The Marketing Dojo

CMO Rules Workbook

Congratulations on joining The Marketing Dojo and committing towards earning your Marketing Black Belt.

Our CMO Rules video series goes over TEN rules every marketer should follow to be successful. We encourage you to watch one video a week and then work on the action items from the video before moving on to the next.

Action:
Make the commitment to this learning series! Schedule a 30-minute block every week to view the video lesson and time to do any of the action items from the lesson.

Video Lessons

All the video lessons are all housed **here**. You have free lifetime access to these courses. .

Action:
Make sure you have access to this page and can see all the videos. If you're having problems, please **email us here.**

Access the video library!

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The Marketing Dojo | sherpa | McKim

What's Inside:

What you'll learn

Lessons

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Worksheets and Templates

- Top Marketing Automation Tools
- Content Engine Planner
- Referral Pipeline Builder
- Niche Domination Worksheet

What you'll learn

Throughout the ten videos in this series, you'll learn how to:

- Stand out and wow your customers by creating memorable customer experiences that blow them away.
- You'll learn how to measure things that matter to determine if your campaign was a success, by setting win conditions and designing the perfect funnel.
- Create a marketing/lead engine that can be systemized and scaled in order for you to grow your business.
- Learn how and when to use automation to help you free up valuable time and resources.
- Craft the perfect positioning statement AND get your team onboard to use that statement as their north star.
- Dominate one niche and grow to other niches.
- Build a solid referral funnel that your customers will be excited to share their contacts with you and then systemize it so that it runs smoothly.
- Build a world-class team, because when you hire the right types of people, you build trust in your team and give them more responsibilities, letting you focus on building and growing your business.
- Write clear marketing briefs, what details to include and what information to have on hand.
- Gain back 4-6 hours of your week and build design your ideal week, helping you create the work/life harmony that is right for you.

Wow Your Customers – The Remix Strategy

WOW zone customers are your best source for repeat business and referrals. Wowing your customers creates a relationship and trust that you can tap into for future business at a fraction of the cost of acquiring a new customer.

Truly "wowing" your customers is not something you can do halfway. You need to create unique and memorable customer experiences.

Your core offering needs to be great, and your sales and customer service departments need to be even better.

Kick-ass Marketing Department

\+ Remix Strategy

Unique and memorable customer experiences that turn your customers into brand advocates

Exercise: Take a second and think of a brand that you've had a great experience with lately. One that you would go out of your way to recommend to someone else.

- What was about it that was so great?

- What made it feel special and/or unique?

Our job as marketers is to create unique experiences that completely stand out from any of your competitors.

Ask yourself:

- What can you or your business do that no one else in your industry does?

- How can you disrupt the mindset of what is expected by your target audience?

Ideas

The Remix Strategy

This process is all about leveraging what works in other (unrelated) industries to give you inspiration to create something new and unique in your own industry.

Example:
An autobody shop that washes your car after your appointment. – This is pretty predictable.

You have a meeting with your financial planner and when you go to the parking lot after the meeting you find your car has been washed. - Now that's the totally unique and unexpected value you're trying to achieve.

The key to the Remix Strategy is to focus on creating unique, memorable, and unexpected value in your customer experiences.

The way to move your customers into the WOW Zone is by using the Remix Strategy to repurpose examples of great customer service that you've seen in other industries.

Action Items:

- Think about some value-added experiences that you've had with businesses in the past
- Produce your own remix strategy where you offer a unique and unexpected experience to your customers.
- Put into action!

Describe some value-added experiences you've experienced in the past

Remix Strategy – think of how you can create a unique, memorable and value-added experience to YOUR customers

Now put one of your Remix Strategies into ACTION!

Measure Everything

What doesn't get measured, doesn't get done.

Let's go over how to measure what actually matters to you.
Your mission is to close the measurement loop on as many of your marketing initiatives as you can.

Step 1: Define Win Conditions

For every campaign you'll want to define your Win and Lose Conditions. Anyone should be able to look back at the campaign and ask the question, did we hit our goals or not?

Win conditions should be:

1. Quantifiable
2. Measurable
3. Tangible Value to the Company

Example of win conditions:

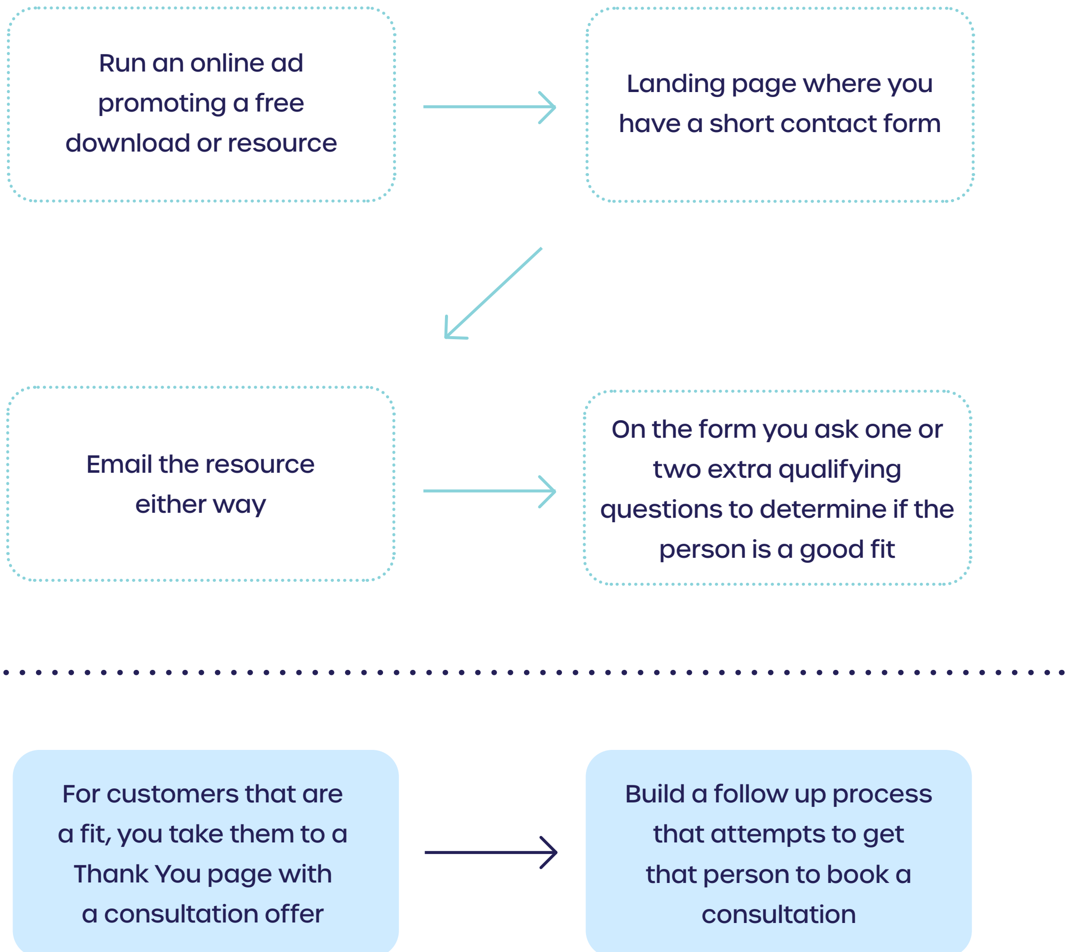
- Cost per lead is $2
- Cost per qualified sales meeting booked is $400
- Return on Ad Spend of 4:1

What results do your company need to care about? This should be your win condition. (think about what drives business success.)

Step 2: Design Your Funnel

From your advertisement(s) to your final win condition, determine what your funnel looks like.

Here's an example:



Example:

Step 3: Measure It

Whatever you do, make sure that you can and do measure it:

- Make sure all your ads have UTM Parameters Built in for full measurability
- Make sure your lead forms are capturing the UTM parameters.
- Make sure you can cross reference that list of Leads that have book a free consultation with your customer list

Step 4: Review your Results

- Build a weekly meeting to review results and track performance over time.
- Measure manually at first, export CSV files, and cross reference to build your weekly reports at first.
- Then bring in the tools to automate and scale.

Action Items

- Step 1: Define your win and lose conditions for the campaign you are currently developing.
- Step 2: Design your funnel (for wire frames and funnels, we love using LucidChart)
- Step 3: Measure everything:
  - Set up your UTM parameters.
  - Capture those UTM parameters.
- Step 4: Set up a weekly meeting to review the results.

Notes:

Build a Marketing (Lead) Engine

[Download the Content Engine Planner]

To grow your topline, you need to be finding new customers all the time.

Instead of creating a new campaign right after the next, let's build one campaign that keeps getting you leads. It starts with a paradigm shift.

Here is our strategy

1. Measure
2. Systemize
3. Scale
4. Improve

In the ABM example shown in the video, we were missing a process document that included:

- Step by step instructions
- The companies we were looking for
- Where to do the research
- How to qualify the potential customers
- The text to use in the intro email
- What to send them as a package to get their attention and where to source it
- The script for your sales representative to use on the call
- What to measure
- Where to record the results

The campaign would be measurable and repeatable if it was systemized. You need to find or create bandwidth on your team, and you create the process doc that details exactly what needs to be done at each step.

After a few iterations, you'll know you'll have something or not. If you're on the right track, scale it and then refine it. **Systemize your processes!**

Inbound

If you want more customers or leads, run a campaign to capture their interest by offering them something valuable. Give them access to a unique tool or content in exchange for their email or phone number - this is something you can measure. This piece of content is called a lead-magnet.

Recap

Don't do anything you can't:

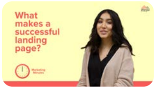
- Measure
- Systemize
- Scale

Other resources:

Marketing Minutes: As a developer, how do I get more qualified leads?

Marketing Minutes: How to boost sales on a limited budget

Marketing Minutes: How to leverage your website to capture more leads



Marketing Minutes: What makes a successful landing page?

Blog Article: How landing pages can help your business

Action Items:

- Look at a campaign that is currently running or one that you are building. Figure out how you can systemize it, measure it and then scale it if it makes sense.
- Create a high-value lead-magnet to attract customers to your site and receive their email addresses in exchange for the content. Place the lead magnet on a landing page for easier measurability.
- Review other resources for more ideas on how to increase leads, and don't forget to systemize, measure and scale your strategies.

Notes

Use Automation

Get more done in your day or week by adding automation tools.

Here we're going to go over two key areas:

1. Saving time using email processes
2. Marketing automation

1. Saving Time Using Email Processes

These tips will help all those who use Office 365.

Use Rules to Manage your Inbox

Carve out some time to manage your inbox by creating rules to sort out your inbox, letting the less urgent things filter into one folder letting your more important and urgent emails be seen front and center.

Tutorial: Check out this detailed video on how to set Rules to manage your inbox:
https://youtu.be/87cqwadac6Y

We also love this video that offers many techniques to whip your inbox into shape:
https://youtu.be/5M2Kq__5V24A

Create Templates in Outlook

For emails that you send out on a regular basis, don't search old emails to copy and paste. Save any block of text as a template and you can access it at any time. Do this with your 10 most common emails.

Use QuickParts

Type in a keyword and hit tab and it automatically populates a template for you formatted perfectly.

Tutorial: This video goes over both creating templates in Outlook and using QuickParts:
https://youtu.be/RSlfhjbIoK8

GSuite

For GSuite users, there are ways to better manage your inbox. Simply do a search in the Chrome store for downloads and extensions to help you manage your inbox.

Tutorial to create an email template in Gmail:
https://youtu.be/Y3XmYym2sNQ

2. Marketing Automation Software

In the example in the video of a simple marketing automation sequence:

- You get a lead from your inbound marketing strategy on your website and automatically that person gets a two-week long set of introductory emails.

It connects to their pain-points, and shows how your company can add value.

- Position your weekly newsletter and what to expect
- Build trust by introducing them to your company and some of the people who will be taking care of them.

Then they receive the best performing newsletter from the past year, then get put on the regular newsletter subscriber email.

Set up different email sequences for each segment

- Partners
- Dealers
- Influences
- Customers
- Prospects
- ETC

You don't have to create content from scratch for each group but make sure you take a few minutes to modify the emails for each segment, whether it be tone or message can improve on the results.

Marketing automation is all about designing the flow of communication between your company and your leads until they activate and get passed on to your sales team.

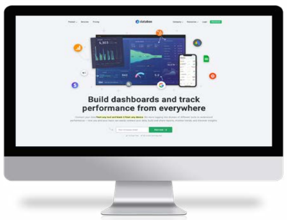
With software you can automate this process.

Other areas of your workflow to consider automating are:

Measurement

Reporting and data aggregation: If your team is spending time each month exporting files and creating reports manually, it might be worth building a unified dashboard in a custom tool like: Tableau, SpotFire, or finding a software platform like SproutSocial.

Use a tool like Databox that pulls all of your data into one place. https://databox.com/



Chatbots

You can use rules and logic to have Chatbots do all the work for you and capture that lead.

Drift is our favourite chatbot tool at the moment: https://www.drift.com/

Schedule meetings

Get a personal calendar tool like Calendy or Outlook Booking to make this automatic and put it in your signatures in your emails and set your availably accordingly.

System integration

Have your systems talk to each other! Integration tools like Zapier can help flow data between the various platforms you use.

Check out our Automation tools list

How to start automating Processes and Workflows

- List what you want to automation.
- List out business objectives.
- Get someone to research and implement.

Action Items

- If you don't already do so, set up email automations to clean up your inbox.
  - View the tutorial.
  - Set up Templates of emails that you send frequently.
  - Set up QuickParts.
- Research marketing automation software and set up your first automation sequence.
- Make a list of regular work you would like to automate.
- Find opportunities to automate processes and workflows in your organization.
- Delegate the research of tools and platforms that could use to automate your processes and workflows.
- Select and purchase tools and platforms and start saving time.

Notes
What emails could you set up templates for?

Invest in Powerful Positioning

Your brand isn't what YOU say it is, it's what people say about YOU.

Your brand is the sum total of feelings and perceptions your customers have towards your business. Every department that impacts the customer experience before, during and after a purchase is responsible for the Brand.

You need to evoke an emotion in your customers' mind when they think of your brand. When a brand makes you feel something, you are more likely to remember that brand when you are looking to buy; and you're more likely to recognize the brand when you see an ad and more likely to think of it when a friend asks for a recommendation.

Your positioning directly impacts each stage of your funnel from awareness, right through to post-purchase. If you nail your positioning and move the needle just a little in every stage, it can create a massive impact for your topline.

When you have a strong brand, you can charge a premium, which has a direct impact on your bottom line.

Your brand positioning statement is like your compass.

Check out Nike's Positioning Statement:

For athletes in need of high-quality, fashionable athletic wear, Nike provides customers with top-performing sports apparel and shoes made of the highest quality materials. Its products are the most advanced in the athletic apparel industry because of Nike's commitment to innovation and investment in the latest technologies.

Brand Positioning Statement

It's not a tagline, it's a guideline for customers in terms of what to expect and for the company in terms of what to do to keep delivering a consistent and on-brand experience.

Step 1.

Before writing your positioning statement ask yourself the following questions:

- What emotions do you want your customers to feel?
- What do you want to be known for?

Create a list of what you want to your customers to say about you when you aren't in the room.
We call it the ideal testimonial.

Step 2.

Call up 10 of your best customers that are in your target zone and ask them:

- What emotions does your brand evoke in them?
- What do they know you for?

Find out how congruent your ideal statement is to how your customers actually explain your brand back to you. Use that information to guide you into building your brand position statement and double down on any gaps.

Write your Brand Positioning statement

When writing your Brand Positioning Statement use the following format:

- Customer – Who's it for?
- Problem – What problem or pain point does it solve?
- Promise – What is the Benefit statement or Unique Selling Proposition?
- Proof – How do you do it?

Now ask yourself: could this describe any of your competitors? If yes, keep drilling it down until you feel that you've carved out the niche that you operate in. You want to always look to grow in niches.

Find a way to be memorable

Find a unique experience that makes an impression and stays in the minds of customers.

You don't't' have to be a giant to build a powerful brand.

Get everyone on board

Meet with the head of every department that impacts your customer experience and ensure that their processes are consistent with the positioning statement. Create a plan to get each department aligned with the Brand Positioning Statement.

Get that compass calibrated and pay attention to your rudder. If you make this part of your process and get each department to review and improve on a regular basis, you'll be steering your ship in the right direction.

Don't go it alone, large companies like Pepsi and Coca-Cola look to agencies to help them with their brand positioning, so if you're finding it hard, give us a shout -we're happy to help.

Action Items:

- Brainstorm what emotions you want to evoke from your customers and what you want to be known for.
- Call up 10 of your top clients in your target niche and ask them what emotions they get from the brand and what they know you for.
- Evaluate what you want your brand to be - versus what it is.
- Create a positioning statement using the format of:
    - Customer – Who's it for?
    - Problem – What problem or pain point does it solve?
    - Promise – What is the Benefit statement or Unique Selling Proposition ?
    - Proof – How do you do it?
    - Drill down your positioning statement to differentiate yourself from your competition.
- Get the whole organization on board, meet with all your department heads and develop a plan to get them all aligned to the Brand Positioning Statement to offer and cohesive and consistent customer experience.

Notes

Congratulations!

Let’s take the time to celebrate that you are over halfway done the course and you are on your way to earning your Marketing Black Belt on the 10 Rules every CMO should follow.

By this point, you might have ideas, questions, or just want a sounding board and that’s FANTASTIC!

A member of my team or I are available to hop on a call with you and talk strategy or how to close the gap from where you are now to where you want to be.

BOOK A CALL

Dominate a Niche

Pinpoint ----------> Dominate ----------> Move to another niche ----------> Repeat

Focusing on a specific niche gives you a huge advantage over your competitors, particularly against giants in your industry with bigger market share, marketing budgets, and lower prices.

Check out our Niche Dominator Worksheet

Here are our 5Ps of Nice Domination

Pinpoint a niche

Before picking a niche and move on, it is extremely important to properly validate. Here's how:

1. Make a list of potential niches.

2. Then rank them based on which ones would attract the best customers and fit most tightly with the product or service that you offer. You'll want to find a niche that has a decent sized universe of potential clients.

3. With your top choice, build a customer Avatar. Specifically, who is the person or group you want to target.

    - How old are they?
    - What's their Job Title?
    - Where do they live?
    - What are their hobbies?

Check out our 7 Problems Every CMO Faces course to develop a customer persona.

Validation Cycle includes Positioning, Proof, and Product.

Product

Thinking about what you can offer this new segment. What unique value do you bring?

Positioning

Crafting a marketing plan. What do you need to say and where should you be targeting your niche?

Proof

Validation – call a few of the target customers that are target niche. Cold call a few people in your target niche that aren't customers.

Ask them what is most important to them? What do they struggle with? What keeps them up at night? Does the marketing messaging you have crafted resonate with them? Do they value the unique product or service offering you came up with? Would that offering be something worth switching to? What would?

Get the data you need to evaluate if you have the right plan, as you go through the positioning, iterate the positioning, iterate the product offering and if you need to, then abandon the niche and restart the cycle with your second pick.

Once you've validated and you feel you have nailed down the product and positioning, it's time to Pivot.

Pivot

You'll go through a plan to where you transition into a new niche. Rather than redesigning your entire brand and website, here's a first step as proof of concept:

Build a page on your website dedicated to your new niche. This page should look like a new home page but targeted at your specific niche, it should have everything you need to communicate the unique benefits you offer and have a clear call to action.

Build a paid marketing campaign testing this new niche and use this page as the landing page for that campaign.

This is one example that you can execute your proof of concept any way that best makes sense for your business model.

Other resources:

- How to create an effective buyer persona
- How to pinpoint your niche
- 5 Genius ways to ensure niche domination

Action Items:

Download the Niche Dominator Worksheet

Go through the 5Ps of niche domination for your organization:

- Pinpoint
- Product
- Positioning
- Proof
- Pivot

Notes

Build a Solid Referral Funnel

Referrals are one of the best sources of new leads for your business.

Ask yourself:

- Do you ask your customers for referrals?
- If yes, do you have a process or system around referrals?

Before even thinking about asking for referrals, you need to focus on excellence. You must impress your customers and deliver something unique to get them into the referral mindset in the first place.

Go to our Referral Pipeline Builder

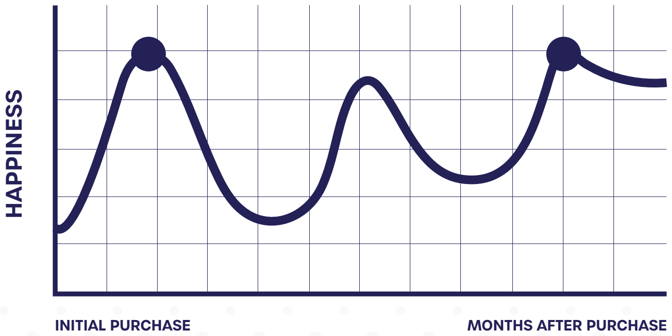
Here are our 4 things you'll need to build a solid referral funnel:

1. Nail the timing
2. Present a clear ask
3. Reduce barriers
4. Systemize the process

Nail the timing

Map out customer value journey. Once a new customer starts working with you, figure out where in the lifecycle, are those highpoints; the times where the customer is most happy with you. Those emotional high points are the perfect time to ask for referrals.

They can be right when the customer makes the initial purchase or months down the road when they see the results.



Present a clear ask

State in words what action you want someone to take to send you a referral.

- Connect via email
- Invite to an event
- Free one month trial
- Give address for free gift

Don't just ask your customer for referrals, specifically communicate to them what action you'd like them to take. When you paint a clear picture in their head of what a referral looks like, and what you're looking for, you're much more likely to get them to act.

Reducing Barriers

This process is all about minimizing the cost and maximizing the reward for sending you a referral. Start by having a conversation, open with something personal, short, easy to respond to, and doesn't require a huge commitment.

The goal is to get an initial response. Once that initial contact is made, the transition to asking for a referral is much more seamless; their "walls are down" and it's more like asking a friend.

Keep in mind, for someone to give a referral, it must be a win-win situation. If you can create the perception that they're doing their contact a favour by referring them to you that's the ideal situation. You can do all sorts of things like providing incentives for your customer and their contacts and this can help.

The most important thing is that your customers know what problems you can solve for them and that they can trust you to deliver value to their referral in that first encounter.

Go to the Referral Pipeline Builder

Systemize this process

Referrals are a personal thing, so how do you systemize such a personal thing?

Here are the steps to systemize your referral process:

- **Train** your sales or account executive people on this process and how it's done.
- **Activate** your team by providing reminders in your CRM or workflow management tool. Automate the first email and send customer replies to the sales rep's inbox for follow up.
- **Template** discussion points, email language and decision trees.
- **Track** your activities and success rates. What doesn't get measured, doesn't get done.

Action Items:

- Download the Referral Pipeline Builder
- If you don't already have a clear Customer Avatar AKA Ideal Customer Profile or Buyer Persona, go through the exercise of creating one.
- **Nail the timing**: Map out the emotional highs and lows of your customers' journey and pinpoint the emotional high points where you will ask for a referral. {present a clear ask: State in words what you want your customers to do to give a referral
- **Reduce barriers:** Write a client facing, statement that states who you can help and what problem you can solve. Drill it down until it is clear and concise.
- **Systemize:** Create templates for discussions points, emails

Notes:

Build and Activate a World-Class Team

Take a second to look at the team you have and rate it out of 10. Better yet, how do you think your competitors would rate your team? How would your customers rate your team?

We're going to go over how to build a world class team that any competitor would be jealous of.

Start with building trust and stop micromanaging. Why? Micromanaging hurts your employees, which in turn hurts your business. It creates disengagement amongst employees and decreases a sense of morale, creativity and autonomy. There are negative effects for both employees and employers when it comes to micro management.

According to Trachtime24, **negative effects on employees include:**

- Increased stress, frustration, and burnout.
- Decreased productivity.
- Poor health and mental well-being.

While employers can feel the following negative effects from micromanagement:

- Stifling of creativity and innovation.
- Not scalable.
- Damages employee trust.
- Increases turnover.

To attract world class talent, you need to foster a world class environment. To do that, a culture of trust is key. In fact studies have shown that companies that embrace a high "trust culture", (where employees are treated as capable professionals) find that measurable financial performance is greater. **(Thrive Global)** World class people want to surround themselves with other world class people to keep learning, improving and getting better.

Here are SIX qualities to look for in world class talent.

1. **Smart**
   The person needs to be smart; you should want people who can add brain power to the organization, no matter their position. Even the most entry-level jobs should have motivated people who can think on their feet.

2. **Honesty**
   Choose people you can trust and that won't embellish the results, sugar coat the bad news, or be a "Yes" person.

3. **Fearless**
   Choose people who are willing to speak up, take calculated risks, and able to admit when they make a mistake.

4. **Strive for excellence**
   Look for people that pursue excellence in other areas of their life, no matter what that may look like. You want people who have demonstrated in their actions that they work at being great at what they are passionate about.

5. **Passionate**
   Look for people that have passion. You want to have positive people on your team that will give you energy; people who spend their free time learning and improving their skills and abilities.

6. **Self-Starter**
   Candidates should be self-starters. They should be able to evaluate their own objectives and set their own priorities and manage their own expectations as well as yours.

The regular factors of education, experience and certifications that usually drive up the cost of an applicant, should be less of a focus when you are looking to hire a world-class team.

These can be helpful to clarify if someone has the basic skills that you need. But instead look to hire for X-Factor qualities like intelligence, ambition and drive and train those people up for the necessary skills. Skills can be taught, but a person's character can't.

For more technical positions, you can consider having the applicant's take a paid test to evaluate their knowledge and abilities for the position they are applying.

Activate the team

Now that you've built the team, you need to activate the team. Here are SIX things your working environment needs to activate your team.

1. **Autonomy**
   World class people don't want to be micro-managed; they want the opportunity to shine and be appreciated for when they do.

2. **Appreciation**
   They want to be successful and get results. When they do, be sure to communicate how much you value them. Be specific and find out what compliments resonate strongly with them. What do they care most about being good at? Reward and appreciate them for those things and they will naturally work harder.

3. **Flexibility**
   Give them the flexibility to work in a way that best suites them and gives them the ability to get the best results. This could mean working from home, conducting work outside regular office hours, or something else entirely.

4. **High-Level (big picture guidance)**
   Provide high-level guidance and let them work out the details of how they will get things done. In other words, focus on the big-picture and let them figure out the tactical plan. This will take you out of the micro-management mode and make your employees take ownership of the project.

5. **Training**
   Remember, we hire for the X-Factors and train for skills. That means there will be a bit of a learning curve along the way. Make sure to have the right onboarding process in place to get them up to speed as quickly as possible. It is important to provide them with access to continued learning opportunities to improve their skills and abilities to keep them engaged.

6. **Process**
   The bow that ties it all together. Whether you create your own, outsource, or use a CRM system, you need to have proper documentation for every major area of operation. This provides your team with structure, consistency, and scalability.

Check out our Process Documentation Tool

Don't settle for mediocrity when it comes to hiring. If you compromise on people, you are fighting a losing battle right out of the gate.

Other resources:

- **When good people leave**

Action Items:

- Review your current team and environment.
- Go over the hiring process with your HR team or the person responsible for HR and indicate the qualities you are looking for in candidates that go beyond education, experience and certifications.
- Develop interview questions accordingly to those qualities.
- Activate your team by:
    - Creating a culture of autonomy instead of micromanagement
    - Find out what ways your team likes to be appreciated
    - Open the door to more flexibility, have an honest conversation with your team and find out if there is a small change that would make them happier or would suit their lifestyle better.
    - Keep things high-level and let your employees take ownership of projects.
    - Make it abundantly clear that training and education is of utmost importance to the organization and go further and make sure to remind them periodically. Let them know what the procedure is for requesting permission to have the company pay for a course or to take time off work for training etc.
    - Create a process – download the **Process Documentation Index** and watch **CMO Problem #3: You're relying on People as a Process** from our CMO Problems series
    - Create a process – create processes for hiring and other steps for creating and developing a world-class team.

Notes

Give Clear Marketing Briefs

Get more out of your Marketing agency with amazing marketing briefs.

What should you include in your brief? Without doing the homework, you cannot provide the details and the numbers that will help you and your marketing agency succeed.

Here is our list of things you should include in your marketing brief:

1. **Your objectives**
   State the objectives of the project and state a short background on how it came about.

2. **Your Story**
   Tell the agency about your company. Not necessarily your history, but who you help, what problems you solve and how you do it. Also include who your top competitors are and what (you believe) your competitive advantage is.

3. **Your Target Market**
   The agency will want to know your customer avatar (also known as your Target Audience or Buyer Personas) – who they are, where they are located, what's important to them. As well as your Average Customer Value – 12 month and lifetime value.

4. **Your desired outcome**
   What do you want your agency to deliver? What is it you want to drive? Is it traffic, awareness, leads, customers, etc.? Do you have targets in mind? Like number of leads per month, cost per lead, cost per application. It especially helps if you can reverse engineer what an outcome is worth to your business. Then you can set a target campaign ROI.

Example:

If a customer is worth $5,000 and you get one new customer for every 10 qualified leads, you should be able to pay $500 to get a new lead. If you target a 3-to-1 ROI, you should be able to pay $170 for a qualified lead.
This is a wonderful time to walk the agency through your funnel. No matter what the objectives are for the campaign, you want them to help you get more customers in the long run if they understand what the steps are in the buying cycle, they are more likely to come to you with ideas in the future.

5. **Your details**
You should touch on these major details.

- Your budget
- Timeframe
- Any non-negotiables
- Tell them you will send the Brand Guidelines and
- Make sure to leave the meeting with defined the next steps and a timeline

6. **Your inspiration and motivation**
Pump the agency up by explaining to them why this matters to you personally, why you chose them and what it is you see in them as an agency. Give your agency as much freedom as possible.

Hire an agency because you want access to their marketing knowledge and experience. You won't tap into this if you are too prescriptive in your directives and constraints with how you deliver the brief.

A good agency is an extension of your company.

Other resources:

[Getting the most of our your creative agency]

Action Items:

- Create a new marketing brief template with the following items:
    - Objectives
    - Your story
    - Your target market
    - Your desired outcome
    - Your campaign/project details
    - Your inspiration and motivation

Notes

Plan Your Ideal Week

What would you do with an extra 4-6 hours a week to further the cause of your marketing department? How much would you be willing to invest if you were guaranteed to get those 4-6 hours per week?

It all starts with planning your ideal week.

Here is our process for planning your ideal week and gaining back time in your calendar.

3 Steps to take to gain back your time:

1. Track your time for 2 weeks.

    a. Get a timer, set it for 15 minutes intervals, then jot down a short description of what you did after the timer goes off in a spreadsheet document. Be brutally honest with yourself and write down exactly what you did - so don't inflate your time or lie. Do this for 2 weeks.

    b. Once you have all your notes written in a spreadsheet tool, add a new column and start to categorize your time and tasks together.

2. Condense and offload, outsource, automate or delegate.

    a. Start by writing down a list everything you do each week, write down anything that takes at least one hour of your time a week. This can be pulled from the categories you created in Step 1.

    b. Put an "X" beside any item that you don't want to be part of your ideal week. Those are your target items to download or offload.

    c. For each "X" item, ask yourself.

        - Does this need to be done?
        - Who else on the team can do this?
        - Can we automate it? (See CMO Rule #4: Use automation)

    d. General rule, if it saves you at least 2 hours per month and it costs less than a ¼ of the time it saves you based on your effective hourly salary, then buy it! Create a plan, identify specific action items to get things off your plate, then add them to another column in your spreadsheet document, then finally prioritize your list based on what will save you the most time and what's the easiest to implement.

3. Design your ideal week.

   a. Take the list of remaining weekly tasks/activities from Step 2 and add to it all the things you wish you could do if you had time. You should be left with a wish list.

   b. Pull out a weekly scheduling tool and start plugging things in. Try to think in 90-minute blocks of times as much as possible. Doing work in blocks of time is more productive and produces higher quality end results.

Quick tips:

- Schedule as many regular team meetings on the same day as you can
- Add a few blocks for meeting prep or thinking time
- Block off time for Head-down concentrated work
- Don't forget to add non-work items.

Other resources:

Plan your ideal week

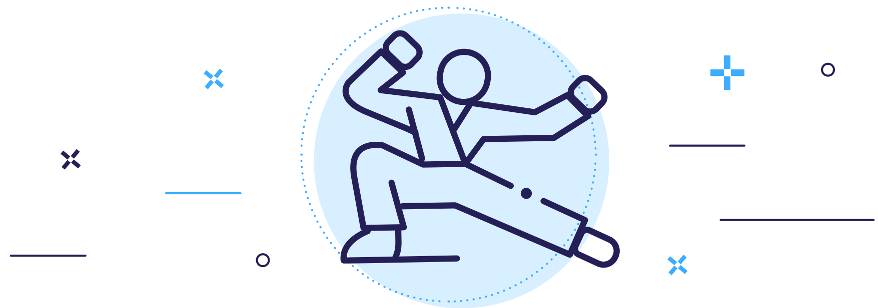
Time-Tracking: A guide to boosting productivity

Action Items:

- Pick a 2-week period to do this exercise
- Set a timer for every 15 minutes and track your time for those 2 weeks
- Review what you're doing with your time and group items together
- Offload items/activities - see where you can offload some of your items
- Design your ideal week – create your ideal week in blocks of time and don't forget to include non-work items as well.

Notes

Congratulations on earning your Black Belt for our 10 CMO Rules that every marketer should follow to be successful!



Did you know that only 3 to 12% of people complete any online course they start, that means that you just went further than 90% of the people that signed up for this training. If that isn't worth celebrating, we don't know what is.

If you've reached this point, it tells us that you are invested in your growth as a marketer and want to see your organization thrive. Book a free strategy session with us now while the momentum is pumping.

Let's talk strategy

Marty Fisher

Founder of Sherpa Marketing
and Creator of The Marketing Dojo.

Want More?

[Take our 7 CMO Problems course]

In this series you'll go through the top 7 problems that CMO's face today and how to overcome them.

The lessons include how to get more qualified leads, how to measure your ROI on your marketing efforts, creating processes, building the right reports, creating content that your audience is looking for, optimizing your website, and building the ultimate marketing strategy that leaves no stone unturned or holes in your funnel.