antenna

a.
Better
Way

A guide to finding a better way to make marketing work.

We asked more than 150 marketing leaders about their biggest challenges, hopes and what they're excited about in the year ahead. We then synthesized the data, quotes and findings and created the 2021 Better Way Report. In this report, we outline six trends while offering our own tips alongside helpful methods.

In early 2020, marketers were ready to implement their yearly strategic goals. Fresh priorities, fresh calendars, fresh year. By April, most of those marketing plans and goals were scrapped. What was going to happen without in-person events, conferences, trade shows and ways to connect with each other?

The pandemic turned our personal and professional lives upside down. We were all being asked to do more work with less support, fewer team members and lower budgets. At home. Some with their kids. Some with roommates. Some solo.

It also served as a clear reminder of what we've always known; the only constant is change. Throughout change, we help companies find better ways to build the talent infrastructure they need to adapt and grow their business. Naturally

we were curious about what was and wasn't working for our marketing colleagues. What were people worrying about? Prioritizing? How were people working? What marketing trends were continuing to rise to the top? So we got to work.
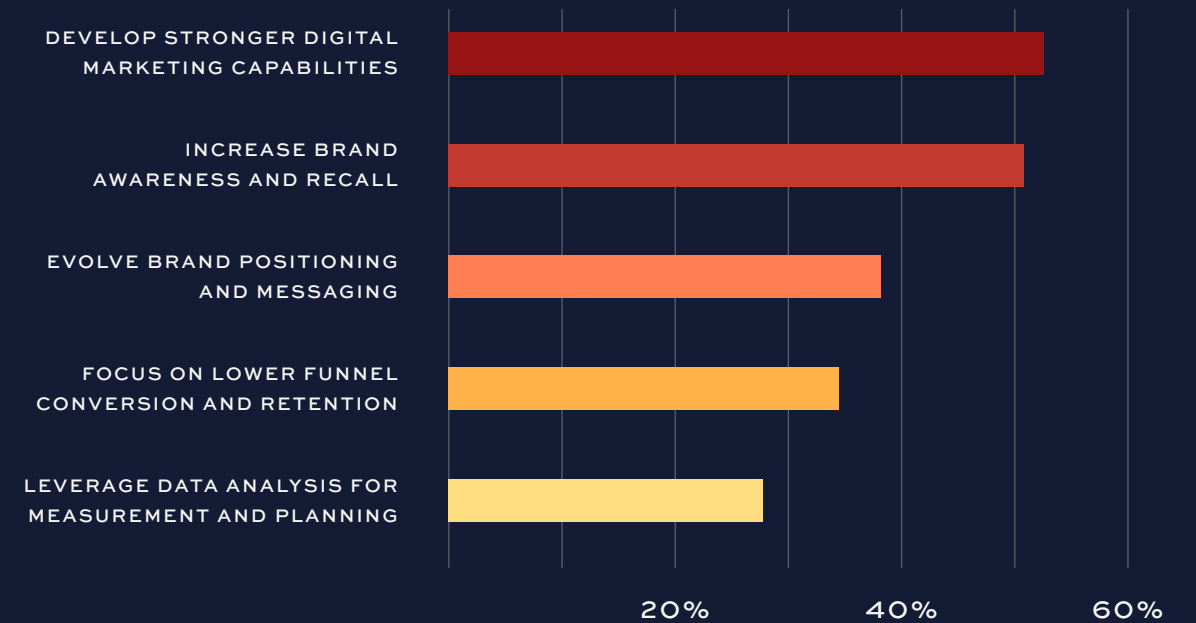
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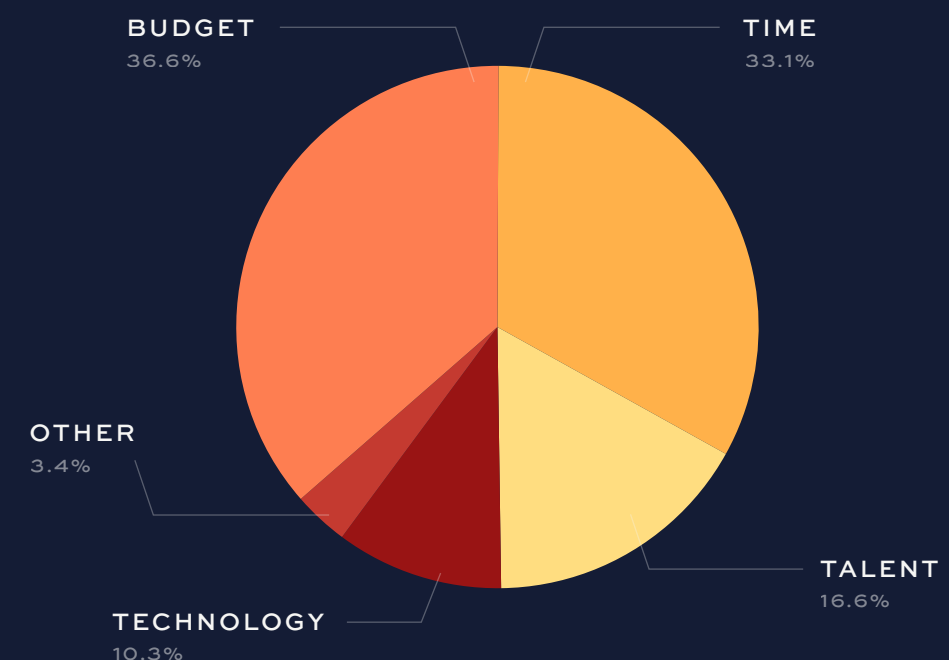
Here's to A Better Way

Jennifer Laible

JENNIFER LAIBLE
PRESIDENT, ANTENNA

2021 Marketing Priorities

DEVELOP STRONGER DIGITAL
MARKETING CAPABILITIES

INCREASE BRAND
AWARENESS AND RECALL

EVOLVE BRAND POSITIONING
AND MESSAGING

FOCUS ON LOWER FUNNEL
CONVERSION AND RETENTION

LEVERAGE DATA ANALYSIS FOR
MEASUREMENT AND PLANNING

20%   40%   60%

Barriers to Accomplishing Marketing Priorities

BUDGET
36.6%

TIME
33.1%

OTHER
3.4%

TALENT
16.6%

TECHNOLOGY
10.3%

"

Whenever you go through something like this with constrained resources, you push away the nice-to-haves and focus on what's going to make a difference. What do our customers most need? How do we get the information to them more readily and more efficiently?"

MARKETING VP AT A
FORTUNE 100 COMPANY

"

At the start of the year, there was renewed energy. But we were pretty quickly reminded that we are still living in a trepidatious world. It'd be great to lay out a strategic plan and have everything go according to that plan, but that hasn't happened. We need to continue to stay agile and pivot."

MARKETING VP AT A NATIONAL BANK

Contents

Methodology

We surveyed and interviewed more than 150 client-side marketing leaders in the Twin Cities, representing various company sizes and industries. We thank everyone who took the time to complete the survey. It helped us follow through on our promise to donate 150 meals to Second Harvest Heartland through our Good Works program.

Annual Revenue

- $1M - $49M — 23.4%
- > $5B — 18.6%
- < $1M — 13.8%
- $100M - $499M — 13.1%
- $50M - $99M — 12.4%

Industry

- MANUFACTURING
- HEALTHCARE
- FINANCIAL SERVICES
- COMPUTER SOFTWARE
- RETAIL / E-COMMERCE

3%   9%   15%
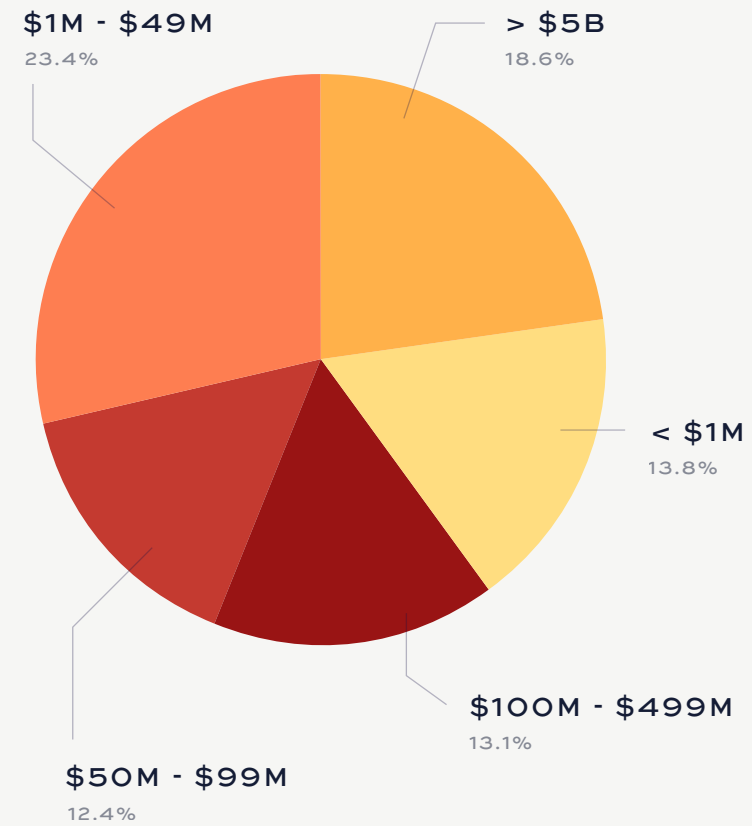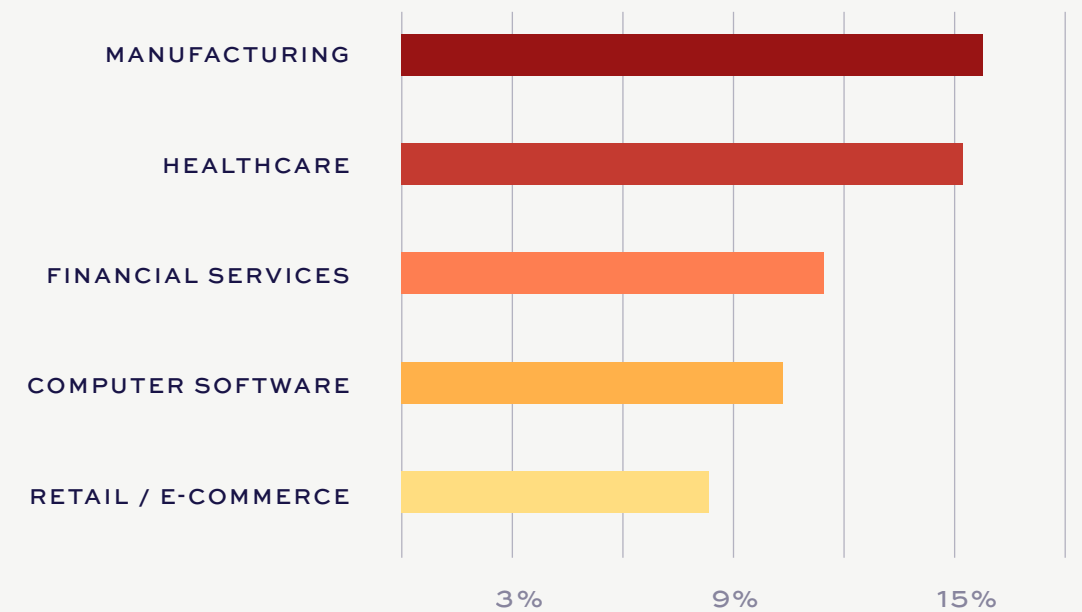
Marketing leaders are under tremendous pressure to grow their businesses with fewer resources, under more stress.

67.8%

of people will split their time between remote work and going into the office as needed in the future

" The biggest barrier to achieving our marketing goals in 2021 is budget constraints. There is uncertainty in the economy, especially in the healthcare industry. And, of course, headcounts go hand-in-hand with financial uncertainty."

MARKETING VP AT A FORTUNE 100 COMPANY

According to our research, marketing leaders' biggest challenges are budget restrictions, time restraints and talent gaps. While these challenges may not be entirely new, the significant impact of the pandemic has marketing leaders chasing revenue on slashed budgets, wading through phases of furloughs, new ways of working and societal unrest.

Welcome Software's research titled The Impact of Coronavirus on Marketing Teams states that the global crisis created a host of new challenges for marketing teams. 42% of their survey participants indicated their marketing team lacked the bandwidth to quickly create new content as the result of shifting priorities. Another 40% of their participants indicated that managing the realignment of their budget and talent resources was proving problematic.
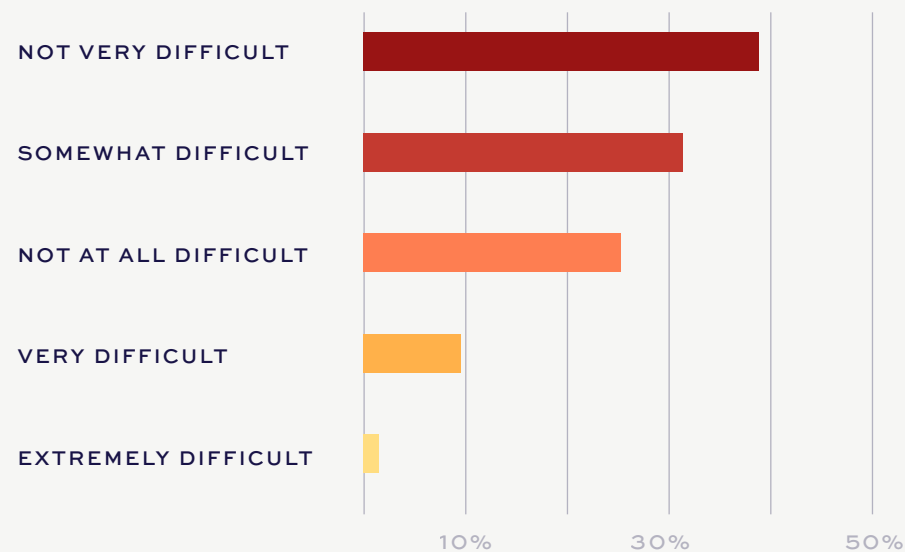
These findings were echoed in our survey. Numerous marketing leaders spoke about the additional internal pressure they were facing to grow the business and track marketing conversions in the face of very real resource restrictions like hiring freezes and budget cuts.

01

> ## "People are short-circuiting everywhere. The pandemic, work, family and politics. Everywhere you turn, it's so much and then you have work and - at times - it feels like you're navigating a no-win situation."

GLOBAL VICE PRESIDENT OF AN EDUCATION COMPANY

How difficult has it been for you to adjust to working during the pandemic?

NOT VERY DIFFICULT	
SOMEWHAT DIFFICULT	
NOT AT ALL DIFFICULT	
VERY DIFFICULT	
EXTREMELY DIFFICULT	

10%   30%   50%

TREND #1

A Better Way

Knowing the only constant is change, proactively build the planning and process infrastructure needed to infuse fluidity into your marketing approach. While a longer-term strategic plan is important, a short-term roadmap is critical to guiding immediate decisions. With frequent progress checkpoints, it also gives your team more opportunities to pivot, connect and reallocate budget, time and talent based on what you're seeing in the market and uncertainty ahead.

METHOD

The Marketing Matrix

The purpose of this method is to give marketing leaders a short-term planning framework that can be used to create a roadmap, prioritize for the quarter and develop an organized way to capture key insights for future planning efforts. This method works best with one facilitator and multiple people contributing.

● **STEP 1**

Based on your marketing objectives and strategies, spend 30 minutes discussing what your team wants to accomplish in the upcoming quarter. The facilitator captures each of these ideas in a place everyone can see. (Protip: **Mural** is one of our favorite online collaboration tools.)

● **STEP 2**

Create a simple matrix to evaluate and prioritize your ideas based on consumer desirability, business viability and technical feasibility. For each factor, rate the goal a 3 (low), 6 (medium) or 9 (high).

EXAMPLE:

GOAL	CONSUMER	BUSINESS	TECHNOLOGY	TOTAL
Product trial	3	9	3	15
Create app	6	3	3	12
Campaign	3	9	6	18
Automation	6	6	6	18
Analytics	3	9	3	15

In this case, the marketing team might decide to develop a campaign and marketing automation support for lead acquisition and nurture.

● **STEP 3**

Create a learning agenda that outlines the key questions you want to get answered, along with the KPIs used to measure effectiveness.

Here is a learning agenda template you can use, along with a few examples.

OBJECTIVE	QUESTIONS	ASSUMPTIONS	KPI(S)
Identify new marketing channels for growth	Is Instagram a viable channel to drive in-store revenue?	People only purchase through e-commerce on Instagram.	In-store traffic In-store sales E-commerce sales
Reposition brand to be more relevant to target audiences	What motivates people to engage with our brand?	Consumers care more about product attributes than what the brand stands for.	Social engagement Social following Email capture

Test and learn approach leads to marketing innovation.

"

Creating a strategy and seeing it through with any sort of confidence is the challenge we all have. We don't have the luxury of just repeating what worked in the past. We're now placing different bets and pivoting as we learn. The world just looks so different."

MARKETING VP AT A NATIONAL BANK

This year, we've seen fast-paced changes in consumer behavior. These shifts have compelled marketers to reevaluate the ways they connect with customers and implement new strategies. With new comes the unknown, which leads to uncertainty of impact, which isn't necessarily negative.

According to Christian Selchau-Hansen, CEO and Co-Founder of Formation, "Marketers must reinvent how they reach customers, breaking down silos and increasing agility and experimentation with fewer resources. The pandemic has pushed brands to ramp up their digital offerings overnight, and as consumers spend more time online, their expectations for relevance, value and frictionless online experiences have only grown."

Rather than view these changes as roadblocks, enduring marketers are embracing the unknown. They're leaning into the ambiguity and viewing it as an opportunity to innovate, experiment and learn new ways to evolve and sustainably grow.

02

Motivations and Barriers

The purpose of this method is to generate human-centered marketing solutions for consumers based on their motivations and barriers when it comes to purchasing your product or service.

● **STEP 1**

Brainstorm the motivations and barriers people might have when engaging with your brand, product or service. When you get stuck, consider all different types of people and different times of year/week/day.

EXAMPLE:

MOTIVATORS	BARRIERS
• Supporting the community • Good cause • Easy to donate • Can give any amount of $	• Already contributes to community in other ways • Doesn't have the money • Where does the $ go?

● **STEP 2**

Have your group decide on which 2-3 motivations or barriers you would like to focus on and then create **"How Might We" statements**, which will be used to guide the co-creation of ideas in the next step.

● **STEP 3**

For each "How Might We" statement, spend 15 minutes sketching as many solutions as possible. Once finished, the facilitator groups the ideas into themes and helps the team focus on where to take them next.

● **STEP 4**

Create a learning agenda (template included in trend #1) that outlines the key questions you want to get answered, along with the KPIs used to measure effectiveness.

TREND #2

A Better Way

Rather than defaulting to carrying forward what's worked before, start with the motivations and barriers of your potential customers and then workshop your way towards new experiences and tactics your brand has yet to try. From there, express diligence by developing learning agendas and more adaptable ways of marketing that will increase your chances of evolving from test and learn to tried and true.

Connecting the right marketing expertise to the right work at the right time is critical.

The importance of a flexible and adaptable approach to building marketing teams is critical and a never-ending challenge. Marketing leaders are constantly juggling a myriad of priorities and limitations while working to staff their teams to meet ever-changing workloads and deadlines.

From balancing specific expertise gaps to evaluating team bandwidth, there are endless elements that go into properly staffing a team's work and priorities. But which is the most important? Niche marketing expertise? Industry knowledge? Availability? Attitude?

According to the **Deloitte Insights: 2021 Marketing Trends Report**, "64% of marketing organizations have an in-house agency. Historically, many marketing departments have relied on external agency partners to execute their creative campaigns and other activities. However, even in the benchmarking study, we saw that 59% of marketing leaders still outsource their creative function while 31% do so for insights and analytics."

All of these factors prove to be challenging as marketing leaders manage internal marketing and external partners, juggle looming deadlines with tight budgets and keep their teams busy without burning them out. Striking a balance requires an informed and sophisticated approach to succeed.

"

When we create larger campaigns, we engage an agency."

MARKETING VP AT A FORTUNE 100 COMPANY

SURVEY DATA
A majority of survey respondents have worked with an ad agency or freelance creative, followed closely by independent consultants and consulting firms.

ADVERTISING AGENCIES
54.5%

FREELANCE CREATIVES
51.0%

INDEPENDENT CONSULTANTS
44.1%

CONSULTING FIRMS
42.1%

STAFFING FIRMS
29.0%

" We're in a hiring freeze so I have to explore different ways of staffing. My 2021 needs are quick and project-based. I need people who know how to lead campaign planning, find creative ways to execute them and work collaboratively to get them out the door. We have these people in-house now, but not *enough* of them."

GLOBAL VICE PRESIDENT OF AN EDUCATION COMPANY

03

Internal Resources vs. External Partners

The decision to look for an internal marketing resource or engage an external marketing partner depends on numerous factors. We asked survey respondents to rank the importance of these factors and here's what they said.

	INTERNAL	EXTERNAL
SIZE AND SCOPE OF PROJECT	1 2 3 4 5	1 2 3 4 5
SUBJECT MATTER EXPERTISE	1 2 3 4 5	1 2 3 4 5
INDUSTRY EXPERIENCE	1 2 3 4 5	1 2 3 4 5
GEOGRAPHIC PROXIMITY	1 2 3 4 5	1 2 3 4 5
DIGITAL COMPETENCY	1 2 3 4 5	1 2 3 4 5
BUDGET CONSIDERATIONS	1 2 3 4 5	1 2 3 4 5
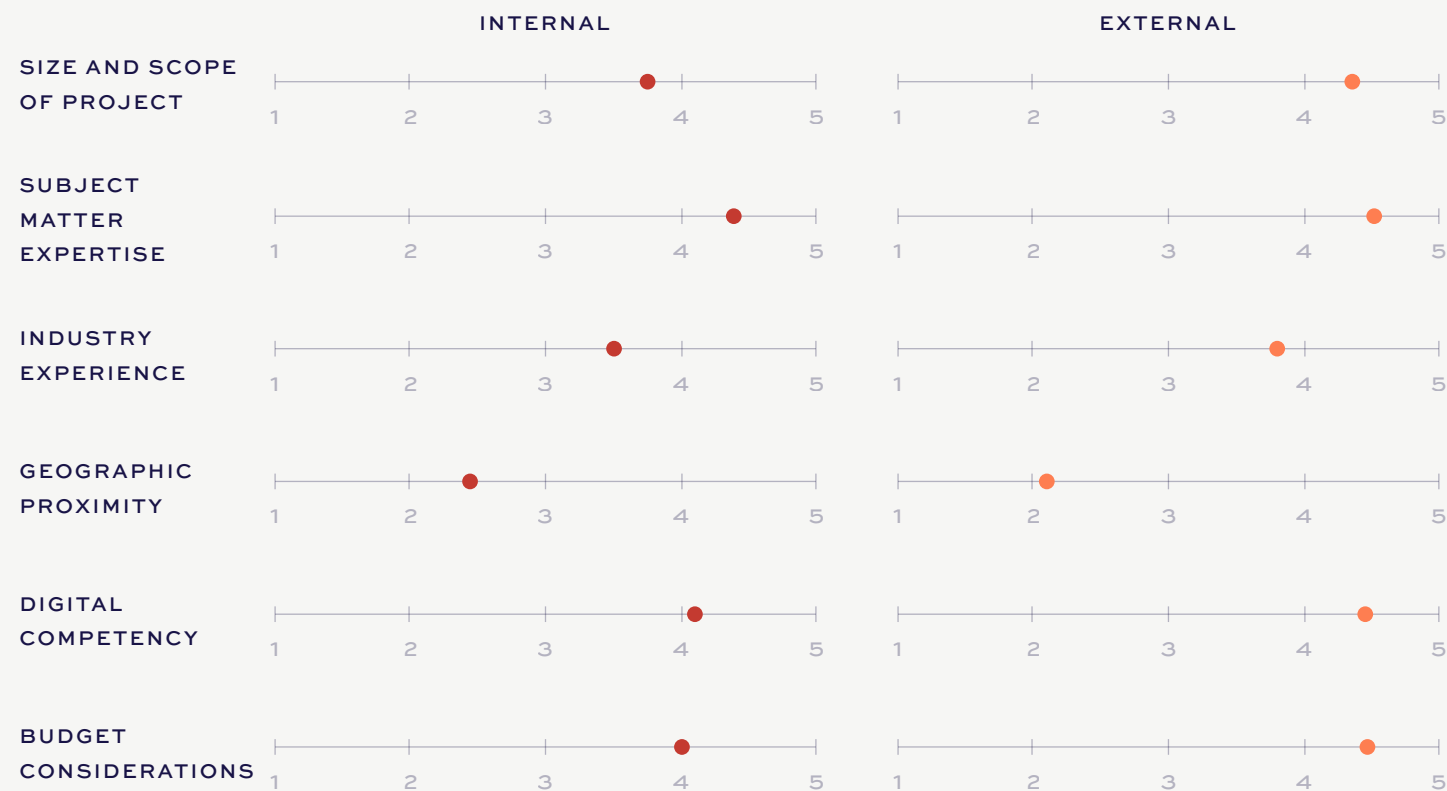
IN SUMMARY: INTERNAL RESOURCES VS. EXTERNAL PARTNERS

Subject matter expertise is a given, the expectations of external marketing partners is higher than internal teams and marketers are impartial to geographic proximity.

When, I Need, So That

The purpose of this method is to identify each of the different scenarios where marketing leaders need a particular type of marketer - whether it be a role, skill, capability, expertise or industry experience.

● **STEP 1**

The facilitator creates a three-column grid with, "When, I Need, So That" and offers an example or two to get the group going on how the method works.

EXAMPLE:

WHEN	I NEED	SO THAT
We create campaigns	More marketing strategists	They can lead campaign development from beginning to end
I am evaluating our marketing automation efforts	A consumer journey map	We understand where we should focus our investments
We've received our venture funding	An interim marketing leader	They drive acquisition and build our marketing team and capabilities
We're evaluating our internal marketing capabilities	A project-based marketing consultant	They are able to provide us with recommendations

● **STEP 2**

Map the scenarios you've outlined into the different staffing scenarios outlined below, both for internal teams and talent, as well as external marketing partners.

CONTRACT

Short or long term contractors embedded into your team to perform a specific role.

PROJECT

Project-based marketing consulting, determined by scope and deliverables.

LEADERSHIP

Interim or fractional leaders defining marketing strategy and managing execution.

DIRECT HIRE

Recruitment of marketers on behalf of companies for permanent placement.

TREND #3

A Better Way

Given the constant state of change in consumer behavior and business planning, finding the right marketing expertise at the right time is an elusive concept. To succeed, marketing leaders should always have numerous ways they can adapt their teams beyond the baseline of hiring an employee or agency.

" When deciding whether or not we need external marketing support, it's mostly a capacity thing. We have a newly formed marketing operations team, which I am excited about; they look at the data to figure out where our team should focus and when it makes sense to partner externally."

HEAD OF MARKETING AND BRANDING AT A FINANCIAL SERVICES COMPANY

Marketing automation is having its moment.

Marketers are seeing the value and ROI of relevant, timely marketing automation work. And while marketing automation tools have been around for years, they are finally being recognized as highly valuable assets to marketing's arsenal of outreach efforts. Not only can this work save marketers valuable time, but it can also create more high-engagement touchpoints with customers and prospects.

According to Frost & Sullivan's report, **COVID-19 Geopolitical Chaos Highlights the Importance of Marketing Automation Solutions**, found that "the pandemic-fueled digitization of global marketing and sales and an increasing number of marketing channels targeting niche audiences will contribute to the growth of the marketing automation sector over the next five years. The market is forecast to increase from $2.9 billion in 2020 to $6.6 billion in 2026."

Our survey results reflect these findings. Of the capabilities marketing teams do not currently have on their team, marketing automation was ranked the highest in terms of helping them achieve their 2021 goals and objectives.

Which capabilities do you not currently have on your marketing team, but believe are critical to achieving your 2021 marketing goals?

04

> " One of my marketing priorities for 2021 is making continued improvements to our student recruitment marketing efforts by increasing the effectiveness of our marketing technology. We plan to shift dollars from paid digital to organic digital."

CMO AT A UNIVERSITY

METHOD

Automation Aspirations

The purpose of this method is to discover manual marketing tasks that your team can automate. How might marketing automation improve the experience for your customers or leads? What are the benefits of automating specific tasks? This method works best with one facilitator and the marketing team serving as participants.

● STEP 1

The facilitator creates a four-column grid with four titles at the top: "Current Marketing Task, Future Marketing Opportunity (a way to improve the current task), Benefit of Automation and Possible Tool." The facilitator should then give an example or two to get the group going on how the method works.

EXAMPLE:

CURRENT MARKETING TASK	FUTURE MARKETING OPPORTUNITIES	BENEFIT OF AUTOMATION	POSSIBLE TOOL
Sending our monthly newsletter	Sending multiple targeted newsletters to different audiences and leads	More personalized content + higher lead conversion	MailChimp, Pardot, Hubspot
Researching our competitive landscape + monitoring social discussions	Automated reports on competitors and trends that compile information in real-time	Less time spent monitoring competitors without losing important insights	HootSuite
Sales leads are manually prioritized	Lead scoring and calculation of probability to convert leads to sales is automated	Higher confidence regarding which leads should be invested in	Pardot, Internal Dev Team

● STEP 2

After the team has come up with 10-15 tasks, ask everyone to vote for their top 3 favorite ideas or which they'd like to make priorities. Consider which opportunities may have the largest impact and require the least amount of investment (time and/or money). Then delegate one marketing automation goal/task to each person on your team to research.

TREND #4

A Better Way

Once you have a good sense of the consumer journey, collaborate with your team to determine what content you need and then identify repetitive tasks that can be supported by a marketing automation platform. This gives marketing leaders and their teams more time and space to focus on higher-level strategic marketing initiatives.

Collecting data isn't enough.

While many companies understand the importance and value of collecting data and aligning their insights with future strategies, it's not enough to just capture bits and pieces of information. Having access to more data and analytics means there is more information to decipher and understand, and that data needs to be clean, current and easy to understand so analysts can tie them directly to insights.

Uberflip's research What Today's Marketers Are Focused On in 2020, states "Marketers are laser focused on using intelligence, insights, predictive analytics and every data set at their disposal to generate results. They're doubling down on what campaigns have worked in the past, using data to optimize, pinpointing problem areas in the funnel,

and using all of the information at their disposal to inform what they should do next. In order to do any of the above effectively, marketers need to start capturing and consolidating data from across departments such as sales, marketing and the customer team. That way, all of the data will be under one roof and marketers, as well as the organization, will have a central source of truth that's both accessible and actionable."

Your data won't be helpful if it's not clean, current and continuously monitored and analyzed by an expert (or ideally, a team of experts). This is why investing in adding data specialists to your team can prove to be a highly lucrative decision long-term.

61%

of survey respondents said they have data measurement and analytics capabilities in-house.

42%

of survey respondents said a key priority for 2021 is leveraging data analysis for measurement and planning

—

The biggest talent demands right now are in marketing automation, measurement + analytics, and big data.

05

" I wanted to hire a segmentation specialist to work with our data scientists and create segmented plans for different markets. But with our budget constraints we weren't able to hire that person. So now I'm trying to tap a couple people doing it as a side job, which is not ideal."

HEAD OF MARKETING AND BRANDING
AT A FINANCIAL SERVICES COMPANY

"
One of our biggest challenges in marketing is getting our hands on the data. The enterprise is going through a data strategy to build out our data warehouse and all the privacy-related infrastructure related. So we are preparing our talent in anticipation."

HEAD OF MARKETING AND BRANDING
AT A FINANCIAL SERVICES COMPANY

A Better Way

One of the biggest job opportunities on marketing teams is for data measurement and analytics professionals. Make sure you have someone on your team or on an auxiliary team who is responsible for monitoring your data and sharing back any key findings, insights or trends. Just capturing it in a backend dashboard isn't enough.

METHOD

Choose Your Own Data Specialist

The purpose of this method is to understand what type of data specialist your team currently needs. According to Data Science Central, there are 400 different types of data scientists (talk about overwhelming).

This flowchart will help you and your team get clear on what type of data expert you should be adding to your team and how they can help add value. This method is more of a worksheet and only requires the hiring manager or team to review the flowchart.

● STEP 1

The hiring manager or hiring team reviews the flowchart, answering each question honestly.

● STEP 2

Discover which type of data specialist would be the best fit for your team's current needs and goals.

● STEP 3

Use this information to help determine what type of hire you're looking for, craft a job description and salary requirements and gain any necessary internal buy-in.

What type of data specialist do you need?
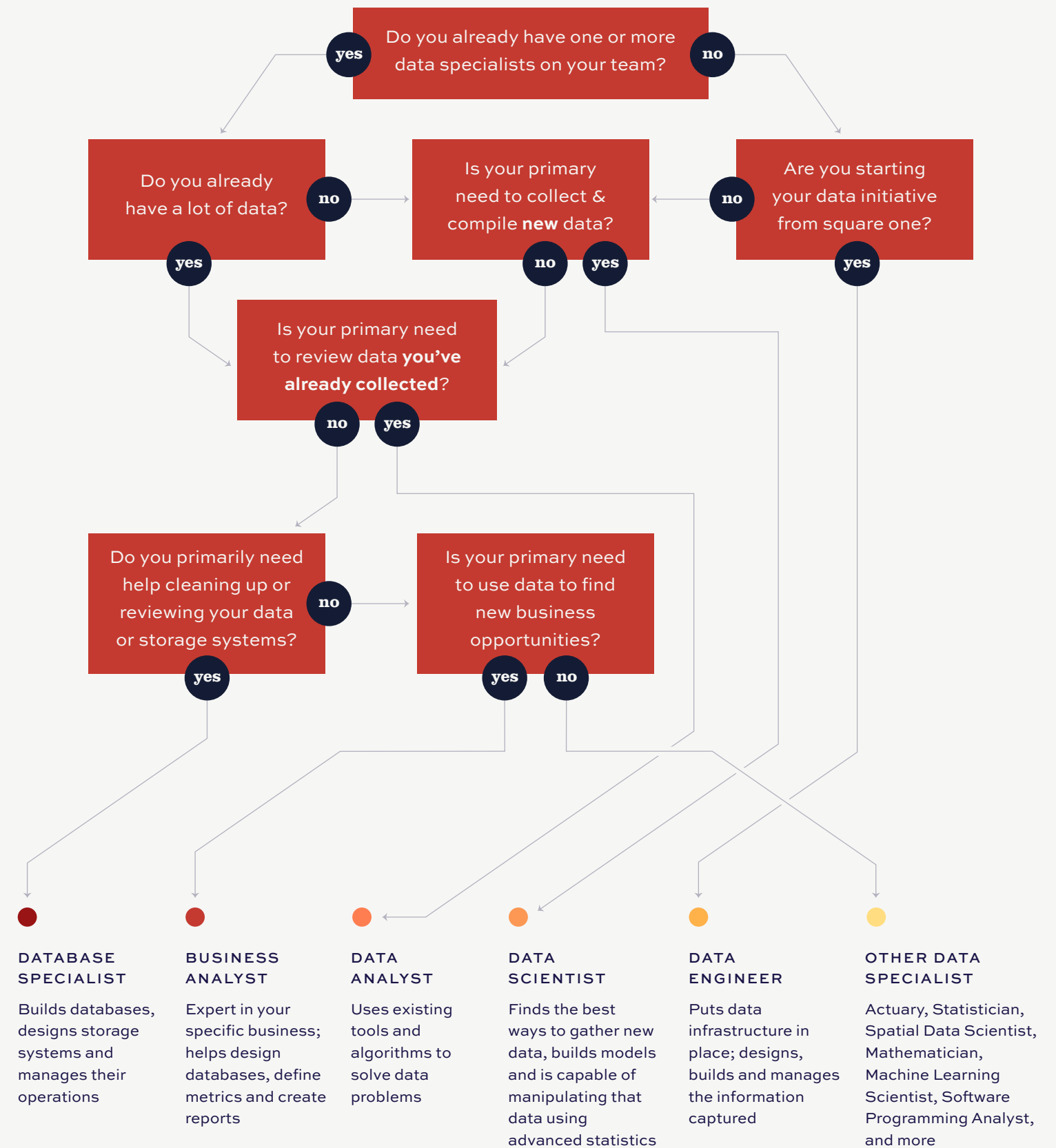
DATABASE SPECIALIST

Builds databases, designs storage systems and manages their operations

BUSINESS ANALYST

Expert in your specific business; helps design databases, define metrics and create reports

DATA ANALYST

Uses existing tools and algorithms to solve data problems

DATA SCIENTIST

Finds the best ways to gather new data, builds models and is capable of manipulating that data using advanced statistics

DATA ENGINEER

Puts data infrastructure in place; designs, builds and manages the information captured

OTHER DATA SPECIALIST

Actuary, Statistician, Spatial Data Scientist, Mathematician, Machine Learning Scientist, Software Programming Analyst, and more

CAVEAT: All of these data-specific roles intersect in multiple places and require similar skills relating to mathematics, statistics, programming, demand generation, and more. It's also important to remember that data science is a developing field so job titles might not always correlate with experience and functions, so stay flexible when reviewing resumes and job candidates.

The challenge of keeping remote teams engaged isn't going away.

06

"

Flexible working arrangements are here to stay. My company was very leery about people working from home prior to the pandemic. It was an act of God to get a set work-from-home arrangement. But I think the company will struggle to say no to that in the future."

GLOBAL ADVANCED PRODUCT MARKETER AT A MANUFACTURING COMPANY

Last year, millions of people were forced to get creative with their work-from-home set-ups as they tried to figure out how to stay connected to their coworkers, colleagues and clients. A huge challenge for marketing leaders has been keeping their remote workforce engaged and inspired, and this challenge isn't going to disappear overnight - or possibly ever.

While many marketing leaders had been managing a global, remote workforce for years, some were newly thrust into the world of Zoom, Slack and Microsoft Teams. Add on top of that the stress of a deadly virus, children learning and playing from home and the stress of the unknown. In 2021, we're noticing that many of the challenges and benefits associated with managing a remote team might be here to stay.

According to the **Harvard Business Review**, "The key is resisting the temptation to make work tactical only through strict processes, rules, and procedures. While some degree of boundaries and guidelines help people move quickly, too many create a vicious spiral of demotivation. In such cases, people tend to stop problem-solving and thinking creatively, and instead, do the bare minimum. If you want your teams to be engaged in their work, you have to make their work engaging."

Which tools are critical to the success of your marketing team working remotely?

Bar chart (vertical) with y-axis percentages: 80%, 60%, 40%, 20%

Categories (left to right): EMAIL, MICROSOFT TEAMS, ZOOM, SHAREPOINT, TEXT, GOOGLE DRIVE, SLACK, WEBEX, DROPBOX, ASANA, GOOGLE MEET, MIRO, HARVEST
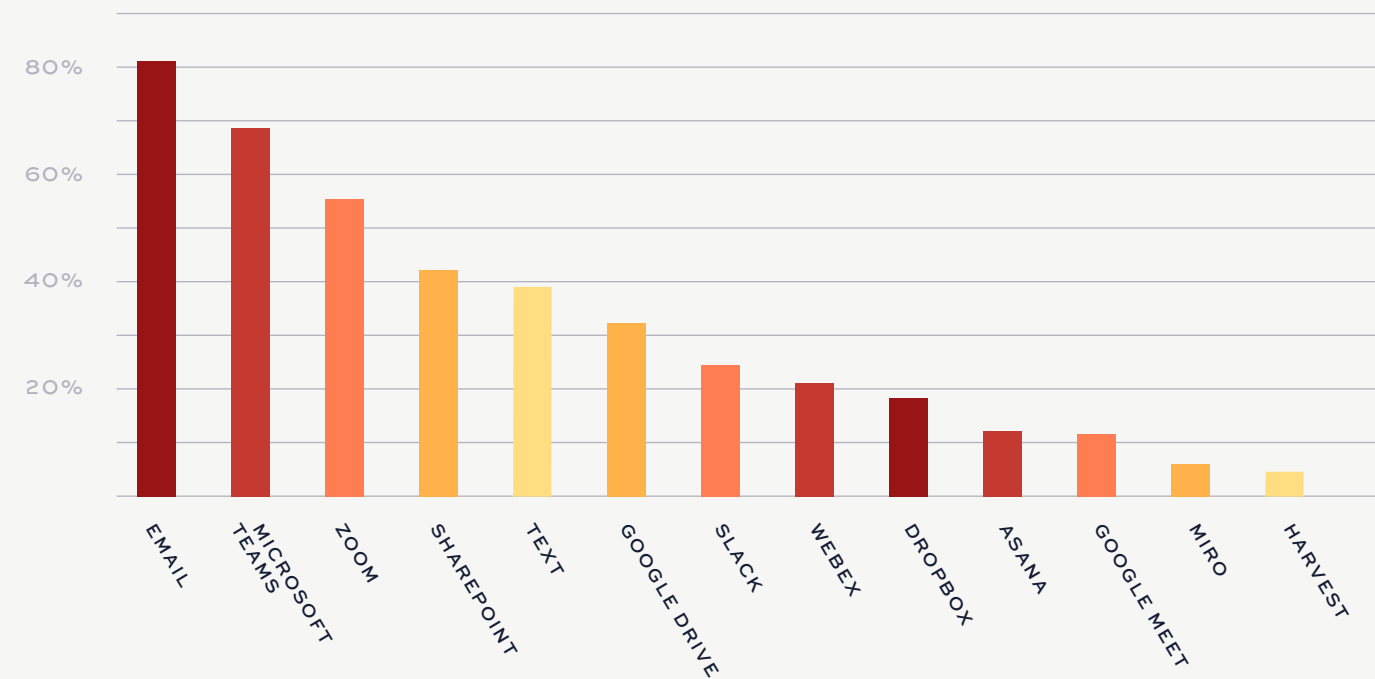
Additional hacks and tips from survey respondents:

- Act as if you're going into the office (get dressed, have set work hours, etc.). This helps you stay professional at all times and focus on your work better.

- Block your calendar for uninterrupted, focused work time

- Use tools like Miro or Mural for virtual, real-time discussions and brainstorming

- Take a walk during some meetings

- Since you never 'see' anyone anymore, make more time for informal conversations during meetings

- Schedule shorter meetings and take breaks throughout the day

- Buy the best webcam you can afford and have a solid plan for collaborating in real-time

- Work during focused hours and then leave it alone for the day; set firm work/life boundaries and stick to them

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TREND #6

A Better Way

The move from in-office to remote work needs long-term solutions to help individuals stay motivated and connected to their teams. These solutions inherently vary based on work culture, personality type, job function and more. But rather than using a one-size-fits-all approach to team engagement, find ways to connect with each of your individual team members based on their needs, schedules and personalities. Empower your employees by giving them the opportunity to experiment and solve problems that really matter. Help your team discover distinct problems in your organization that need solving by asking questions like: What's broken that our team can fix? Where can we deliver amazing service to our customers? What helps drive growth during a time of fear or unknown?

METHOD

Remote Control

The purpose of this method is to engage your remote workforce and get them to share what makes them most excited to go to work and collaborate with their team. This method works best with one facilitator (preferably a team's manager) and multiple contributors (preferably the team members themselves).

STEP 1

Articulate and define what "engagement" means to you and your organization. This will help get your whole team on the same page. Write down everyone's thoughts and contributions on a whiteboard or in a shared document online.

STEP 2

Ask everyone to answer the following questions either on a sheet of paper, via direct message or some other way where they can privately, honestly answer the questions:

1 I feel most engaged at work when

2 My favorite part about working remotely is

3 My least favorite part about working remotely is

4 I wish my manager knew

5 I wish my teammates knew

STEP 3

Collect the responses and read them aloud, going down the list one at a time. Keep an eye out for themes.

STEP 4

Brainstorm time! Have your group create **"How Might We" statements**, which will be used to guide the co-creation of ideas. Make sure your team has access to a pad of Post-it notes and a Sharpie. Then ask everyone to come up with ideas that they believe would help better engage the team, based on the information previously shared. Set a timer for 5 minutes and see how many ideas your team can generate; maybe they're event ideas or communication changes. It doesn't matter what they are, just get your team sharing ways to improve the WFH experience.

STEP 5

Group all the ideas by theme and then share them out after the session. Work with a smaller team to prioritize and implement any ideas that seem achievable and impactful.

Need help finding a better way?

If you're interested in scheduling a one-hour work session with an Antenna consultant to walk you through any of the methods in the report, please reach out to Tricia Varner:

TRICIA VARNER
Client Development Director
tvarner@goantenna.com
612.383.2647

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Method Worksheets

The Marketing Matrix

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● **STEP 1**

Based on your marketing objectives and strategies, spend 30 minutes discussing what your team wants to accomplish in the upcoming quarter. The facilitator captures each of these ideas in a place everyone can see. (Protip: **Mural** is one of our favorite online collaboration tools.)

● **STEP 2**

Create a simple matrix to evaluate and prioritize your ideas based on consumer desirability, business viability and technical feasibility. For each factor, rate the goal a 3 (low), 6 (medium) or 9 (high).

GOAL	CONSUMER	BUSINESS	TECHNOLOGY	**TOTAL**

● **STEP 3**

Create a learning agenda that outlines the key questions you want to get answered, along with the KPIs used to measure effectiveness.

Here is a learning agenda template you can use.

OBJECTIVE	QUESTIONS	ASSUMPTIONS	KPI(S)

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Motivations and Barriers

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MOTIVATORS	BARRIERS

● **STEP 2**

Have your group decide on which 2-3 motivations or barriers you would like to focus on and then create **"How Might We" statements**, which will be used to guide the co-creation of ideas in the next step.

● **STEP 3**

For each "How Might We" statement, spend 15 minutes sketching as many solutions as possible. Once finished, the facilitator groups the ideas into themes and helps the team focus on where to take them next.

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Create a learning agenda that outlines the key questions you want to get answered, along with the KPIs used to measure effectiveness.

OBJECTIVE	QUESTIONS	ASSUMPTIONS	KPI(S)

antenna

When, I Need, So That

The purpose of this method is to identify each of the different scenarios where marketing leaders need a particular type of marketer - whether it be a role, skill, capability, expertise or industry experience.

● **STEP 1**

The facilitator creates a three-column grid with, "When, I Need, So That" and offers an example or two to get the group going on how the method works.

WHEN	I NEED	SO THAT

● **STEP 2**

Map the scenarios you've outlined into the different staffing scenarios outlined below, both for internal teams and talent, as well as external marketing partners.

CONTRACT

Short or long term contractors embedded into your team to perform a specific role.

PROJECT

Project-based marketing consulting, determined by scope and deliverables.

LEADERSHIP

Interim or fractional leaders defining marketing strategy and managing execution.

DIRECT HIRE

Recruitment of marketers on behalf of companies for permanent placement.

Automation Aspirations

The purpose of this method is to discover manual marketing tasks that your team can automate. How might marketing automation improve the experience for your customers or leads? What are the benefits of automating specific tasks? This method works best with one facilitator and the marketing team serving as participants.

● **STEP 1**

The facilitator creates a four-column grid with four titles at the top: "Current Marketing Task, Future Marketing Opportunity (a way to improve the current task), Benefit of Automation and Possible Tool." The facilitator should then give an example or two to get the group going on how the method works.

CURRENT MARKETING TASK	FUTURE MARKETING OPPORTUNITIES	BENEFIT OF AUTOMATION	POSSIBLE TOOL

● **STEP 2**

After the team has come up with 10-15 tasks, ask everyone to vote for their top 3 favorite ideas or which they'd like to make priorities. Consider which opportunities may have the largest impact and require the least amount of investment (time and/or money). Then delegate one marketing automation goal/task to each person on your team to research.

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What type of data specialist do you need?

Do you already have one or more data specialists on your team?
— yes → / no →

Do you already have a lot of data?
— no → **Is your primary need to collect & compile new data?**
— yes ↓

Are you starting your data initiative from square one?
— no → / yes ↓

Is your primary need to review data you've already collected?
— no → / yes ↓

Do you primarily need help cleaning up or reviewing your data or storage systems?
— no → **Is your primary need to use data to find new business opportunities?**
— yes ↓ / no ↓

DATABASE SPECIALIST
Builds databases, designs storage systems and manages their operations

BUSINESS ANALYST
Expert in your specific business; helps design databases, define metrics and create reports

DATA ANALYST
Uses existing tools and algorithms to solve data problems

DATA SCIENTIST
Finds the best ways to gather new data, builds models and is capable of manipulating that data using advanced statistics

DATA ENGINEER
Puts data infrastructure in place; designs, builds and manages the information captured

OTHER DATA SPECIALIST
Actuary, Statistician, Spatial Data Scientist, Mathematician, Machine Learning Scientist, Software Programming Analyst, and more

CAVEAT: All of these data-specific roles intersect in multiple places and require similar skills relating to mathematics, statistics, programming, demand generation, and more. It's also important to remember that data science is a developing field so job titles might not always correlate with experience and functions, so stay flexible when reviewing resumes and job candidates.

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Remote Control

The purpose of this method is to engage your remote workforce and get them to share what makes them most excited to go to work and collaborate with their team. This method works best with one facilitator (preferably a team's manager) and multiple contributors (preferably the team members themselves).

● **STEP 1**

Articulate and define what "engagement" means to you and your organization. This will help get your whole team on the same page. Write down everyone's thoughts and contributions on a whiteboard or in a shared document online.

● **STEP 2**

Ask everyone to answer the following questions either on a sheet of paper, via direct message or some other way where they can privately, honestly answer the questions:

1 I feel most engaged at work when _____

2 My favorite part about working remotely is _____

3 My least favorite part about working remotely is _____

4 I wish my manager knew _____

5 I wish my teammates knew _____

● **STEP 3**

Collect the responses and read them aloud, going down the list one at a time. Keep an eye out for themes.

● **STEP 4**

Brainstorm time! Have your group create **"How Might We" statements**, which will be used to guide the co-creation of ideas. Make sure your team has access to a pad of Post-it notes and a Sharpie. Then ask everyone to come up with ideas that they believe would help better engage the team, based on the information previously shared. Set a timer for 5 minutes and see how many ideas your team can generate; maybe they're event ideas or communication changes. It doesn't matter what they are, just get your team sharing ways to improve the WFH experience.

● **STEP 5**

Group all the ideas by theme and then share them out after the session. Work with a smaller team to prioritize and implement any ideas that seem achievable and impactful.