

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).

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)