24 Tactics, Templates, and Tips to Help You Own and Crush Your Marketing Role

Laura Laire
LAIRE | A Digital Growth Agency

About Laura Laire

Laura Laire is a Co-Founder and Creative Business Strategist at LAIRE, a digital marketing agency. An entrepreneur for more than 20 years, Laura is a proven business architect skilled in creative marketing, sales, team building, operational efficiency, and management, with a love for inspiring and creating big ideas. Laura thrives on challenging the status quo by asking "How can we make this better?".

"You either innovate or become irrelevant." -LL

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The Reality of Your Marketing Role

1.) You probably juggle multiple responsibilities and wear many different hats to get the job done.

2.) You have more work than you have time to complete.

3.) You want to excel, and put your stamp on the role you're in.

4.) You want to be seen as smart, innovative, and efficient.

We’re Going to Discuss:

STREAMLINE INTERNAL PROCESSES (PROBLEMS 1-17)

- Remove the Small Tasks That Derail Your Day
- Reevaluate Your Org Structure
- Manage the Process Instead of It Managing You
- Take Back Your Marketing Meetings
- Be More Efficient With Your Planning
- Harness Technology

PERFECT EXTERNAL PROCESSES (PROBLEMS 18-23)

- Break Down Silos & Align with Other Departments
- Focus On the KPIs That Matter
- Fill the Gaps
- It Starts With You

PROBLEM

Definition: A matter or situation regarded as unwelcome or harmful and needing to be dealt with and overcome.

TACTIC

Definition: An action or strategy carefully planned to achieve a specific end.

Remove the Small Tasks That Derail Your Day

Internal pain points inhibit your productivity and happiness! Document them for 1-2 weeks, then find solvable patterns, to batch tasks, shift to another teammate, or solve with automation.

PROBLEM #1

The team interrupts you to ask for branding assets (or that brochure, or a copy of the presentation...).

TACTIC #1

Place all the assets in a shared asset drive, and clearly label and organize it quarterly. Give a team lesson on how they can be accessed and record it for future generations. When you're asked again, remind them where it is with a link to the recording and/or drive.

PROBLEM #2

You get endless back and forth emails to pick a common meeting time.

TACTIC #2

Set up an auto link to book meetings and include it in your email signature (Calendly, HubSpot, Simplybook). Then refer people to that link when they ask you if you're available.

PRO TIP

Set your meeting schedule, how much notice or time you need between meetings, as well as times of day available so you have blocks of focus time, mealtime, etc., so you don't get derailed.

PROBLEM #3

The Sales team has an immediate request for tools or assets that they need created now.

TACTIC #3

Set a regular planning meeting with the department who most often derails you with their requests. You can use a shared project management tool (like Trello, Asana, Monday, etc.) that they enter and prioritize their requests. OR create a workload spreadsheet with statuses — they prioritize the assets and provide all the details you need.

REMOVE THE SMALL TASKS

DOWNLOAD TEMPLATE: WORKLOAD SPREADSHEET

Marketing Assets - Proposed & Committed

File Edit View Insert Format Data Tools Extensions Help Last edit was seconds ago

Link to Creative Brief (MAKE A COPY)

SUBMITTED	REQUESTED BY	DEPARTMENT	PROJECT DESCRIPTION	LINK TO CREATIVE BRIEF	AGREED BY MARKETING	DUE DATE	Completed
IN PROGRESS							
9/2/2021	Aaron	Sales	2 Videos - Overview & New Products	LINK	YES	09/02	
9/9/2021	Lisa	Production	Spec Sheet	LINK	YES	9/9	
9/9/2021	Hannah	HR	Benefits Handout	LINK	YES	9/9	YES
10/04/2021	Hannah/Jessie	Sales	TradeShow Booth	LINK	YES	10/04	
IN THE PIPELINE							
9/15/2021	Laura	Sales	Website Animations	LINK			
9/15/2021	Laura	Production	Brand Guide Additions	LINK			
9/14/2021	Lisa	LAIRE	Services Video	LINK		ON HOLD/NEXT	
ON HOLD - TBD							
9/9/2021	Jessie	R & D	New look for LAIRE social graphics (Oct)			12/17/2021	
9/10/2021	Terrel	Sales	2022 Forecasting Brochure	LINK		12/18/2021	

Trello

asana

monday.com

Basecamp

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PROBLEM #4

You're never getting the big stuff done. Beyond meetings that appear on your schedule, your team's interruptions to your day push you off track.

TACTIC #4

Book deep-work time for yourself and turn off notifications. Others can see that time is blocked off. "Eat the Frog First" — start your day with the big, unpleasant things when you're fresh, and get them out of the way.

PRO TIP

At the end of the day make a list of the THREE BIG THINGS you'll tackle the next morning, and then do them first!

Reevaluate Your Org Structure

Do you have the right people in the right seats? Get it right, and your productivity goes up, and frustration goes down.

PROBLEM #5

Tasks are taking too long because the wrong person is doing them.

TACTIC #5

Survey your team to understand what their strengths lie. Identify team roles and responsibilities that are a match to those strengths. Be agile, because roles change as people grow and learn.

PROBLEM #6

People come to you for *everything*. How to do this, where to find that….

TACTIC #6

Documentation is the answer. If you are on a team share the knowledge and distribute the responsibility across the team. If you are solo, use documentation through guides or videos (like Loom) that you can refer people to, in a shared drive, available 24/7.

Manage the Process Instead of It Managing You

Reevaluate, innovate, and streamline
why you do things the way you do.
End being reactive and go proactive.

PROBLEM #7
There's a production schedule or turnaround time that you miss you every month.

TACTIC #7
Change the schedule and give yourself more time where you need it. Question how other people's roles affect the bigger picture. How can they be adjusted so you meet your deadlines?

PROBLEM #8
Tasks are taking too long and ping-ponging around the team, making the process inefficient and adding labor.

TACTIC #8
Question the steps a task takes — could it move faster if you combine steps, or remove step X? Does that person *really* need to review it? Create the new flow, present it to the team, and try it. And don't give up after 1-2 tries. It takes time to get used to change.

PROBLEM #9

You're not getting approvals or sign-offs on time.

TACTIC #9

Set your expectations and clear deadlines with the team, plus share the reasons behind that deadline (ex: "to hit our weekly newsletter date"). Map out follow-up notifications*, and when the deadline isn't met, proceed with the next action, like publishing that blog or social posts anyway. They will learn the train keeps chugging!

*We like red exclamation mark emojis for the subject lines of these follow-up emails. ‼️

Take Back Your Marketing Meetings

Prevent meetings from overrunning your life by standardizing and optimizing them. Shorter and more impactful is better than longer with fluff. There's no rule on how much time provides value in a meeting, so the shorter the better.

PROBLEM #10

The people you work with don't know when you're booked, and you don't know when they're booked.

TACTIC #10

Use a shared work calendar (ex: everyone on the team uses Google Calendar) to ensure that all team members have equal visibility to what daily schedules looks like.

PRO TIP

Connect your Google Calendar to Slack so your Slack profile shows when you're in a meeting.

PROBLEM #11

Meetings have no goals, so they are not productive, or they go on and on, or they get canceled.

TACTIC #11

Set the meeting time for a shorter length, such as 30 minutes – it shows you mean business.
Email reminders 24 hours in advance to avoid cancellations, and more notice for you if it does need to be moved.
Share an agenda for what will be discussed. Create an agenda template that your team uses, and list action items so notes stay centralized. Stay on task. When you're done with the action items, you're done with the meeting!

PRO TIP

Kick-off the meeting with KPIs, celebrating wins and past action items.

DOWNLOAD TEMPLATE: MEETING AGENDA

<COMPANY LOGO>

MEETING FOCUS // YOUR DEPARTMENT Meeting Agenda
DATE: XX/XX/XXXX

Attendees: NAME(s) | DEPARTMENT(s)

Time: X:XX am

<COMPANY> Traffic Overview

	DEC 2020 MTD:	DEC 2021 MTD:	2020 YTD:	2021 YTD:
Website Traffic				
Session to Contact Rate				
Leads				

{LINK TO ANALYTICS HERE}

- HEADLINES FOR THAT TOPIC:
  - List wins for the week
  - Don't forget to go over new contacts & leads from above and follow up with last week's contacts & leads
  - Give insight into contacts & leads, where they came from (organic search, etc.)
  - Focus on growth and upward trajectory!
  - Get creative with good news and identifying wins!
- ACTION ITEM/UPDATE 1:
  - Be Descriptive and Positive

PROBLEM #12

There's no follow up email, so after meetings, people aren't doing their assigned tasks, and you're treading water.

TACTIC #12

Decide team to-dos in the meeting and send a post-meeting follow-up within 24 hours with assigned to-dos and deadlines (don't expect that they took their own notes).

STREAMLINE INTERNAL PROCESSES

Be More Efficient with Your Planning

How to be the boss of planning content, campaigns, and digital advertising.

PROBLEM #13

Your content schedule doesn’t flow — to much, too little, not on time.

TACTIC #13

Dedicate the time to plan out quarterly content. Think long term, big view! It will be a roadmap to the end goal versus just the next step. Include progress toggles on your content calendar so your team can check status at any time and understand dependencies.

Check out the blog: “How to Plan Six Months of Blog Content in 30 Minutes”

READ THIS RESOURCE

PROBLEM #14

Coordinating with your vendor partners or extended team is taking too much time.

TACTIC #14

Vendor management initially requires time to set the standard. Then the systems you set can be rolled out to other vendors and followed.

Shared docs, drives, project management software, and Slack, gets you on the same page and quickly communicating. Share the FULL approved creative brief with dates, along with a link to your centralized brand assets.

DOWNLOAD TEMPLATE: CREATIVE BRIEF

<COMPANY LOGO>

Written Content Creative Brief

TITLE: Title of the Content Here

DUE DATE: XX/XX/XXXX

TOPIC

- Topic angle/purpose:
- Focus keyword/phrase:
- tional keywords:

OVERVIEW

- Content-type:
- Length:
- Target persona:
- Persona industry:
- Persona job function or role:
- Persona pain points:
- How this content will benefit the persona:
- Buyer's journey stage:
- Tone:
- Point of view:

ADDITIONAL NOTES

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STREAMLINE INTERNAL PROCESSES

Harness Technology

Automate your processes and tools — wherever you have manual entry and spreadsheets, consider automation and integration solutions.

PROBLEM #15

Preparing reports takes too much time.

TACTIC #15

Use a data aggregator service for your regular reporting. Check out web-based tools like Databox, HubSpot, DashThis, etc. to pull together all of your analytics in one place (social media, website, leads, content and more).
These dashboards can be shared among your team, with notes so you don’t have to walk them through it.

PROBLEM #16

Jumping between systems is inaccurate and time wasting.

TACTIC #16

Question the purpose of these multiple systems. Can they be combined? Integrations and custom APIs can be put in place to save *everyone* time.

Find out what platforms you use for what and get buy-in from the team to combine or find a new solution that integrates all your needs.

PROBLEM #17

You're the only one who knows how to use that software.

TACTIC #17

Identify at least two other individuals in your organization who are willing and able to be trained on the daily tools that you use. Or refer your team to the Knowledge Center, and their fall back is the tech support 1-800 #!

Going back to documentation, use Loom videos and share guides. Send a link to a doc versus taking the time to explain to every new hire.

Break Down Silos & Align with Other Departments

Cozy up to Sales, and R&D, and… any other departments that rely on you!
Understanding their objectives and benchmarks will help you fine-tune your marketing strategies, support their goals, AND prove marketing ROI.

PROBLEM #18

Other departments don't understand how marketing can help them meet their goals.

TACTIC #18

Embed a marketing point-of-view into other departments' strategic plans. How does marketing fit into the mix, and how can you support their goals?

For example, the Sales department needs a spec sheet of product features. A marketing POV will add benefits and competitive advantages, which better connects with the buyer. Win, win.

Everything can be a marketing asset, and everyone benefits when marketing has eyes on company materials.

PROBLEM #19

Your departments operate in silos.

TACTIC #19

Collaboration is KEY! Set up regular communication or a check-in with one key member of each department.

Also, build a topic-focused channel (ex: Slack, Teams) with those key members. This can be a HUGE time saver, keeps you organized, and opens communication to become more collaborative.

Focus on the KPIs That Matter

People get overwhelmed with numbers, numbers, numbers. Put your energy into showing what is moving the needle.

PROBLEM #20

Your reporting is focused on numbers.

TACTIC #20

Report on IMPACT, not on numbers. For example, reporting on website sessions, while it may be impressive datapoint, will likely have far less impact than highlighting Organic Sessions to Conversions — even if that number is far smaller than site sessions.
Verbalizing how the numbers impact revenue is more important than analytics.

PROBLEM #21

Management and/or Departments are zoning out on your reporting presentations.

TACTIC #21

Align reporting with company or department goals. Marketers are generally the gatekeepers of data, and may *assume* what leaders will find value in.

Which KPIs does your boss want to see?
Which ones do other Department Directors find valuable?
Create separate reports by department.

PROBLEM #22

KPI TMI!

TACTIC #22

Get to the point in reporting. Do not present 45 areas of data. Keep it to 5-6 super valuable metrics per reporting topic. For website traffic you may have access to 25 datapoints but narrow it down.
For example:

- Organic sessions
- Contacts by Source
- Sessions to conversions
- Sessions by Source
- Top Performing Pages

Fill the Gaps

Build resources. Know when to reach outside or expand your team. Weigh the cost of bringing talent in-house vs. vendor partners.

PROBLEM #23

There's just not enough of you. Or your team is missing the skills in a certain areas.

TACTIC #23

Is there a budget to add to your team, and strengthen your department? If not, building an extended team could improve productivity, quality, and reduce costs. Freelance, Contractors or Niche Agency:

- Paid Media
- Content
- Public Relations
- Website Design & Development
- Lead Gen
- Graphic Design

It Starts With You

In order to own and crush your marketing role you have to believe that you can.

PROBLEM #24

There will always be problems.

TACTIC #24

You will find what you are looking for – if you're looking for problems, you'll find them. If you're looking for solutions, you'll find them.

The key is to spend your time focused on solutions. There is a solution to every problem.

Every successful employee, CEO, and entrepreneur has the right mindset. And that's the first ingredient of your success.

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& CRUSH YOUR
MARKETING ROLE!

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