like this.



Each project that you complete will need its own timeline so be sure to keep a blank copy of this template handy at all times.

Plan Events Marketing Event Timeline Template

The last template in your bundle is your marketing event timeline template. This template will help your team organize an event from start to finish.

Why is a timeline like this important?

Even if it is small, there are still lots of moving pieces that need to be taken care of in order to execute an event smoothly. Your timeline can help keep you on track and allow you to plan ahead for what is coming next.

Planning

The planning phase of your event usually happens six to eight months before your event takes place. Here are some steps you could take:

- **Ideation.** What do you want your event to be?
- **Setting goals.** What do you want your event to accomplish?
- **Defining roles and responsibilities.** Who is in charge and who is taking care of what part of your event?
- **Determining when and where event meetings take place.** Who needs to be at what meeting when?
- **Deciding how many attendees need to be at an event.** Is your event being enacted on a large scale with hundreds of people or are you planning a small get together?
- **Setting an event budget.** How much money does your event planning committee have to spend?
- **Finding your vendors and venue.** Where is your event taking place and who will be taking care of details like food, music, etc.
- **Creating an emergency plan.** What happens if something goes wrong at the venue, weather, etc.?

Fill in each part of your planning process and the dates it needs to take place on in your template.

Event Marketing Timeline

Quarter	Q1									
Month	January					February				
Mondays Of Each Month	1	8	15	22	29	5	12	19	26	__
Step One										
Ideation	Ideation									
		Goal Setting								
		Roles & Responsibilities								
			Meetings							
				Attendee Estimate						
				Event Budget						
				Vendors & Venue						
					Emergency Prep					
Step Two										

As with some of the other templates and plans, it's common to see tasks overlap.

Promotion

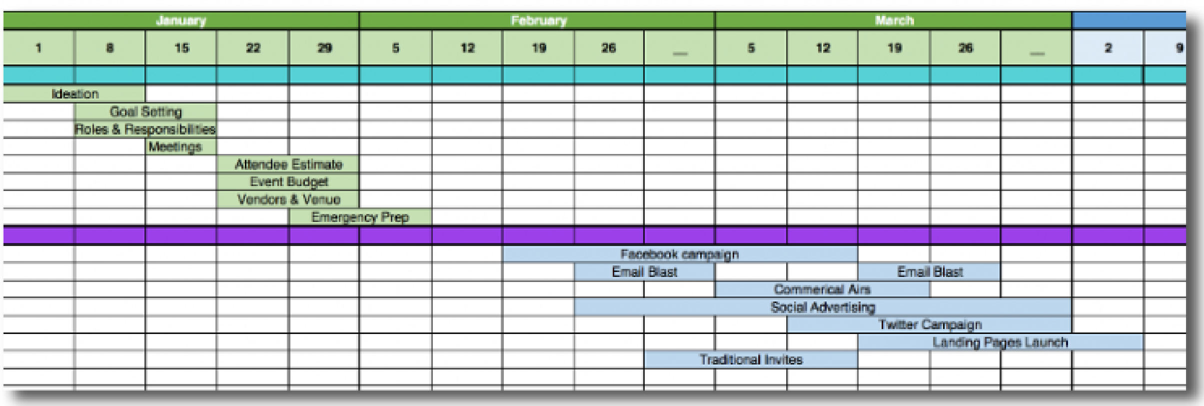
The next phase of your event planning is going to focus solely on promoting said event.

As a committee, you need to determine what channels you're going to promote your event on, what tactics you're going to use, and when each of your promotions is going to launch.

Some examples of promotions you could run are:

- Social campaigns promoting your event.
- Including event information in your email newsletters.
- In-store signage
- Printing promotional posters and more.

Once you've determined your tactics and promotions record their start and end dates in your timeline, so they look like this.



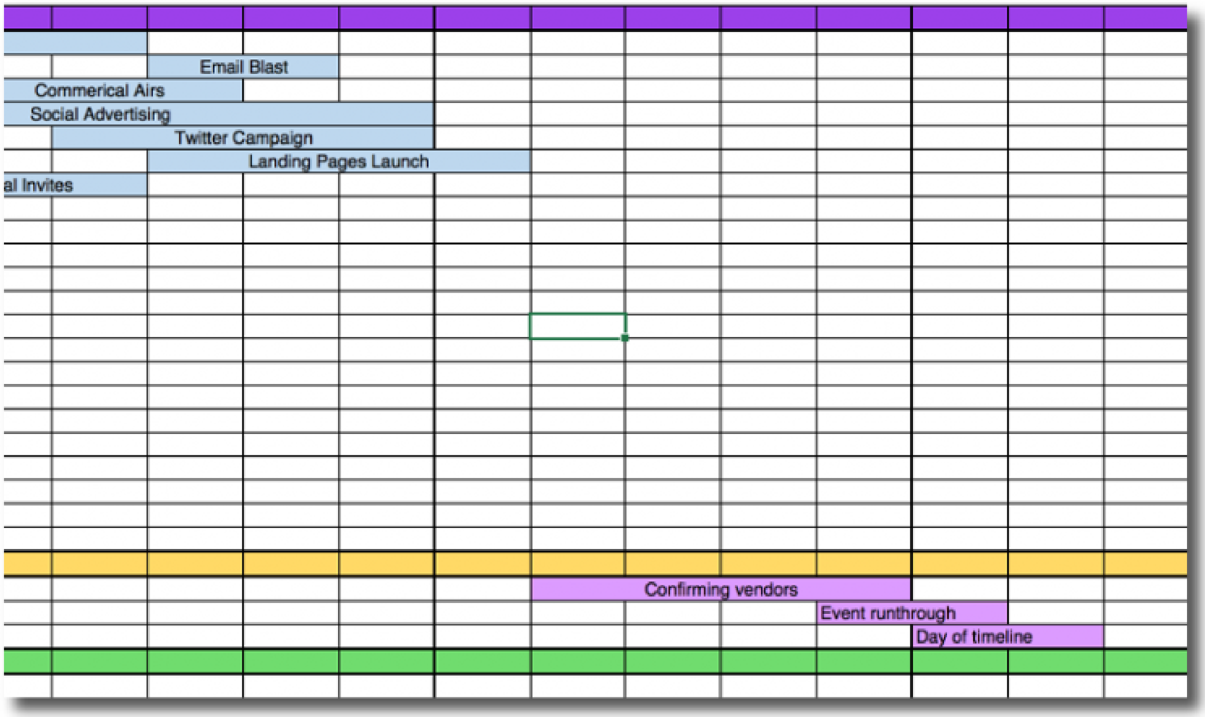
You can add or remove rows from this section of your template based on the number of promotions your team needs to run.

Final Preparations

The next phase of your event planning is going to be final preparations. These are the last things that your event planning team will need to take care of before the actual event takes place. It should include things like:

- **Confirming your vendors.** Is everyone that you paid to help complete your event going to show up?
- **On-site run through (if needed).** Do you have a significant change or part of your event that needs to be practiced in the space beforehand?
- **Creating your day of event timeline.** Create a timed list of who needs to be doing what and when.

Add each of these on to your template.



Post Event

The last thing you need to take care of is your post-event debrief and cost comparison.

Your debrief should include the entire team and cover what did and didn't go well and things you can learn from this recent event planning experience.

Your cost comparison should be a brief review of the budget you had vs. the money you spent. If you went over budget use this time to figure out why.

Record the days those meetings will take place in your template, and you're done.

How To Plan Everything With CoSchedule

Now you know how to plan your entire marketing strategy into a marketing timeline. However, there is one big problem.

These spreadsheets are all pretty static. What happens if an event moves? You have to copy and paste everything into your timeline.

Which could lead to mistakes.

And missed deadlines.

And generally, make a mess of things.

What if there was a way to make it easier? A simple drag and drop calendar that could act as your marketing calendar **and** your marketing timeline?

That's where CoSchedule comes in. Our marketing calendar will allow you to plan everything you need to complete your entire marketing timeline all in one place.

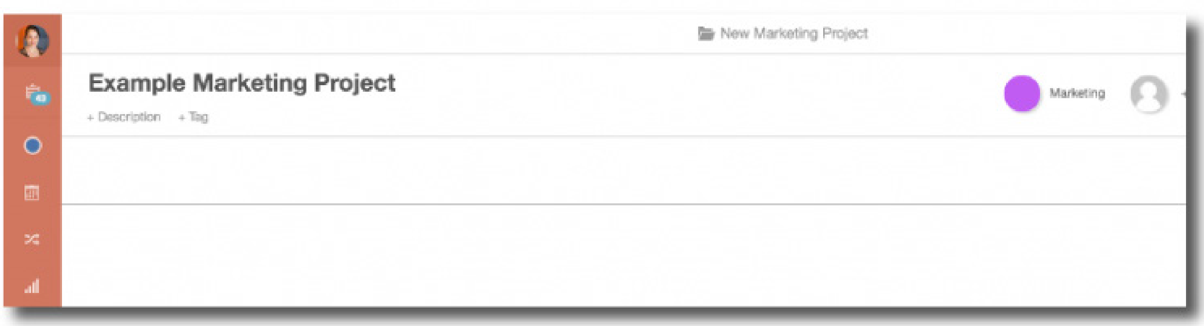
How?

With [Marketing Campaigns](#) **in CoSchedule.**

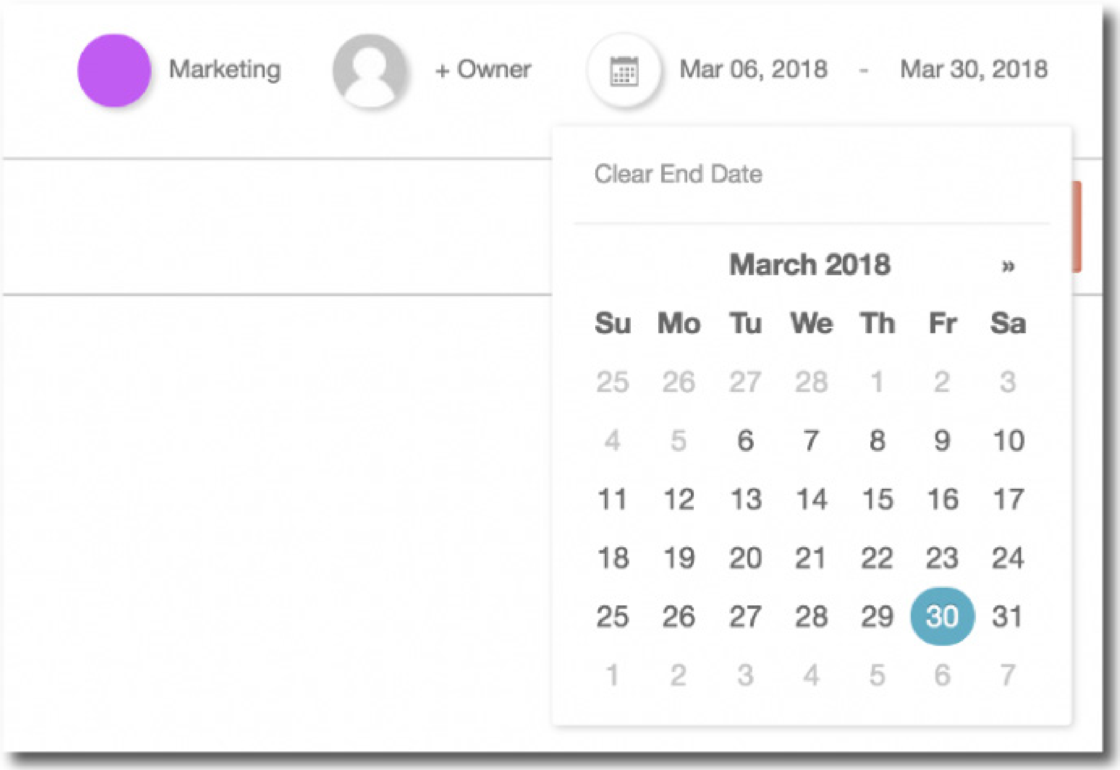
Marketing Campaigns was designed to keep projects and campaigns neatly organized.

So how does this all work?

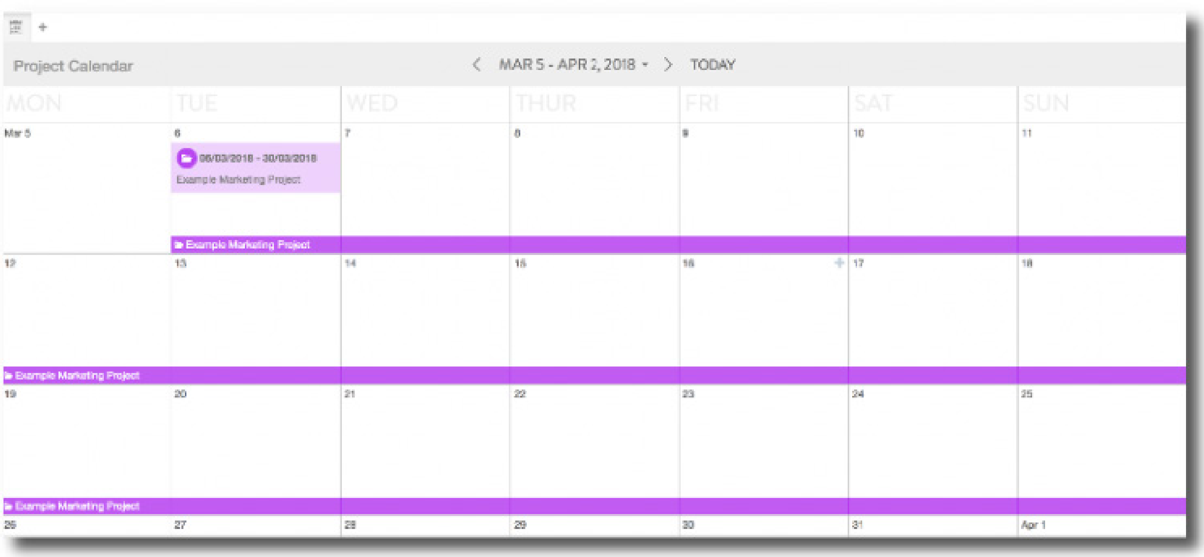
Go to your calendar select **Marketing Campaigns** from the menu, and title your project.



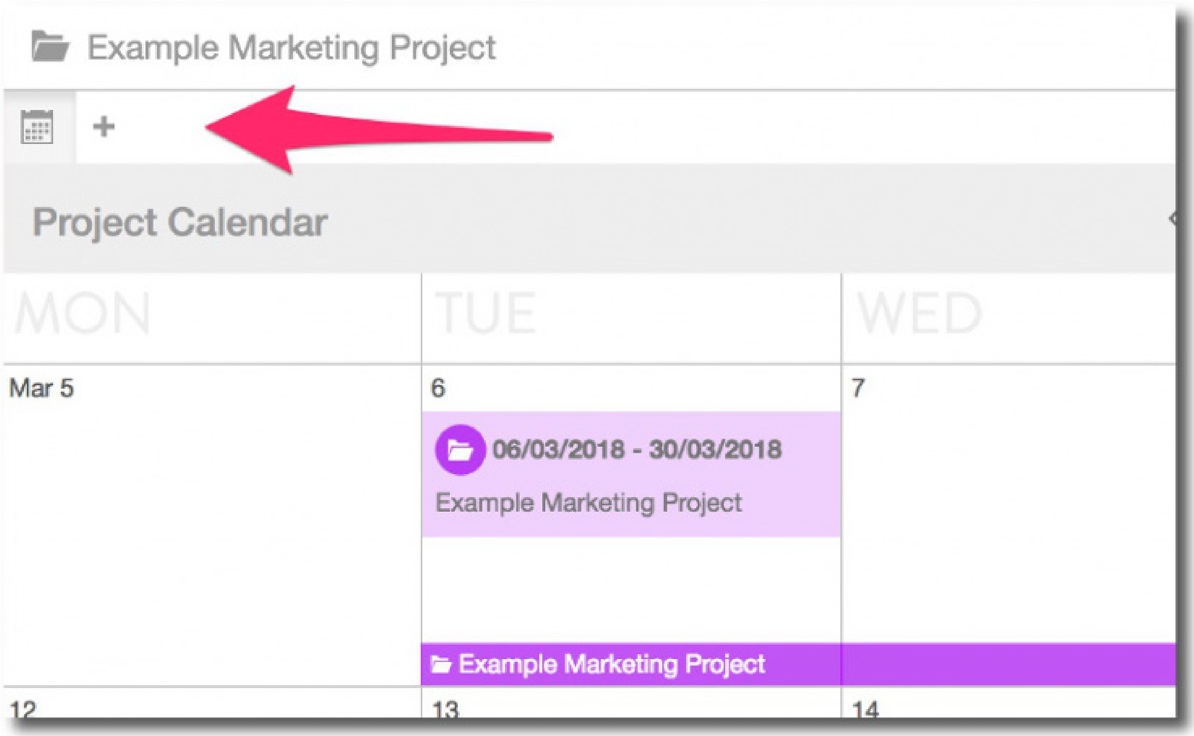
Select the start and end date of your project and click Create.



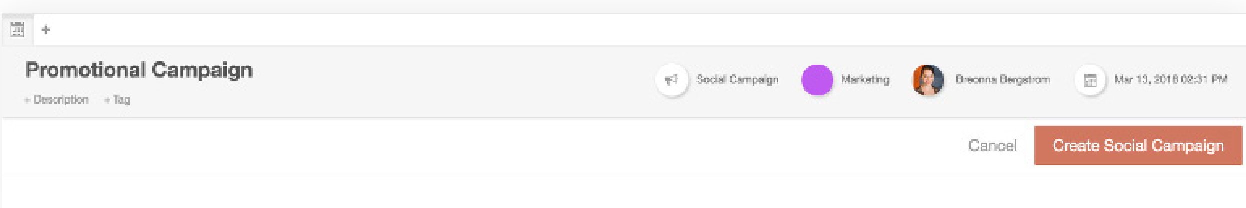
From there a new window will appear giving you a one on one view of your project.



You can add in the different parts your project by clicking the + arrow in the upper left-hand corner.

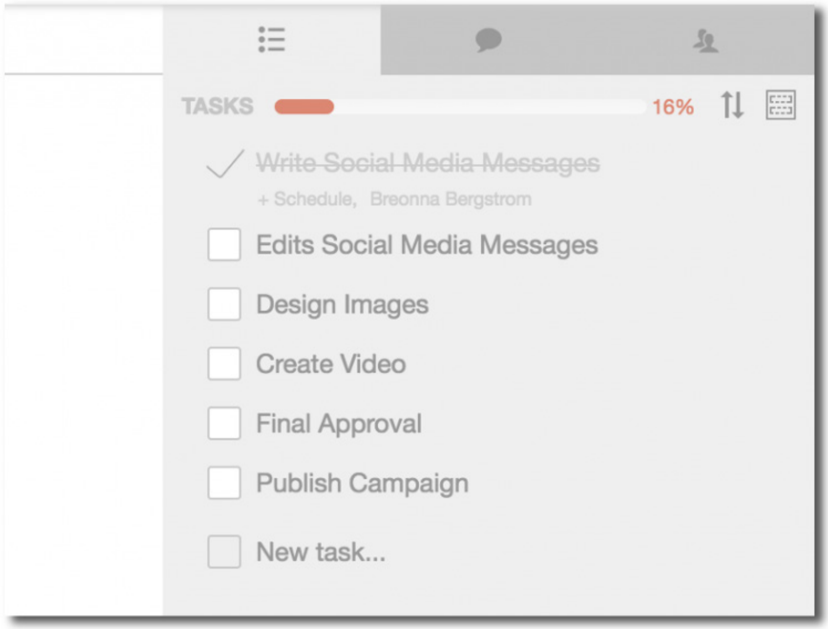


So for example, let's say we need to add a social media campaign to our project. We'd simply click the arrow and select Social Campaign from the content menu. Remember to title your promotional pieces so you can keep track of them all.

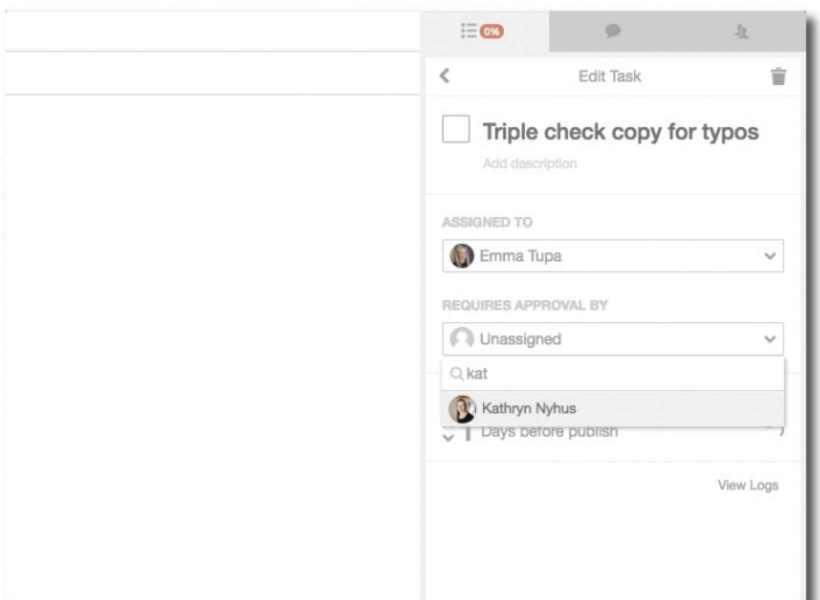


You can also change the color of each of these additional items, so you have a more organized view.

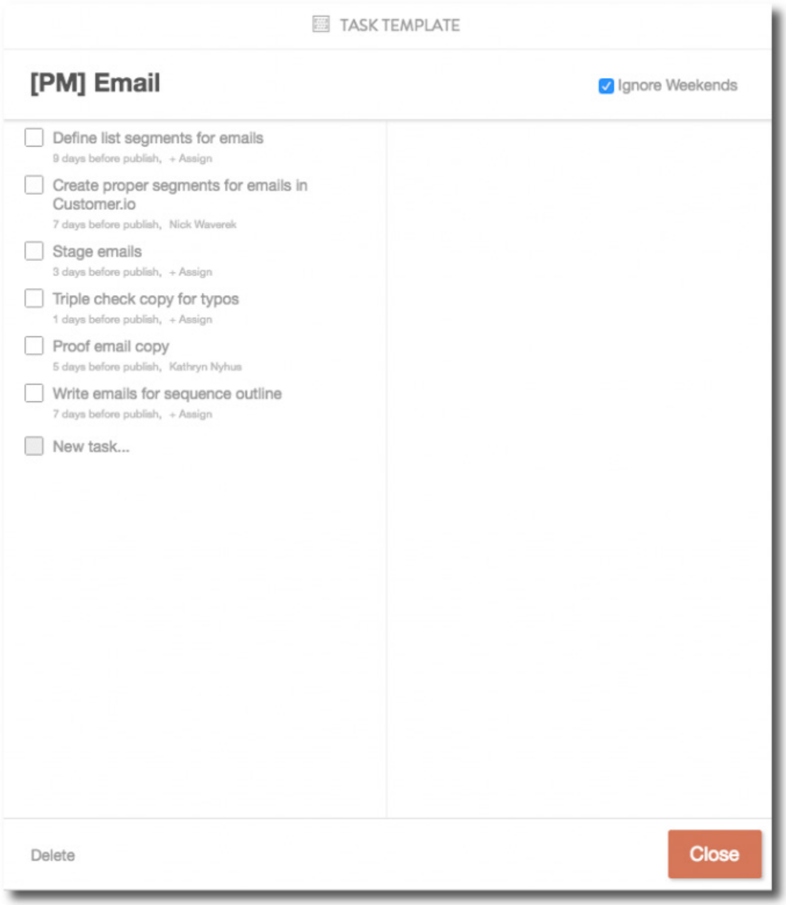
Finally, you can assign tasks to the members of your project by adding them to the task section of each of your content pieces.



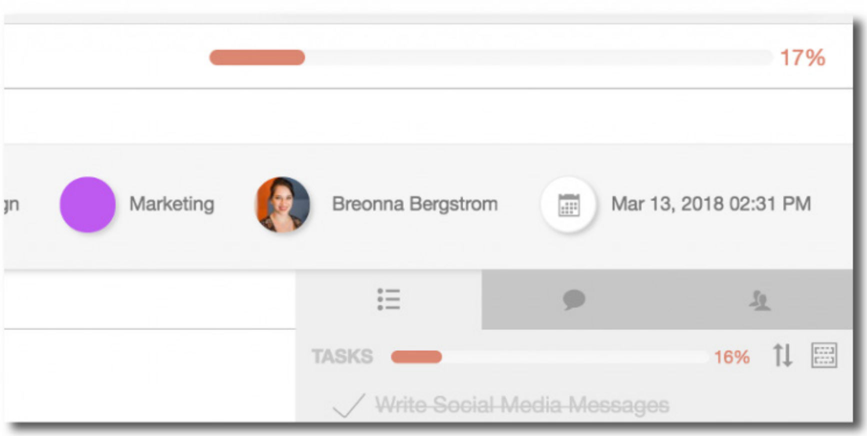
You can assign deadlines, team members and set approval steps for every task.



If you have a series of repetitive tasks that is continuously being assigned in your projects, make it easier on yourself by creating a Task Template that you can apply to a piece of content whenever you want.



The more tasks you check off on each of your content pieces, the more the progress bar in your Marketing Campaign will move.



The more content pieces and people you add to your project the more the calendar will expand.

As you can see, CoSchedule makes it easy to transfer your timeline from a static sheet to a responsive calendar. Sign up for a two-week trial or schedule a demo to see what else CoSchedule can do for your team.

Go Create Your Entire Marketing Timeline With Ease

You have your templates. You have your timeline. Now plan your entire marketing strategy with ease knowing that you'll be able to kick off your next project without missing a beat.

CHAPTER 13

How to Create Effective Marketing Project Checklists

Checklists are great tools for planning marketing projects.

In this chapter, you'll learn how to build project checklists and timelines in your sprint backlog.

If your marketing timeline includes your high-level deadlines, this chapter deals with individual project-level planning on a more granular level.

What Is A Marketing Project Checklist?

> *A marketing project checklist maps the creation process for all of the content within a single campaign over a specific period of time.*

The purpose of a marketing project timeline is to understand when to start working on a specific campaign to realistically set + achieve your deadlines.

This process also helps you understand all of the efforts going on throughout your marketing team to help you realistically understand when your resources are able to execute specific phases of content development.

Create Your Marketing Project Outline

You defined your highest priority marketing project idea in Chapter 7 of this marketing strategy guide. The point of the Content + Promotion Checklist is to break down one project into all of the pieces of content you'll create.

For example, if CoSchedule's highest priority project is an educational course, our team may need to create the following content to make sure the project successfully influences our marketing goals:

- **Launch brief + talking points:** An internal document that explains the goal, target audience, what the project is, and how you'll market the campaign.
- **Brand brief:** Since you're creating multiple pieces, your designers may need a way to make sure the visual identity of the campaign is consistent.
- **Signup landing page:** This is the page where you'll direct all promotional traffic.
- **Lesson pages:** These are the actual course material, and there will likely be multiple of them to create.
- **Lesson videos:** Some courses opt for visual content to include on every lesson page.
- **Lesson quizzes:** True courses teach, so you may want to quiz or test your students on every lesson page.
- **Workshops:** Most courses have some live action training that would include speaking points and a deck, like a webinar.
- **Certificates:** You may consider creating certificates for the students who pass all quizzes.
- **Facebook group:** This provides a way for students to collaborate and build community around your brand.
- **Emails:** You will promote the course to your email list. This will likely be more than one email to plan, write, and schedule.
- **Social media campaign:** You will share the course with all of your social media followers.
- **Facebook ads:** This is a way to reach a larger audience than those who already follow you.

^^^ In this example, you see how a large project breaks down into many pieces of content.

You will do the same thing for your highest priority project.

Open the Content + Promotion Checklist tab in your marketing strategy template spreadsheet.

	A	B	C	D
1		**Marketing Project Name**		
2		**Team**	**Completed**	**Progress Notes**
3	**Project/Campaign Content**	*Who is involved?*	*Y / N*	*How close is this to complete?*
4	**Project Prep**			
5	Talking Points/Theme/Launch Brief			
6	Promotion Checklist			
7	Team Huddle			
8	Branding/Design			
9				
10	**Pre-Promotion**			
11	Landing Page			
12	Blog Post			
13	Emails			
14	Social Campaign			
15	Video			
16	Facebook Ads			
17	AdWords			
18	Newsletter			
19				
20	**Launch**			
21	Landing Page			
22	Blog Post (Promoting Project)			
23	Blog Post (Teaching How To Do Project Yourself)			
24	Social Campaign			
25	Webinar/Workshop			
26	Demo			
27	Facebook Group/Engagement			
28	Video			
29	Press Coverage			
30	Resource Library			
31	Email			
32	Newsletter			
33				
34	**Post Launch**			
35	Emails/Automation			
36	Landing Page			
37	Survey			
38				

Column A already has some content ideas listed to help you kick start your campaign planning process. Tweak as you see fit and add your own content ideas.

You'll note column A is split into four distinct sections: Project Prep, Pre-Promotion, Launch, and Post Launch. Oftentimes, this helps with project timeline management because you know which pieces need to be completed before others. Again, if you find these categories aren't applicable to your project, tweak the template as you see fit.

Add your content ideas to column A. In column B, write the Team members' names who will help you execute each specific piece of content.

Nearly any piece of content undergoes four phases during its development process:

- Write
- Design

- Code/prep for publish
- Promote

Think through the names of the team members who will complete each phase of the content development process to include in column B.

For example, this is who CoSchedule may need to involve to create the signup landing page of our educational course (just one piece of content in a much larger campaign):

- **Write landing page:** Emma Tupa, conversion copywriter
- **Design landing page:** Megan Otto, web designer/developer
- **Code/prep for publish:** Megan Otto, web designer/developer
- **Promote on social media:** Leah Schothorst, social media strategist, and Ashton Hauff, graphic designer
- **Promote via email:** Ben Sailer, blog manager
- **Promote via Facebook ads:** Rachel Wiinanen, inbound marketer, and Ashton Hauff, graphic designer
- **Promote via blog post:** Jordan Loftis, content marketing strategist, Ashton Hauff, graphic designer, and Ben Sailer, blog manager

This process will help you understand the level of effort into each piece + be able to map the project timeline so no one person is overwhelmed with too much on their plate at any given time.

Map Your Content Development Process In Your Sprint Backlog

Now you'll break down each piece of content into a phased development timeline.

Open the Sprint Backlog tab in your marketing strategy template spreadsheet.

In column A, write the name of your project. In column B, write the list of all the content you'll create for that project. This is essentially the same list as your Content + Promotion Checklist.

Now for each piece, you can map when specific phases of content development will take place. Going back to CoSchedule's landing page example, the timeline to create that single piece of content within the campaign may look like this:

Sprint	Content	2018/01/01-05	2018/01/08-12	2018/01/15-19	2018/01/22-26
Week Dates					
Educational Course	Landing Page	Write landing page	Design wireframe	Code/prep for publish	
			Design social media graphics	Write social media messages	Promote on social media
			Design Facebook ads	Write Facebook ads	Launch Facebook ads
				Write emails	Send emails
		Write blog post	Design blog post	Code/prep for publish	
Emma Tupa					
Megan Otto					
Leah Schothorst					
Ashton Hauff					
Ben Sailer					
Rachel Wiinanen					
Jordan Loftis					

Follow the same process for each piece of content within your marketing project. As you add more content, your sprint backlog becomes your comprehensive marketing project timeline.

Here's what the project timeline example looks like for a single piece as we add more content into CoSchedule's educational course:

Sprint	Content	2018/01/01-05	2018/01/08-12	2018/01/15-19	2018/01/22-26	2018/01/29-02/02
Week Dates						
Educational Course	Landing Page	Write landing page	Design wireframe	Code/prep for publish		
			Design social media graphics	Write social media messages	Promote on social media	
			Design Facebook ads	Write Facebook ads	Launch Facebook ads	
				Write emails	Send emails	
		Write blog post	Design blog post	Code/prep for publish		
	Content Example 1		Write	Design	Code/prep for publish	Promote
	Content Example 2			Write	Design	Code/prep for publish
	Content Example 3				Write	Design
	Content Example 4					Write
	Content Example 5					
	Content Example 6					
Emma Tupa						
Megan Otto						
Leah Schothorst						
Ashton Hauff						
Ben Sailer						
Rachel Wiinanen						
Jordan Loftis						

Note that you can plan multiple sprints for multiple projects in the same Sprint Backlog tab in your marketing strategy template spreadsheet.

In this example, CoSchedule would simply write our second highest priority project idea in cell A15, then list our content involved in that project starting in B15. From there, we'd map our project timeline following the same process we used from the first campaign.

Congrats! You've planned your first project (or two!) and are ready to execute! Continue to learn how to organize your marketing management for efficient project execution.

How to Organize Your Marketing Management Process

What Is Marketing Management?

> *Marketing management is the process of efficiently executing the tactics and projects as planned in your marketing strategy to effectively influence your marketing goals.*

Manage Every Project With Your Marketing Calendar

Your marketing calendar is the tool where you'll organize the publish dates for every piece of content for every project. In this sense, it's the version of truth—the one place to see everything your marketing team is working on.

You learned how to map out a project timeline in Chapter 9. Now it's time to translate that timeline into clearly defined publish dates for each piece of content.

In that example, we planned the landing page for CoSchedule's educational course.

	A	B	C	D	E	F	G
1		Marketing Sprint Backlog					
2	Sprint	Content	2018/01/01-05	2018/01/08-12	2018/01/15-19	2018/01/22-26	2018/01/29-02/02
3	Week Dates						
4			Write landing page	Design wireframe	Code/prep for publish		
5				Design social media graphics	Write social media messages	Promote on social media	
6		Landing Page		Design Facebook ads	Write Facebook ads	Launch Facebook ads	
7					Write emails	Send emails	
8			Write blog post	Design blog post	Code/prep for publish		
9	Educational Course	Content Example 1		Write	Design	Code/prep for publish	Promote
10		Content Example 2			Write	Design	Code/prep for publish
11		Content Example 3				Write	Design
12		Content Example 4					Write
13		Content Example 5					
14		Content Example 6					
15							
16							
17							
18							
19							
20							
21							
22							
23							
24	Emma Tupa						
25	Megan Otto						
26	Leah Schothorst						
27	Ashton Hauff						
28	Ben Sailer						
29	Rachel Wiinanen						
30	Jordan Loftis						

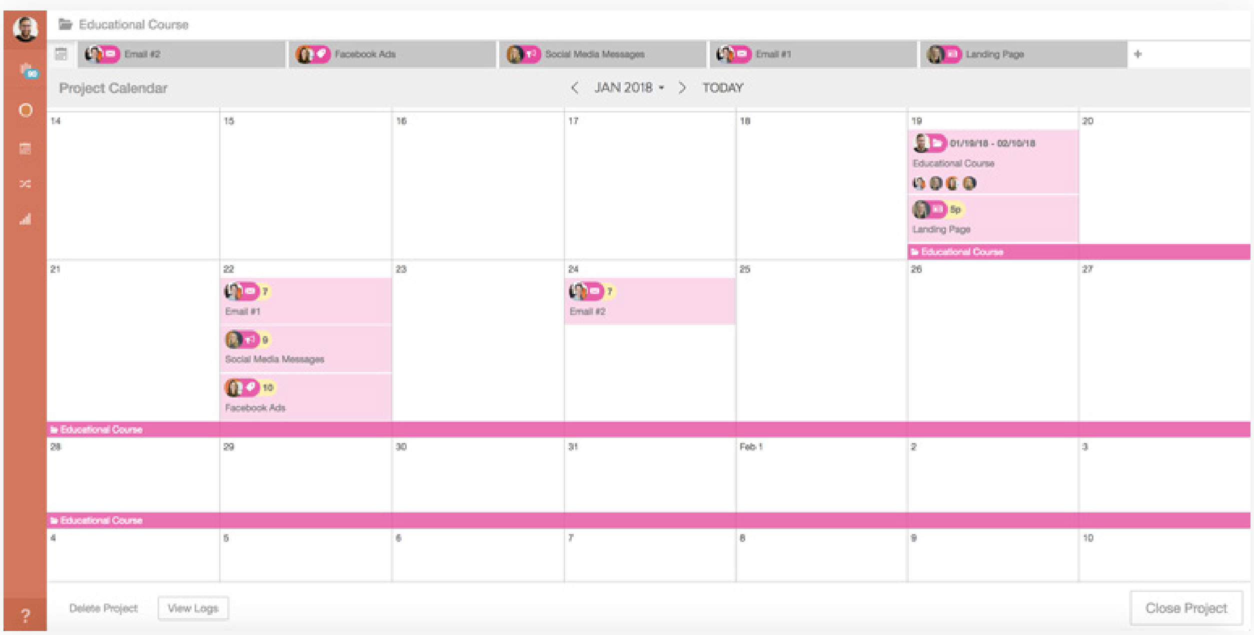
This project timeline example suggests the landing page will be ready to publish by the end of the week of January 15-19. So we can plan the landing page to publish Friday, January 19.

From here, we can review of the elements surrounding the promotion of the landing page, which include social media messages, Facebook ads, emails, and a blog post.

The landing page's project timeline suggests:

- **The social media messages** will launch the week of January 22-26. Since everything is designed and written by this point, we can set the social media campaign launch date as Monday, January 22.
- **The Facebook ads** will also launch the week of January 22-26. Since the graphics are already designed and the ad copy is already written, we can opt to launch the Facebook ads Monday, January 22, as well.
- Like the social media messages and Facebook ads, **the emails** will also be written and ready to publish by the week of January 22-26. Since we wrote two, we can schedule them to send Monday, January 22, and Wednesday, January 24.

So you see from that example how you'll set your deadlines (aka publish dates). This is what that example looks like visually with CoSchedule's marketing calendar:



The framework here is to use the high-level understanding of when a piece will be 100% complete (gained from the sprint backlog exercise in Chapter 9) to determine hard publish dates to your content.

Define Your Marketing Workflows

Now you need a way to break the phases of content development for each piece into clear tasks you'll delegate to the team members who'll execute the work.

Use the following framework to define a workflow for a single piece of content. You'll repeat the process for each content type you've chosen to execute within your campaigns.

1. Write Down Every Task That Needs To Be Done

Map the flow chart of the complete content creation process. Don't omit a single task.

At this point, you're looking to understand everything you'd typically do to publish a specific piece of content.

Former Intel CEO and chairman, Andrew S. Grove, writes in his book High Output Management that in order to boost efficiencies in your workflow, you need to understand your existing process:

> *"...you first need to create a flow chart of the production process as it exists. Every single step must be shown on it; no step should be omitted in order to pretty things up on paper."*

So write everything down.

For example, let's say CoSchedule wants to create a workflow for the landing page planned as part of the educational course. It might look something like this to begin with:

Write down *every* step in your workflow in chronological order.

- [ ] Confirm it's a 10x idea
- [ ] Approve idea
- [ ] Find keywords
- [ ] Define angle
- [ ] Write WIIFM and outline
- [ ] Write 20-30 headlines
- [ ] Peer review outline
- [ ] Write landing page
- [ ] Proof read landing page
- [ ] Optimize for search engines
- [ ] Approve landing page writing
- [ ] Write social messages
- [ ] Write Facebook ads
- [ ] Write blog post
- [ ] Design landing page wireframe
- [ ] Design landing page header graphic
- [ ] Design landing page body content graphics
- [ ] Design social media graphics
- [ ] Design Facebook ads
- [ ] Design blog post header graphic
- [ ] Design blog post body graphics
- [ ] Approve landing page wireframe
- [ ] Approve landing page header graphic
- [ ] Approve landing page body content graphics
- [ ] Approve social media graphics
- [ ] Approve Facebook ads
- [ ] Approve blog post header graphic
- [ ] Approve blog post body graphics
- [ ] Code landing page
- [ ] Insert graphics into landing page
- [ ] Insert graphics into social helpers
- [ ] Schedule social template
- [ ] Schedule landing page to publish
- [ ] Email audience

Write down every task in your process as it exists today.

2. Remove Unnecessary Tasks From Your List

Andrew S. Grove also writes in High Output Management:

"Second, count the number of steps in the flow chart so that you know how many you started with. Third, set a rough target for reduction of the number of steps. In the first round of simplification, our experience shows that you can reasonably expect a 30 to 50 percent reduction.

To implement the actual simplification, you must question why each step is performed. Typically, you will find that many steps exist in your work flow for no good reason. Often they are there by tradition or because formal procedure ordains it, and nothing practical requires their inclusion."

To summarize, you're looking to reduce the number of tasks in your current process that:

1. **Are actually part of other workflows.** These are tasks that likely complement different content, and therefore, don't need to be managed as part of the workflow you're creating at this moment.
2. **Are no longer necessary.** For example, sometimes tasks exist in new workflows to serve as reminders, but after time, your team learns the process so well that these reminders aren't needed.
3. **Exist because of unnecessary approval processes or office bureaucracy.** Create the workflow, approve the workflow, work the workflow. Eliminate lengthy back-and-forth approvals by planning your work, then working your plan.

For CoSchedule's landing page example, we set a task reduction target of 20 tasks (and actually found 21 opportunities to remove):

Remove unnecessary steps from your workflow.

- [ ] Confirm it's a 10x idea
- [ ] Approve idea
- [ ] Find keywords
- [ ] Define angle
- [ ] Write WIIFM and outline
- [ ] Write 20-30 headlines
- [ ] Peer review outline
- [ ] Write landing page
- [ ] Proof read landing page
- [ ] Optimize for search engines
- [ ] Approve landing page writing
- [ ] Write social messages
- [ ] Write Facebook ads
- [ ] Write blog post
- [ ] Design landing page wireframe
- [ ] Design landing page header graphic
- [ ] Design landing page body content graphics
- [ ] Design social media graphics
- [ ] Design Facebook ads
- [ ] Design blog post header graphic
- [ ] Design blog post body graphics
- [ ] Approve landing page wireframe
- [ ] Approve landing page header graphic
- [ ] Approve landing page body content graphics
- [ ] Approve social media graphics
- [ ] Approve Facebook ads
- [ ] Approve blog post header graphic
- [ ] Approve blog post body graphics
- [ ] Code landing page
- [ ] Insert graphics into landing page
- [ ] Insert graphics into social helpers
- [ ] Schedule social template
- [ ] Schedule landing page to publish
- [ ] Email audience

In this example, we're able to alleviate 62% of the workload by strategically removing tasks that are part of other workflows, don't need to be completed, or exist for unnecessary approval processes.

Target a specific number of tasks to remove from your process, then review your existing workflow and identify those productivity improvement opportunities.

3. Combine Similar Tasks Together

There are probably opportunities to batch tasks that happen in conjunction with each other.

This exercise will increase your team members' productivity by helping them knock out all of the similar tasks in one fell swoop.

To continue the landing page example, this is what the final consolidated workflow looks like:

Consolidate your tasks.

- [ ] Find keywords
- [ ] Define angle
- [ ] Write WIIFM and outline
- [ ] Write 20-30 headlines + body + proof read
- [ ] Optimize for search engines
- [ ] Design landing page wireframe + graphics
- [ ] Code landing page + insert content
- [ ] Schedule landing page to publish

We consolidated eight tasks into three, bringing the total down from 43 originally to a final total workflow task count of eight:

- 3 into 1: Write headlines + body + proofread
- 3 into 1: Design landing page wireframe + graphics
- 2 into 1: Code landing page + insert content

Batch similar tasks within your workflow together to increase your team members' productivity.

4. Choose One Person To Complete Each Task

You already know at a general high level which team members need to be involved in specific phases of content development.

At this point, you're looking for the names of those who will execute specific tasks.

In general, it's best practice to assign one task to a single team member. The moment you assign a single task to more than one person, is the moment each of those people think someone else is completing the work. Accountability works best when targeted at a specific team member.

This is who will complete the work for CoSchedule's landing page example:

Choose who will complete each specific task within your workflow.

- [ ] Find keywords (Ben Sailer, blog manager)
- [ ] Define angle (Emma Tupa, conversion copywriter)
- [ ] Write WIIFM and outline (Emma Tupa, conversion copywriter)
- [ ] Write 20-30 headlines + body + proof read (Emma Tupa, conversion copywriter)
- [ ] Optimize for search engines (Ben Sailer, blog manager)
- [ ] Design landing page wireframe + graphics (Megan Otto, web development designer)
- [ ] Code landing page + insert content (Megan Otto, web development designer)
- [ ] Schedule landing page to publish (Megan Otto, web development designer)

Choose who will complete each task within your workflow.

5. Determine When Each Task Should Be Done

Generally speaking, it's easiest to think about task due dates in terms of: **# days before publish**

Begin by defining the due date for the last task in your workflow. This way, you know exactly when the entire piece of content will be 100% complete.

From there, work backward up the list, assigning due dates to the second to last task, third to last, and so forth.

When you're done, you'll know exactly when the first task in your needs to be complete. Armed with this knowledge, you can start working through the piece with a realistic timeline to complete the work by your anticipated publish date.

This is what the exercise looks like applied to CoSchedule's landing page example:

Determine how many days before publish each task must be completed.

- [ ] Find keywords (Ben Sailer, blog manager)
    - 18 days before publish
- [ ] Define angle (Emma Tupa, conversion copywriter)
    - 17 days before publish
- [ ] Write WIIFM and outline (Emma Tupa, conversion copywriter)
    - 17 days before publish
- [ ] Write 20-30 headlines + body + proof read (Emma Tupa, conversion copywriter)
    - 15 days before publish
- [ ] Optimize for search engines (Ben Sailer, blog manager)
    - 14 days before publish
- [ ] Design landing page wireframe + graphics (Megan Otto, web development designer)
    - 7 days before publish
- [ ] Code landing page + insert content (Megan Otto, web development designer)
    - 2 days before publish
- [ ] Schedule landing page to publish (Megan Otto, web development designer)
    - 1 day before publish

You can use the high-level phases of content development you planned in your sprint backlog to help you understand what tasks need to be completed in certain weeks, too, to help you understand when each task should be complete.

For example, when we apply the landing page workflow to the specific educational course signup page example, these are the due dates for the tasks:

TASKS 0%

- [ ] Find keywords
  Monday Jan 1, Ben Sailer
- [ ] Define angle
  Tuesday Jan 2, Emma Tupa
- [ ] Write WIIFM and outline
  Tuesday Jan 2, Emma Tupa
- [ ] Write 20-30 headlines + body + proof read
  Thursday Jan 4, Emma Tupa
- [ ] Optimize for search engines
  Friday Jan 5, Ben Sailer
- [ ] Design landing page wireframe + graphics
  Friday Jan 12, Megan Otto
- [ ] Code landing page + insert content
  Wednesday Jan 17, Megan Otto
- [ ] Schedule landing page to publish
  Thursday Jan 18, Megan Otto

Compare the task due dates to the phases of content development we planned in the sprint backlog:

	Marketing Sprint Backlog				
Sprint	Content	2018/01/01-05	2018/01/08-12	2018/01/15-19	2018/01/22-26
Week Dates					
Educational Course	Landing Page	Write landing page	Design wireframe	Code/prep for publish	
			Design social media graphics	Write social media messages	Promote on social media
			Design Facebook ads	Write Facebook ads	Launch Facebook ads
				Write emails	Send emails
		Write blog post	Design blog post	Code/prep for publish	
Emma Tupa					
Megan Otto					
Leah Schothorst					
Ashton Hauff					
Ben Sailer					
Rachel Wiinanen					
Jordan Loftis					

Note how the due dates for the tasks align perfectly with the phases of content development.

Assign due dates for your tasks in the form of # days before publish.

6. Delegate Tasks Efficiently

The final element of strategic marketing management involves communication. You've set up expectations of what the team will create, who will complete certain tasks, and when those tasks will be complete.

Now it's time to effectively communicate this to the team, which requires:

1. Notifying team members when you assign them a task. Let each person know what you expect them to do.
2. Communicating the due date for the task. Let them know when you expect them to complete the work.
3. Reminding them the day before the task is due. Proactively prevent delays by reminding those who haven't completed their tasks before they become overdue.

Enable easy collaboration with marketing management software designed to remove the tedious, manual busywork.

Hint: I'm talking about CoSchedule.

When you manage your content + campaigns with CoSchedule, you'll delegate these tasks effectively because CoSchedule automatically notifies, communicates, and reminds assignees to complete their work on time.

CoSchedule also helps you organize every marketing campaign + all of your content in one place. You'll see everything your team is working on to execute your marketing strategy more efficiently than ever.

Congrats! You've built your entire marketing strategy and know how you'll manage the work!

CHAPTER 15

How to Effectively Measure Marketing ROI With Google Analytics and a Simple Formula

Your team works incredibly hard producing content that should produce positive results for your company, one of them being growth for your bottom line.

But what good is all that work when you can't prove that what you're doing is actually having an effect on your ROI?

According to CMOSurvey.org, 37% of chief marketing officers feel confident they can prove their short-term ROI. That number drops to 31% when asked if they could prove-long term ROI.

So, what's the solution?

A marketing ROI formula that helps your team track costs and revenue generated from your projects and find a final ROI total.

When you read this blog, you'll learn how to:

- Find the amount of money it costs for your team to create a piece of content or campaign.
- Use Google Analytics to calculate the amount of profit that your content or campaign makes.
- Track and calculate your marketing costs versus profits with an Excel spreadsheet template to find your marketing ROI (MROI).

It's time to get started.

What Is Marketing ROI?

> *Marketing ROI is the measurable revenue generated as a result of marketing activity.*

A Few Quick Assumptions Before You Start

Marketing ROI can be difficult to discuss in generalities because each marketing strategy is different and therefore requires an adjustment in recording strategy.

For the sake of this blog post, here are the assumptions you need to know:

- Every customer conversion produces the same amount of revenue.
- You're publishing digital content, and you'll measure your conversions through this content with Google Analytics Goals and Custom Reports.
- If you are publishing printed content, it drives back to an online medium from which you can measure your success.

This is the marketing ROI formula you'll learn throughout this blog post: MROI = Revenue Generated From Content - Cost To Produce Content

If your team is operating outside these assumptions, you may need to adjust the formula in this post to fit your strategy specifically.

Find How Much Revenue a Page or Project Has Generated

The next step in finding your marketing ROI involves finding the amount of revenue your content generates.

This is a three-step process that helps your team track the content that is generating revenue. To find this out, open your Google Analytics account.

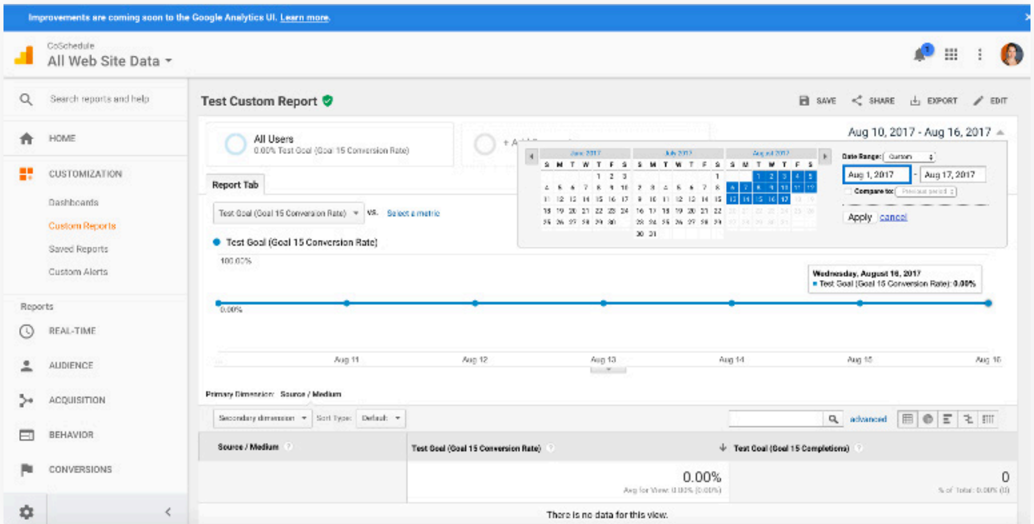
To start tracking your generated revenue, you first need to set up a Goal in your Google Analytics account as well as a custom report. Check out this video for ways to get started.

You'll notice in the video that the goal that was set up was a destination goal, meaning that when that web page is visited, Google counts it as a conversion.

Since it is assigned a value of $50, every time that URL surfaces, Google will add another $50 to your total revenue earned from the piece viewed immediately before the conversion.

In order to see that final total, you need to set up a Custom Report. This video shows you how to set one up.

The total that appears in the report is the total number of conversions and money that your content created. Depending on how long you want to track your conversions, you'll need to adjust the date at the top of the report:



It's important to note that you need to give each piece of content a fair chance to contribute to your team's total MROI. That means that there needs to be a trial period where you team tracks the total amount of revenue that a piece of content generates in one time frame.

This could be anything from a week to 30 days to 6 months, but once your team selects a trial period, it needs to apply to every piece of content.

In your marketing ROI template, enter in the total made and how long you tracked the number of conversions your content made:

Marketing ROI									
/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/ Cost per hour	Team Member/Cost per hour	Total Cost	Money made	Dates Campaign Ran	MROI
$16	Designer: 4hrs @$16	Design Editor: 2hrs @ $16	Developer: 3hrs @$16	Social Media Specialist: 2hrs @ $15	Ad Specialist 2hrs @ $15	$250			

Determine How Much Each Project Will Cost Your Company To Create

The first step in your MROI process is finding how much your intended project is going to cost your company.

Why is this important? Because in order to track your MROI accurately, you need to know the upfront costs first. How can you determine those costs?

First, pick your project and decide what your team needs to do in order to complete it.

For example, let's say your team is publishing an e-book. Begin by making a list of everything that needs to be completed by the team in order to publish it. That list would look like:

Each of these steps involve a member of your team whose time is worth a certain amount of money. So first you need to determine who on your team is filling each role. For this example, you will need:

- Writer
- Editor
- Designer
- Design editor
- Developer
- Social Media Specialist
- Ad Specialist

Then divide their yearly salary by 52. Divide that result by 40.

Price per hour = (Yearly salary / 52 weeks) / 40 hours per week.

So now you have the price per hour for each of your team members. The next thing you need to do is ask your team to estimate how long it will take them to complete their assigned tasks and record those hours.

For the example, let's say your team gave the following answers:

- Writer: 4 hours
- Editor: 2 hours
- Designer: 4 hours
- Design editor: 2 hours
- Developer: 3 hours
- Social Specialist: 2 hours
- Ad Specialist: 2 hours

Each hourly salary can then be added on to get your final cost total:

- Writer takes 4 hours at $15 per hour
- Editor 2 hours at $16 per hour
- Designer 4 hours at $16 dollars per hour
- Design editor 2 hours at $17 per hour
- Development 3 hours at $16 per hour
- Social Specialist 2 hours at $15 per hour
- Ad Specialist 2 hours at $15 per hour
- Grand Total: $250

Calculating Project Cost

Position	Estimated Project Time	Hourly Pay
Writer	4 hours	$ 15
Editor	2 hours	$ 16
Designer	4 hours	$ 16
Design Editor	2 hours	$ 17
Development	3 hours	$ 16
Social Specialist	2 hours	$ 15
Ad Speicialist	2 hours	$ 15
	TOTAL:	$298

CoSchedule

In the template you downloaded earlier, enter in each position that will contribute to your overall project, how many hours they spent working, and how much it cost per hour.

Marketing ROI

Project	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/ Cost per hour	Team Member/Cost per hour	Total Cost
1 Social Media e-Book	Writer: 4hrs @ $15	Editor: 2hrs @ $16	Designer: 4hrs @$16	Design Editor: 2hrs @ $16	Developer: 3hrs @$16	Social Media Specialist: 2hrs @ $15	Ad Specialist 2hrs @ $15	
2								
3								
4								
5								
6								

Calculate Your Marketing ROI

The final step of calculating your MROI is to use the following formula:

"Total Revenue Generated From Content - Total Cost To Produce Content = MROI"

For the example, your formula would look like:

"$1,000 (Total Profit) - $250 (Total Cost) = MROI of $750"

Your final MROI total can be entered into the last column of your MROI template:

Marketing ROI

r/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/Cost per hour	Team Member/ Cost per hour	Team Member/Cost per hour	Total Cost	Money made	Dates Campaign Ran	MROI
$16	Designer: 4hrs @$16	Design Editor: 2hrs @ $16	Developer: 3hrs @$16	Social Media Specialist: 2hrs @ $15	Ad Specialist 2hrs @ $15	$250	$1,000	August 1st - 17th	$750

Seems simple enough right? Some things that your team will need to think about or subtract from your final total:

- Marketing tool cost
- Overhead costs like:
    - Cost for customer service representatives
    - Costs to produce each product sold

Now it would make sense to think that if you avoid things like tools, you wouldn't have to take as much away from your total ROI right?

However, if your tools end up saving your team more time and allow them to get their work done faster, your initial team cost lowers dramatically.