



THE  
**CMO**  
CLUB

**THE CHIEF**

**MARKETER'S**

**PLAYBOOK**

A PRACTICAL  
GUIDE FOR

**NEW CMOS**

# THANK YOU!

WE COULDN'T HAVE MADE THIS RESOURCE WITHOUT THE HELP OF A WONDERFUL TEAM OF HUMANS. WITH THANKS TO:



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Editor



**MICHELLE CHUANG**  
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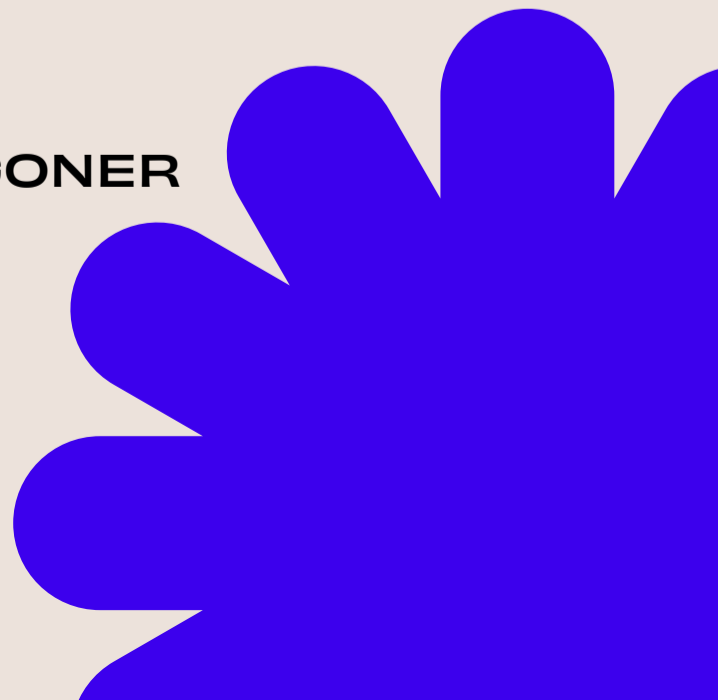
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## THE FASTEST WAY TO FAIL AS A NEW CHIEF MARKETING OFFICER IS TO THINK THAT YOUR JOB IS JUST "DOING THE WORK."

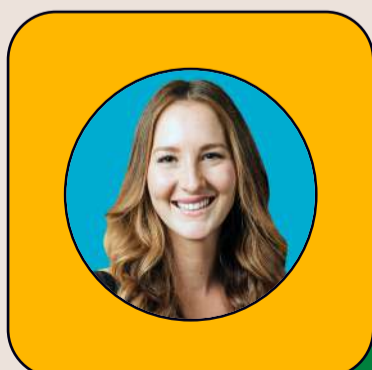
This is one part of it, but it's also about making sure the business knows why you're doing the work and getting buy-in and resources for the work from the rest of the C-suite, all while ensuring your team and everything else isn't falling apart.

*Of course, all of this is far easier said than done.*

Enter our Chief Marketer's Playbook, a practical guide for new CMOs or experienced CMOs at new organizations. To help you find your footing, understand the business, and succeed in your new role, I invited four marketing experts to share valuable insights and actionable steps on how to lead the marketing team, collaborate with stakeholders, develop a sound marketing strategy, and much, much more.

As you read through the following chapters and apply their expert advice to all parts of your work, I hope that you will keep one thing in mind: the role of a good marketer is never fully accomplished, not even for those at the top. This discipline moves fast—seemingly faster than ever these days—and the principles and tactics shared in the following paragraphs can help you continue to work towards greatness in your career.

And so, we'll start at step one. You've made it this far, and with this playbook in your pocket you'll be adequately armed for all that comes next.



Editor of The CMO  
**STEPHANIE HOOD**

**Stephanie Hood** is an experienced marketing professional and Editor of The CMO. With nearly a decade spent as Marketing Manager at Discover Holidays and Executive Editor at VIVA Lifestyle & Travel, she built her career leading editorial and marketing teams and strategies that turn six-figure budgets into seven-figure profits. She now enjoys connecting with the world's top executives to learn their secrets to business success, and shares those insights on The CMO with her community of like-minded professionals.

# CHAPTER 1



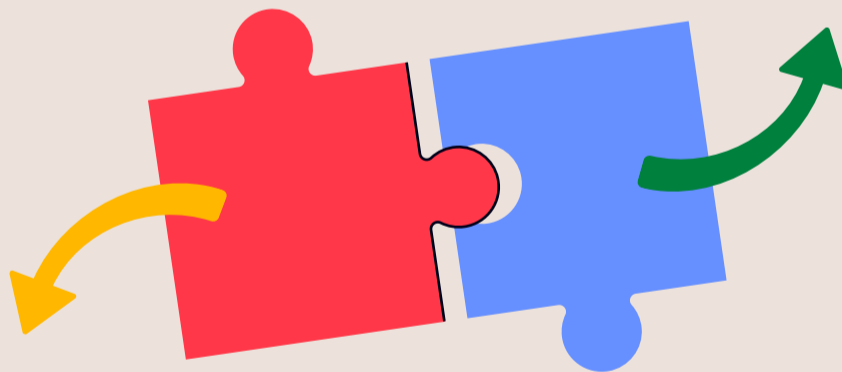
## LEADING THE MARKETING TEAM AND COLLABORATING WITH STAKEHOLDERS

## **STEPPING INTO THE ROLE OF CHIEF MARKETING OFFICER (CMO) FOR THE FIRST TIME CAN FEEL LIKE YOU'RE PLAYING A HIGH-STAKES GAME WHERE THE RULES CONSTANTLY CHANGE.**

From corporate dynamics to competitive landscapes and the occasional internal politics, it can be a wild mix of creative exploration and technical compliance—all whilst avoiding any landmines.

So, how do you master such a difficult dance? By grasping these intricacies without becoming entangled by them. As established professionals know, success in the C-suite hinges on two things:

**1. Authentic relationship-building**

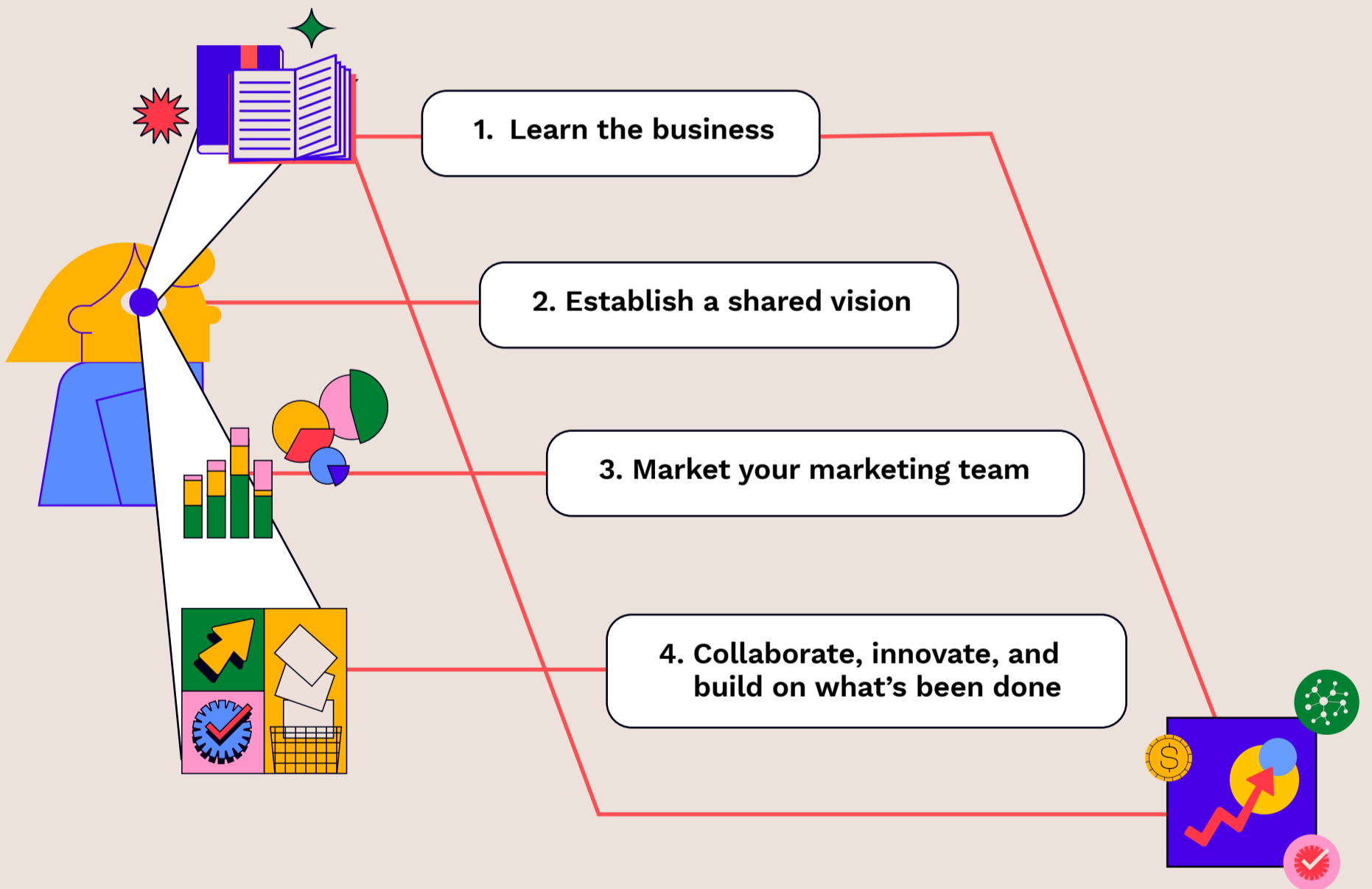


**2. Open communication**

It's about deciphering the motivations and perspectives of diverse stakeholders within the organization and promoting collaboration and consensus-building within your team.

For a new CMO, the mandate is clear: Elevate the brand, drive sales growth, and create value while upholding the highest leadership standards. By remaining neutral and focusing on the organization's collective goals, you can skillfully navigate the intricate web of internal politics while leading your marketing team to new heights.

As someone who has done all these things and climbed the corporate ladder, let me share how you can successfully immerse yourself into a new organization by balancing strategic insight, data-driven decisions, and fostering a culture of innovation and collaboration.



## I. LEARN THE BUSINESS

The initial weeks in a new company aren't just about team alignment or target-setting; they're an opportunity for you to dive deep into the business ecosystem beyond foundational knowledge. It's crucial that you:

- Understand customer needs
- Identify unique selling propositions
- Grasp the distinctions of products or services

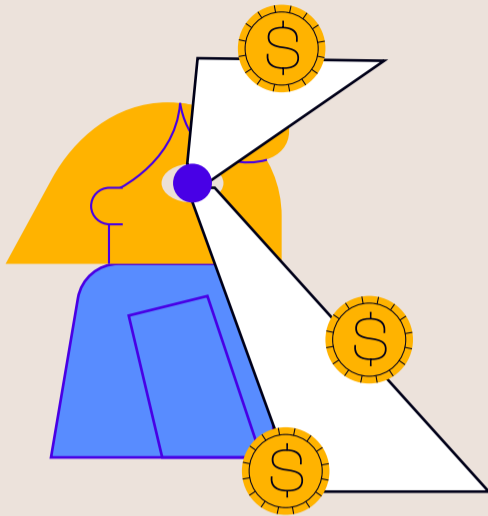


To do this, chat with the customers, dig through feedback, carefully examine the lifecycle of your product, and take a magnifying glass to past market strategies. I also highly recommend that you set up one-on-one meetings with various department heads and the rest of the C-suite to pick their brains and get their honest take on the company's current standing.

Understanding the brand's unique characteristics, its competitors, and the volatility of the market will all help you to build strategic relationships with primary stakeholders like Sales, Product Development, and Finance. Your job is to transform an integrated marketing strategy from mere theory to reality and create positive change momentum.



## 2. ESTABLISH A SHARED VISION



As a leader, establishing a shared vision is not just good for organizational alignment—it's mission-critical to your success. To achieve this, you need a compelling vision that resonates and must be communicated and instilled effectively across different organizational sectors.

This starts at the top, where you've got to turn that vision into real-deal results. A keen focus on financial outcomes should align with the rest of the C-suite's and board members' priorities. After all, you're working with CEOs, CFOs, and other titles whose primary focus is to increase sales and revenue.

The best way to communicate your vision and get buy-in from those principally concerned with financial outcomes is to back up your arguments with data-driven insights. This can look like:

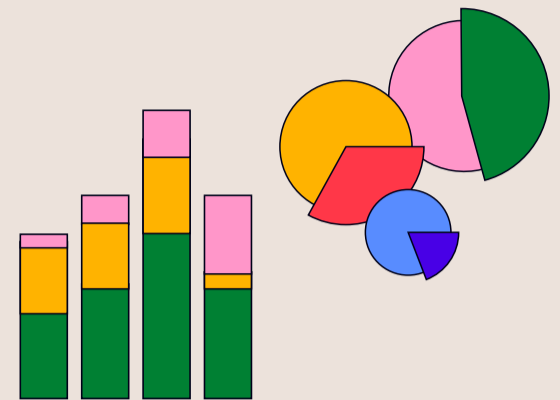
- Leveraging AI and purchase data to provide product recommendations or add-ons
- Basing new product launches on predictive analytics of what customers want next
- Using data analytics to personalize your campaigns and optimize your ROI

This calls for a blend of art and science, a balancing act led by the tech-savvy CMO. Your analytical proficiency allows your team to harness emerging technologies into data-driven insights, which can then be used to tailor your marketing strategies with personalization, positioning, predictability, and performance.

Your strategies—emphasizing brand purpose, proactive pricing, tech investments, and analytics—ensure growth in the digital age, executive buy-in, and team alignment toward the shared vision.

### 3. MARKET YOUR MARKETING TEAM

With an understanding of the business and a shared vision in place, there's one more main duty that you need to prioritize as CMO: marketing the marketing team itself.



As you arrive with rich experience and insights, it's paramount to acknowledge the marketing team's past—the structure, strategies, and symbiosis of the group within the organization. Recognize that there are the visionaries, planners, and implementers on the team. Your role encompasses leadership, motivation, inspiration, and support. While the team might desire direction, they also hold precious institutional knowledge, and it's wise that you trust and respect this.

However, it's a reciprocal relationship; the team seeks a reliable advocate to champion their cause, obtain essential resources, and enable their path to excellence. There's also a high-level, strategic reason why the CEO brought you into your role. This dual responsibility is crucial for your success in leading the marketing team and establishing the CMO role within the organization.

Here are a few ways you can empower your team and receive their trust and support:

- Encourage open feedback, perhaps anonymously, to start
- Identify areas of improvement in communication channels
- Optimize workflows to support effective collaboration
- Obtain more resources like budget, training, or advanced tools
- Promote continuous learning and development opportunities
- Create opportunities for recognition and celebrate shared successes

Promoting the marketing team is more than a strategy; it's a commitment. It revolves around the understanding that a CMO's triumph is closely linked to the team's achievements. The journey entails elevating the brand, driving growth, and nurturing an energized, inspired, and high-achieving team.

## 4. COLLABORATE, INNOVATE, AND REFINE



As an executive joining a new company, you'll quickly learn your journey is not confined to a fixed path but one characterized by collaboration, innovation, and continuous refinement. Particularly when a company recruits a new executive from outside the organization, the goal goes beyond just filling a role; it's about catalyzing transformation for the better.

Having stepped into this role, there's a clear mandate—to enhance the organization. Often, success metrics encompass increased revenue, improved EBITDA (earnings before interest, taxes, depreciation, and amortization), and heightened organizational performance. These objectives will be common themes throughout this eBook, as they represent a commitment to the growth of the organization.

Achieving these goals hinges on the capability to:

- **Collaborate:** Recognizing that success is never a solitary endeavor. It's vital to harness the collective intelligence of your team, other departments such as sales or product, and key stakeholders like the C-suite, investors, or board members.
- **Innovate:** Not settling for the status quo, challenging existing boundaries, and instead of following industry trends, setting them. It's important that you embrace new technology and encourage your team toward out-of-box creativity.
- **Refine:** Not every strategy will produce immediate outcomes, but the capacity to glean lessons from challenges distinguishes the approach and helps you to evolve through experience. Be ready to shift when required, modify strategies rooted in data, and hone the approach over time.

A new CMO is responsible for creating positive change and the privilege to embody influence that is well beyond the authority of a C-suite title. It's about imprinting a lasting mark on the organization's growth trajectory and the marketing team's motivation and making an impact that resonates in financial metrics and shapes the organization's culture.

But how do you implement your marketing strategy? Keep reading.



## MICHELLE CHUANG



**Michelle Chuang** is a seasoned professional with over 20 years of leadership experience in a diverse range of companies, spanning from small and medium-sized businesses to large Fortune 100 enterprises. Throughout her career, she has demonstrated a remarkable ability to drive growth and profitability through strategic decision-making and innovative solutions. Michelle's expertise lies in effectively navigating complex business landscapes, leveraging her extensive knowledge to deliver impactful results and establish enduring partnerships.

# CHAPTER 2



## CREATING AND IMPLEMENTING YOUR MARKETING STRATEGY

You've got fresh ideas that you're eager to implement and ready to hit the ground running. The company may or may not have seen significant growth but also experienced some evolving challenges that—with your oversight—can be turned into strengths.

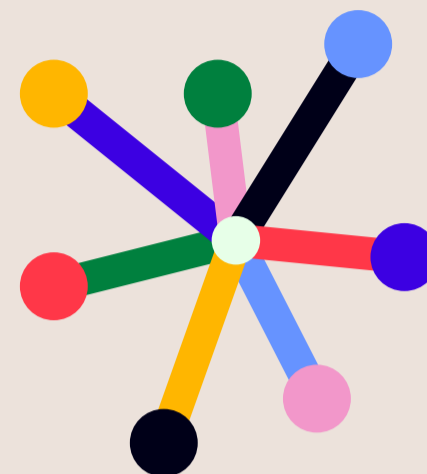
As you bring in your existing toolkit and try to understand the current landscape in the company, the stakes are high, and every decision impacts KPIs.

**SO, HOW DO YOU ORGANIZE THE MARKETING PLANNING PROCESS EFFICIENTLY TO GET THE JOB DONE AND ENSURE THE NUMBERS ARE MOVING POSITIVELY?**

Before any new CMO can start strategically devising a new marketing plan, it's crucial to analyze what has already happened so that you can understand what was successful and identify opportunities. Time is of the essence in any role tied to revenue, so being strategic about your approach is essential. In this chapter, I'll outline five key areas a new CMO should focus on when creating and implementing a marketing strategy at a new company.

## I. DETERMINE GOALS, KPIS, AND OPERATIONAL OWNERSHIP

The first step is determining current goals and KPIs and how they are being measured. This will help you identify what success looks like to the company, and it's equally important that you know who is responsible for achieving each goal.



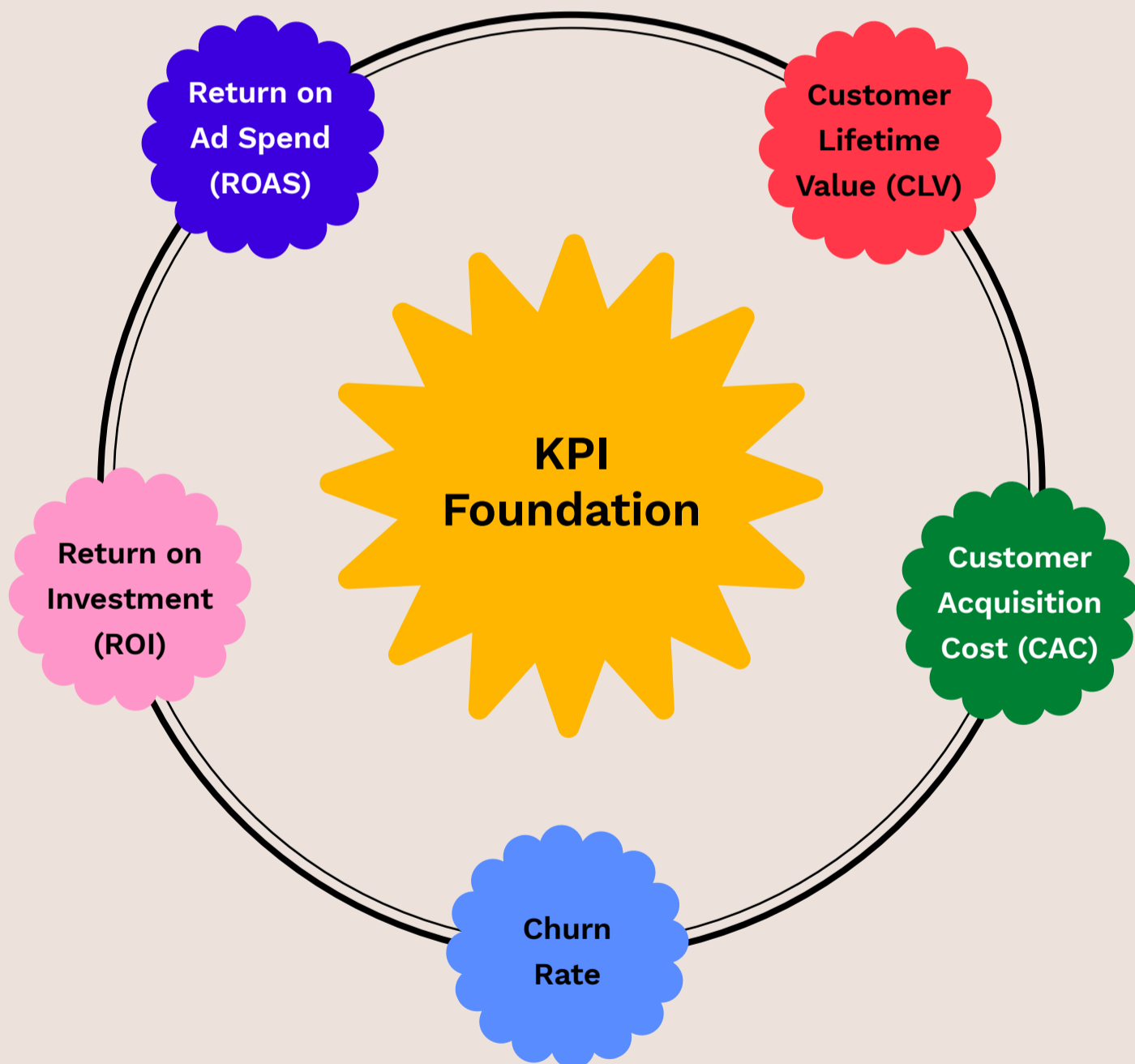
For example, does the company use Customer Lifetime Value (the amount each customer is worth to the company long-term) as a primary measurement for success, and is every department a stakeholder in this metric? Sometimes, the onus falls solely on marketing and sales, and you may find yourself responsible for results outside your domain.

Understanding the company's forms of measurement and operational ownership allows you to focus on primary goals while simultaneously working on other areas that need improvement. In these secondary areas, I recommend you lay the groundwork for collaborative ownership so that you can communicate early on if changes need to occur.

In a later chapter, we will dive into setting big quarterly goals (see *5 Tips for Managing a Complex Marketing Tech Stack*). For now, you may want to take notes on a few high-level metrics, such as:

- **Customer Lifetime Value (CLV):** Provides clues to the effectiveness of prior marketing efforts and the stickiness (i.e., retention) of the product in the market.
- **Customer Acquisition Cost (CAC):** Ensures positive financial health and builds confidence in the best channels for acquiring and converting customers.

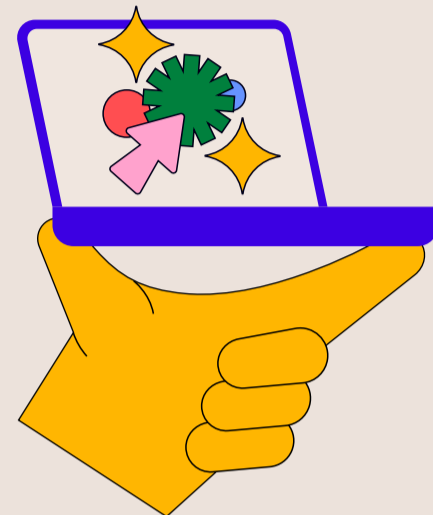
- **Churn Rate:** This impacts recurring revenue, so you must understand user behavior to make data-driven decisions that enhance customer retention.
- **Return on Investment (ROI):** Shows how much revenue from each marketing campaign has been achieved, helping you optimize budget and resource allocation.
- **Return on Ad Spend (ROAS):** Compares how much revenue on particular ad programs has been made with the overall spend on those ads.





## 2. EVALUATE TRACKING AND ATTRIBUTION MODELS

Once you've determined the company's goals and forms of measurement, it's time to evaluate its tracking and attribution models. For some tactics, this can be tricky, as it depends on how far back the model goes and whether there's a Customer Relationship Management (CRM) system in place to track your Marketing Qualified Leads (MQLs) after they've been passed to sales.



The goal here is to track leads, specifically those that convert to revenue accurately. To perform an attribution health check, first, see where the leaks in the process are or how healthy the tracking is across the entire marketing program. Here's how to do this and create an optimized tracking and attribution model:

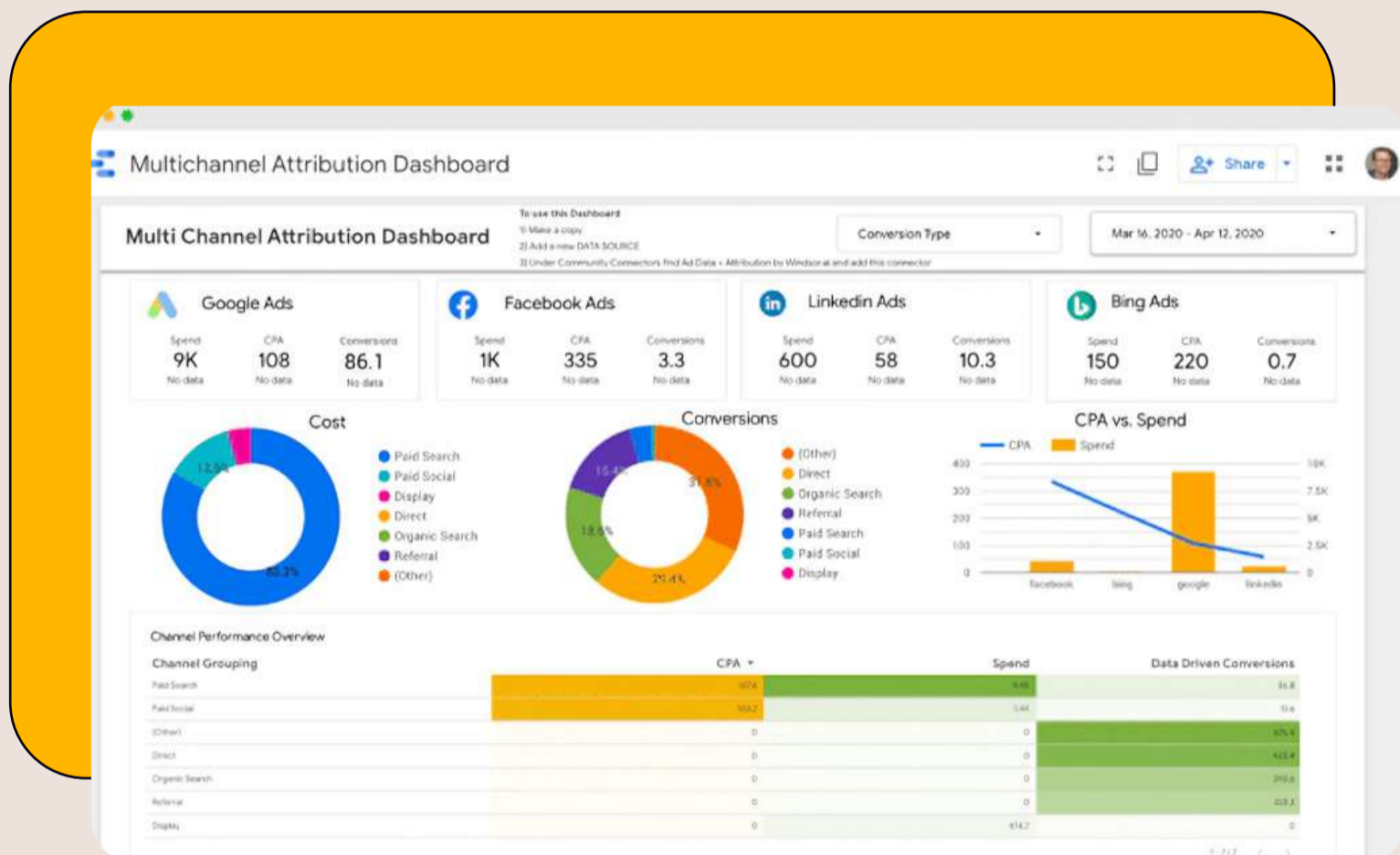
- **Consider the customer journey, and user flows**

Is the attribution (the key to where the conversions are coming from) set up to follow the entire customer journey? The sales cycle length will determine how much tracking and attribution you need to set up. For example, a product such as software has a long sales cycle, so it requires tracking everything from first-click attribution to a customer installing the software.

You also want to continue monitoring user flows within the product, as there's potential for customer churn at some point in the user journey. The best CMOs follow the entire user journey for a lot of reasons, including ways to market to future users, marketing materials to support the education of existing users, and knowing where there might be areas in the process to send marketing messaging to customers as they explore the product to avoid churn.

- **Create a visual guide to track conversions**

Is there a visual guide to track the conversion funnels and user progress at every step? High-level CMOs are often visual people who need to see performances at a glance daily, weekly, and monthly. Luckily, performance or business intelligence dashboards and out-of-the-box software such as **Looker Studio** by Google or **Adverity** can be used to visualize performance quickly.



- **Optimize your retention tracking**

What is currently being done to make improvements for retention? With SaaS success based on subscriptions and recurring revenue, customers need to be sold to and resold throughout the life of their subscription. The existing customers are where businesses make their money. It costs five times more money to acquire new customers than to keep existing customers, so this piece needs to be locked down before you can even look at acquisition.

Understanding where the drop-offs or successes are will give you an idea of where to spend the most time initially. This is one of the most critical parts of the analysis, identifying the leaks early on, maximizing revenue, and growing the Annual Recurring Revenue (ARR).



- **Fix issues with attribution and conversion tracking**

The right tools are essential when considering attribution. A sophisticated solution like **MixPanel**, **Heap**, **Amplitude**, or similar would be ideal. If the company still relies on spreadsheets, solving the tooling issues to give you a dashboard of data and understanding the user journeys would be a top priority. Is Google Tag Manager properly set up? Is the tracking and attribution in the Email Service Provider (ESP) working correctly and giving an accurate read on opportunities?

Test and update conversion tracking codes in every tool used across Google Tag Manager, Google Analytics 4, Google Ads, Facebook Ads, LinkedIn Ads, ESPs, landing page software, and other areas requiring adequate tracking.

### 3. PLAN MARKETING BUDGET AND RESOURCE ALLOCATION

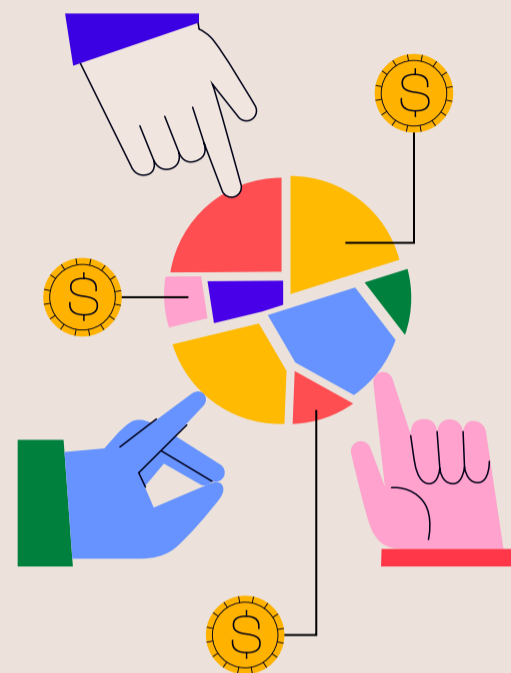
Now that your marketing spend is being looked after with adequate attribution tracking, you can focus on the marketing budget and how resources are allocated to achieve your goals.

There are costs and benefits to spending time across a wide range of initiatives, but the goal is to grow Monthly Recurring Revenue (MRR) and increase Annual Recurring Revenue (ARR) for the company. Find out what is working now and make decisions on how to allocate resources best to maximize opportunities in the future. There are a few ways to do this:

- **Consult agencies and specialists**

Agencies and specialists can be a helpful resource in getting farther faster. Especially if your internal team is small, working with experts in specifics like Google Ads or Facebook Ads can help you set up your campaigns, monitor them, and make changes as needed to ensure they perform at their best. They'll also be at the forefront of platform changes so that you can implement changes suitable for your campaigns faster than your competitors.

If the agency is priced and committed in a way that will grow as your marketing programs scale, that's the type of partnership to look out for. Are your agencies working for you, or are you working for your agencies? A true partnership is an extension of your team and is motivated by scaling your programs because your revenue is growing from their expertise.



- **Improve communication gaps between departments**

An often underutilized opportunity to grow revenue and responsibly allocate budget within SaaS organizations is enforcing a solid feedback loop from other departments to marketing. Sales should regularly communicate specific pain points and successes in winning or losing clients. Customer Service should share hiccups in the user journey, and Development should take ownership of the product roadmap if there is high churn.

This benefits beyond retention marketing because marketers can gain knowledge of the pain points users face that the software solves. If there's an education gap, you can allocate resources to create content that answers potential customers' questions, and if Development communicates new features, you have the opportunity to create ads announcing enhancements that are coming down the pipeline.

## 4. SELECT YOUR ACQUISITION CHANNELS

Keeping your marketing and sales funnel in mind, you can start to consider the best acquisition channels. Knowing how sales and marketing contribute to conversions or installs will give you an idea of where the handoff occurs and how to optimize the full funnel for growth success.

When you know your customer persona and target market, acquiring new customers and optimizing for a longer-standing relationship with them is the key to growth. Your media mix should be a healthy blend of organic, paid, partnerships, and content marketing, though it can also include additional channels like employee advocacy and affiliate marketing.

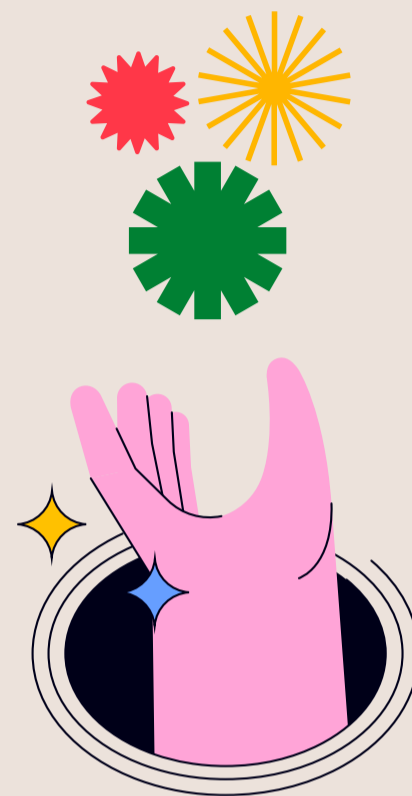
- **Organic**

Organic marketing refers to the tactics you employ to naturally attract and engage your audience without the direct cost of advertising. This approach leverages high-quality content, search engine optimization (SEO), social media engagement, and other methods to build brand awareness, foster relationships, and ultimately drive conversions over time.

The importance of organic marketing lies in its cost-effectiveness and long-term value. It helps establish a brand as a thought leader in its industry and creates a loyal customer base that is more likely to return and advocate for the brand. While time-consuming, organic strategies significantly enhance a brand's visibility in search engine results, making it easier for potential customers to find the business online.

- **Paid advertising**

Unlike organic marketing, which builds a sustainable presence over time, paid advertising seeks immediate visibility through financial investment. This is where your Facebook Ads and Google Ads can come into play, leveraging the advice of the aforementioned agencies and specialists to optimize ROI.



When you're putting money behind a tactic, make sure you're using insights from customer data as much as possible. Consider the demographics and psychographics of your audience like their interests, behaviors, and where they spend their time online. This knowledge ensures that paid advertising efforts are directed toward the platforms where the target audience is most active and engaged, thereby increasing the likelihood of the ads being noticed and acted upon.

- **Partnerships**

Partnerships can be a powerful acquisition channel for SaaS companies, offering opportunities for growth, market expansion, and enhanced product offerings. Not all SaaS companies are prepared to handle partnerships, but there are a few types you can consider:

- **Technology partnerships:** Is your software equipped to handle integrations? A partnership between two SaaS solutions can strengthen the value of both solutions, making them more attractive for customers to use over others that don't offer more enriched functionality.
- **Agency partnerships:** Does your software warrant advertising or branding agencies to want to suggest the solution to their clients? The agency might look like heroes to their clients if it can make their jobs more efficient or save money.
- **Influencer partnerships:** Is someone with a strong personal brand working in the role or industry your software caters to? You may want to consider a partnership with this individual, trading payment for exposure to their audience that aligns with yours.

To effectively pull off a smooth partnership, you may want to consider assigning a dedicated account manager to manage the relationship. They can join the agency staff on demos, support the client in onboarding, and be an internal company representative to influencers.

- **Content marketing**

Content marketing is crucial in the SaaS space, and it can lead to significant traffic acquisition. You should strive to create content designed for each stage of the marketing funnel:

- **Top of the Funnel (ToFu):** For the awareness stage, share blog posts, infographics, social media content, educational videos, and eBooks that provide valuable insights and information on general topics related to your industry.
- **Middle of the Funnel (MoFu):** For the consideration stage, share case studies, product comparison guides, webinars, whitepapers, eBooks, and blog posts that dive deeper into topics and provide in-depth analysis or research.
- **Bottom of the Funnel (BoFu):** For the decision stage, share customer testimonials and detailed case studies that prove the value of your product. Free trials or consultations, special offers, and detailed product information are also effective.
- **Post Purchase:** To increase loyalty and advocacy, share onboarding materials, user guides, and tutorials to help customers get the most out of their purchase. Regular updates, newsletters, and exclusive offers can keep your brand top of mind.

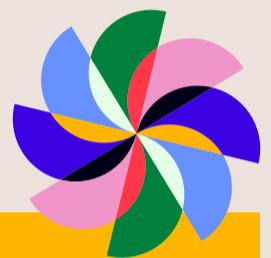
Having a fully integrated content strategy and deciding where to put more resources will take time. Organic traffic and opportunities are often a slower burn than paid traffic initiatives, but don't be discouraged if some of these initiatives fail to pay off immediately. I know these channels are worth investing in and can produce strong results.

Next, let's explore how to build an audience-focused content strategy.





## DEBORAH MECCA



**Deborah Mecca** is a fractional CMO for Shopify apps at **Causeway 305**, a candy store owner at **Love Sweets Candy Shop**, and a speaker on podcasts and webinars. She is well known for leading high-growth strategy within the Shopify app ecosystem and recently opened a candy shop on Shopify to practice social commerce on TikTok Shop.



# CHAPTER 3



## GUIDING AUDIENCE-FOCUSED CONTENT CREATION IN AN EVOLVING DIGITAL ERA

**AS A NEW CMO, YOU'RE EXPECTED TO HAVE  
THE ANSWERS TO MANY QUESTIONS THAT  
EXTEND TO THE PROCESS AND TECHNOLOGY  
DECISIONS IN THE CONTENT MARKETING WORLD.**

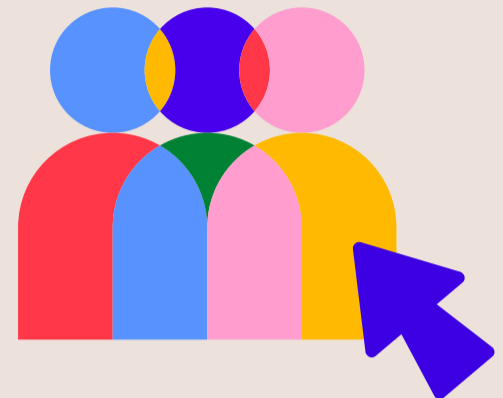
Of course, this can feel overwhelming for a new leader guiding a team through content planning and creation, so in this process guide, you'll find answers for two of the most top-of-mind challenges facing every content creation team in the midst of emerging technology:

1. How does your team continually answer the demanding call of the content machine?
2. How do you create that flow of content in a way that's human-focused, will move the needle for your organization, and doesn't rely on machines to do it all for you?

In this chapter, I'll share four important processes in leading your team to create content that keeps the focus on your audience's goals and needs. These also support a workflow for consistent quality alongside whatever emerging technology is on the table at your organization.

## I. GET TO KNOW YOUR AUDIENCE REALLY WELL

The basic foundation of good content is knowing exactly who it's created for and why they would care to engage with it. In SaaS marketing, your audience members are external to your organization with their external motivations, needs, and desires. The better you understand those, the more your content will connect with them.



- **Go deeper into the dimensions of the buyer journey**

In talking with content marketing teams—led by tenured CMOs and new leadership alike—it usually comes to light that although they consider understanding their audiences paramount to their success, they've never actually spoken to a customer outright.

They've looked at lengthy data reports and put together Ideal Customer Profiles (ICPs), but they've never actually spoken to any one real person who buys their product or service. The gold nuggets lie in this individual interaction, and it can lead to insights that change everything.

Here are five dimensions for getting those kinds of results from your audience planning. Ask these questions to real buyers aloud or, better yet, show them some content and have them walk you through these dimensions and questions together.

- **Doing:** When people are engaging with your content, what are they doing? Consider where they just came from (online or in real life), what actions they take to interact with your content, and what they might do afterward.
- **Thinking:** What thoughts go through their head when encountering your content? Were they already thinking about you and coming directly to your content, or are you new to them?
- **Feeling:** How do they feel in the spaces where they're interacting with your content? Most people operate at a baseline of feeling distracted and mildly frustrated when they're in content-rich spaces, but what feelings might be layered on top of that?

- **Tools and documents:** Your ad or content marketing is just one part of a larger whole. What other tools and/or documents do they have to interact with to do business with your organization? Do they have to access a calendar? A demo inquiry?
- **Other people:** Who else is involved in their decision to do business with you? For many SaaS businesses, assistants often perform the initial research and buying steps for new software partners before their executives get involved.
- **Challenges:** What gets in your customers' way of doing business with you? These could be with your overall digital experience or an external part of the process. Knowing what these are can give you new ideas for content that goes the extra mile.

AUDIENCE GROUP NAME			
Name of content deliverable here			
<b>Doing:</b>	Thing 1	Thing 2	Thing 3
<b>Thinking:</b>	Thing 1	Thing 2	Thing 3
<b>Feeling:</b>	Thing 1	Thing 2	Thing 3
<b>Documents of Tools:</b>	Thing 1	Thing 2	Thing 3
<b>Other People:</b>	Thing 1	Thing 2	Thing 3
<b>Challenges:</b>	Thing 1	Thing 2	Thing 3
<b>Opportunities:</b>	List out opportunities for this content deliverable to support this audience group, based on the findings from audience dimensions.		

Once you've gathered your insights, use a mapping chart like the one above to boil it all down into comments you received most often and/or were most surprising. Combine what you found from your audience conversations with your quantitative data. A more audience-focused picture will emerge about creating content that works for your organization and your customers.

- **Seek real-world feedback about work in-progress**

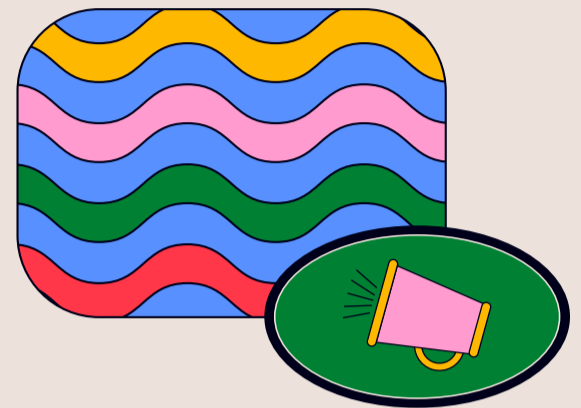
The best way to know if something is working? Show it to the real people for whom you want it to work. You can remove risk and rework a content campaign or project by showing your creative deliverables to customers during the pre-launch stages.

- Show them a content concept your team has created
- Gauge their response to wording or visual assets you're planning to use
- Walk them through your understanding of their buyers' journey
- Watch them engage with your content to see what they do
- Interview them about their preferences, knowledge, and habits

Most marketing content is put together through a lot of guesswork on the part of the marketing team about what audiences do and want. Showing your real audience members work before it ever launches removes that guesswork and practically ensures your content will connect strongly with your audience. All efforts to better understand your audience will set your organization apart and make your content creation far more rewarding.

## 2. CREATE CONTENT DIRECTIVES THAT MEET MULTIPLE NEEDS

The very best content aligns with what the organization and audience want. Put what you know about your organization's vision and goals—along with what you know about your audience's motivations and goals—into clear directives for your content decision-making.



- **Align disparate goals into content directives**

Make a list of content dos and don'ts based on the content goals you wrote. These are directives that guide all decision-making and form the foundation of your content process.

Your team should consider interactions, channels, content formats, media types, word choice, image usage, tone, and any other content elements that make up the customer's experience with your brand.

Use the following framework to write your content directives. This framework will help keep these directives focused yet flexible and allow you to go as granular as you'd like:



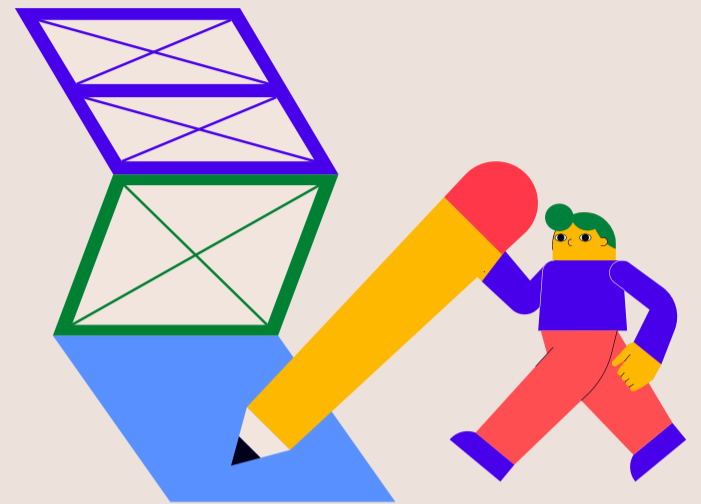
BECAUSE OUR ORGANIZATION WANTS \_\_\_\_\_  
AND OUR AUDIENCE MEMBERS WANT \_\_\_\_\_:  
WE WILL/WILL NOT \_\_\_\_\_."

Every once in a while, what you put in the organization's blank and the audience's blank will be the same thing. Usually, though, they won't be. This process is how your team strikes a strategic balance between your organization's and your audience's goals, even when those goals differ.

If you have more complex audience groups and buying journeys, you may want to create overarching content goals and directives, along with specific goals and directives for each audience, journey stage, and even individual content campaigns.

### 3. SET UP SMOOTH CONTENT WORKFLOWS

Planning for content early and often is the best way to consistently produce valuable content for your audiences while reducing the risk of rework or getting off course for your team and organization. Ensuring you've set up a few key recurring planning practices will help oil the gears of your content machine.



- **Evaluate materials outside of your marketing folders**

At this very moment, your organization is sitting on a wealth of past content, business information, and other messaging materials that can be turned into marketing treasure. Schedule a time once per quarter to mine your organization's files for potential content you already own. Brainstorm with your team how that existing information can strategically add to your ongoing content creation efforts.

Try some less conventional areas and see what you find, such as:

- Customer service call/email logs
- Demo recordings
- Sales conversations
- Past surveys

- **Gather input and information from subject matter experts**

Your internal and external subject matter experts (SMEs) are fountains of company knowledge that could elevate your marketing efforts. These are the people who know your SaaS offering's initiatives, features, and benefits best.

Subject matter experts are often not marketing people. That means their knowledge has to get translated from their brain to your team's brain, then translated again into content that makes sense for your audience members.





Trying to assemble all of that subject matter expertise from one big information dump is an overwhelming task. It can leave team members' brains feeling fried and subject matter experts feeling a bit misunderstood. Instead, set up a regular time for knowledge sharing—say once a quarter or whatever makes sense for the subject matter expert and their expertise area.

I highly recommend that you record these meetings or calls so that new information can be shared more widely across your team. The more creative and strategic minds think about the owned knowledge of your company, the more inspiration and ideas you can encourage. You may even return to a previous recording months later and find a hidden gem.

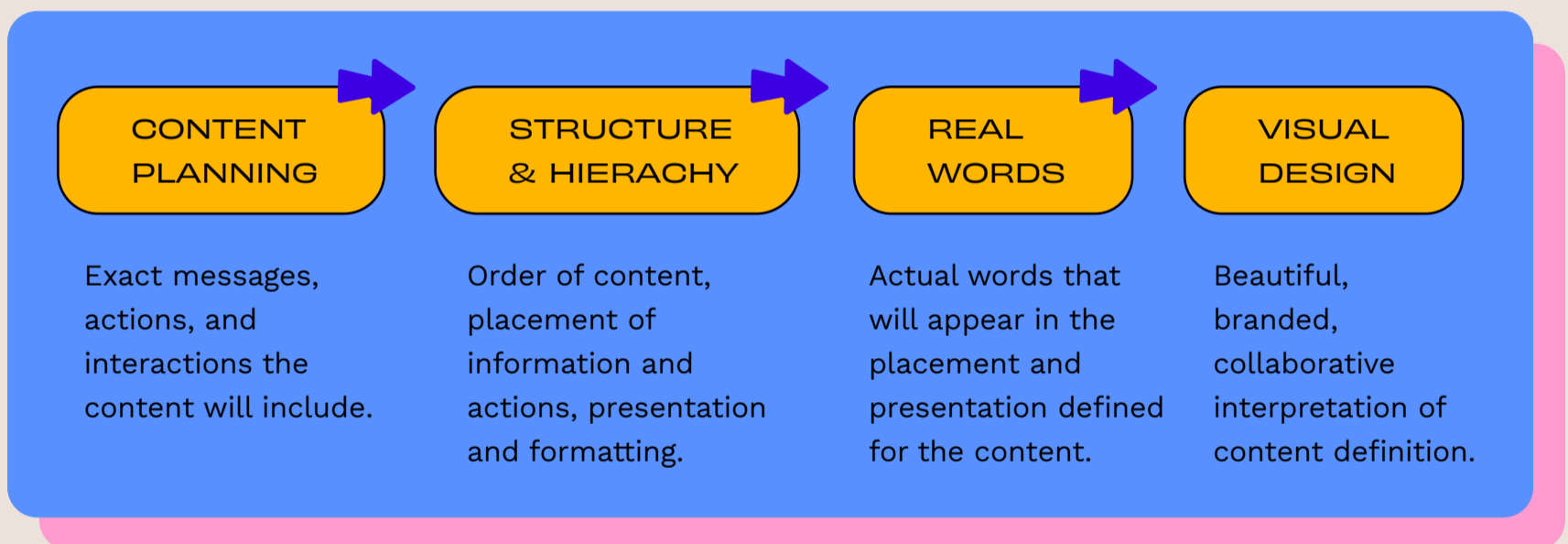
By regularly meeting with subject matter experts, your team has regular and more manageable collaboration time with them to explore new thought avenues and get new inspiration relating to their specific content campaigns.

- **Establish successful content creation workflows**

Most of the world's content is created without much strategy, planning, or purpose behind it—including many of your competitors' content. It shows, too, in engagement, conversions, and audience attitude about the business.

It's important to remember that your audience engages with your content—the words, visuals, and media you use to tell them about your SaaS services. While it can be tempting to get your content out there quickly, your team should have the following planned before it even moves into design:

- What are the exact messages and pieces of information in this content?
- What is the hierarchy of information? What comes first, second, third, and why?
- What is the action you want the customer to take?
- What are the exact words and media you'll use to bring it all together?
- Does this all align with your content directives?



If you skip these pivotal steps, design can only guess at what the content presentation might need to be, leading to rework and frustration for everyone involved—including your customers.

## 4. CONTINUOUS CONTENT CREATION AND DISTRIBUTION

Here's where you bring it all together: your audience understanding, goal alignment, and creation processes merge to establish a fountain of quality content production.



- **Decide where to distribute your content**

The challenge of where and how to distribute your content is as old as content marketing itself, and it truly depends on your ideal audience members' buying behavior.

In that first step of this process guide, where you enter new dimensions of audience understanding, make it your mission to find out where people see or find your content. Some answers, such as trade magazines, Facebook groups, or a screenshot their CEO sent through internal messaging, might surprise you. Others may come from more obvious channels, such as:

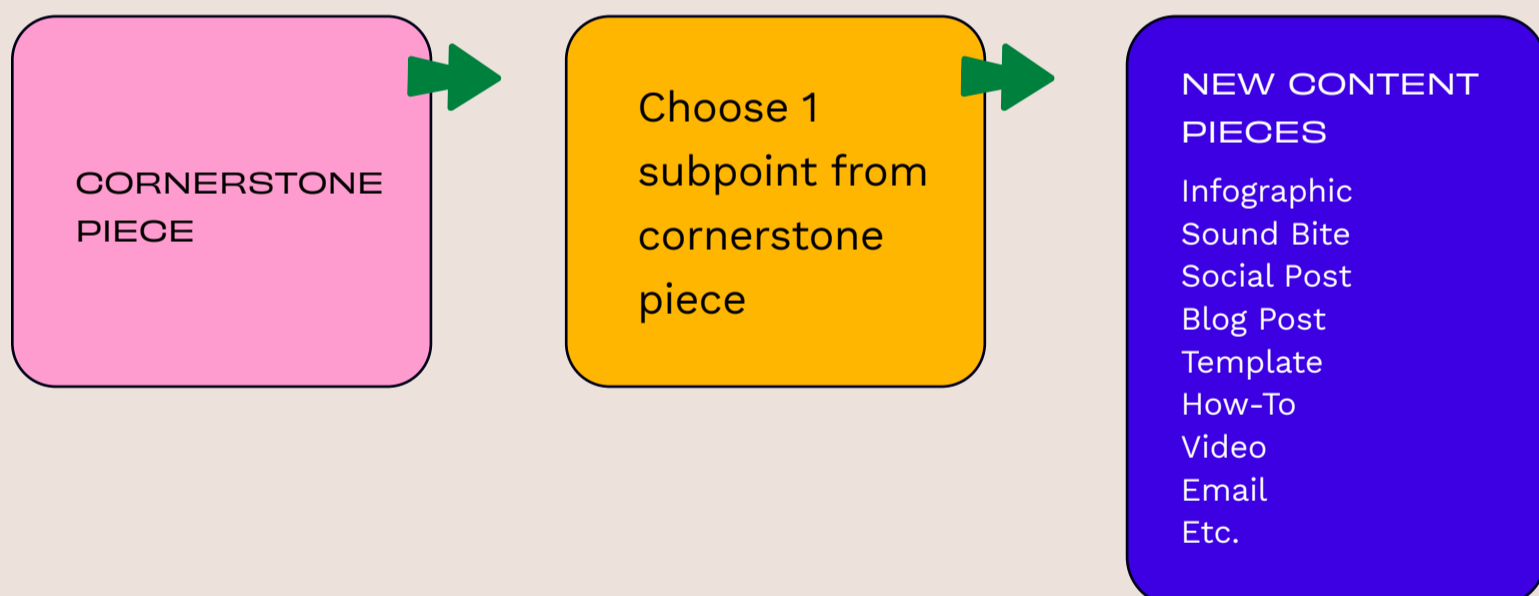
- Email marketing
- TikTok
- Instagram
- LinkedIn leadership posts
- Paid search
- Social ads

You'll need to ask your buyers to get your own 'aha' moments about the best channels for distribution and where customers are learning about solutions like yours. Don't feel that your team needs to distribute on all or even most marketing and advertising channels just because they exist. Choose the spaces where you know the audience members are visiting already.

- **Repurpose more often than you create net-new content**

It typically takes multiple times for audience members to receive a content message before they'll notice it and even more times for them to remember and act on it. Yet most teams never reuse or recycle the big content pieces they create (often called "cornerstone" content). Most teams distribute each post, article, report, webinar, etc, once and then start all over again.

Your team doesn't have to start from scratch on the content creation wheel every time, nor should they. Repurpose your big content pieces into different presentations of the same information and/or smaller chunks of the original whole. This gives your team more consistency in their messaging, more time for their strategic and creative work, and more quality content to distribute at the same time.



- **Optimize the content experience after distribution**

For your audience members, the experience with your SaaS offering and brand doesn't end once they engage with a piece of marketing content or an advertisement. In fact, audience members don't differentiate between your marketing content or ads versus their buying process experience. It's all one experience of your brand to them.

Always test the transition from marketing content that catches your audience members in the wild (articles, posts, emails, trade show booth materials, etc.) to the content that makes up their buying process (website, landing page, demo form, vendor consultation, etc).

Your team should test the flow from marketing to conversion content themselves on multiple devices and from the standpoint of multiple buying situations. Then call back the customers or audience members you spoke with during your research phase, and engage with them to test it some more. This is the moment your audience is finally ready to do business. You do not want to lose them at that late juncture.

## **STAYING INTENTIONAL WITH CONTENT CREATION**

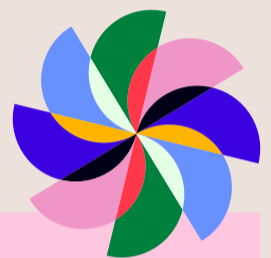
Content planning, creation, and production can feel overwhelming, even to the most content-centric SaaS organizations. Using the strategic, audience-focused processes outlined in this chapter will take unnecessary burden away from you and your team and show your audience members that you care about their journey.

As technology continues to emerge, shift, and impact our marketing efforts, your organization's approach to managing the increasingly complex tech stack will become more and more what sets you apart from the competition.

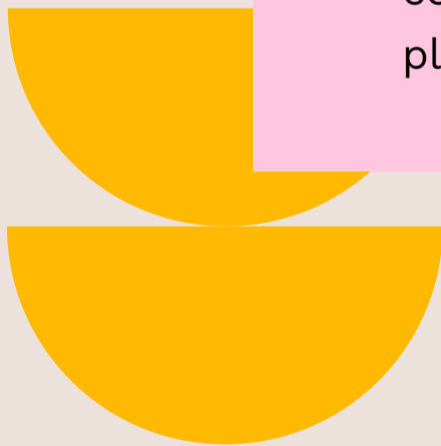
In our final chapter, we'll explore how to make your tech stack a competitive advantage.



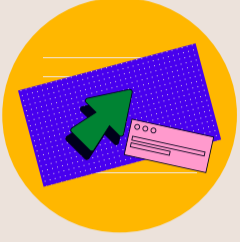
## BAILEY LEWIS



**Bailey Lewis** is an author, speaker, and founder of **Words First Content Strategy**. She is known for her strategic and people-centered approach to content and communications decision-making. Bailey teaches and inspires leaders, teams, and organizations to make their corner of the world a more human, intentional place to do business—on-screen and offline.



# CHAPTER 4



## 5 TIPS FOR MANAGING A COMPLEX MARKETING TECH STACK

As you work your way through this final chapter, let's establish one pivotal fact:

**MANAGING YOUR MARKETING TECH STACK  
ISN'T JUST ANOTHER TASK ON YOUR TO-DO  
LIST—IT'S ARGUABLY THE MOST CRUCIAL TASK  
FOR A MODERN MARKETER.**

Here are four reasons why:

1. Your data is the lifeblood of your marketing strategy
2. Accurate reporting prevents lost ROI on ineffective media strategies
3. Your marketing stack influences onboarding, training, daily ops, and analysis
4. Scaling growth requires strong organization and flexibility

In the forthcoming sections, I'll dive deeper into the nuances of managing a MarTech stack, equipping you with five of the most useful tips I've learned over a decade of growing some of the most dynamic brands in ecommerce.



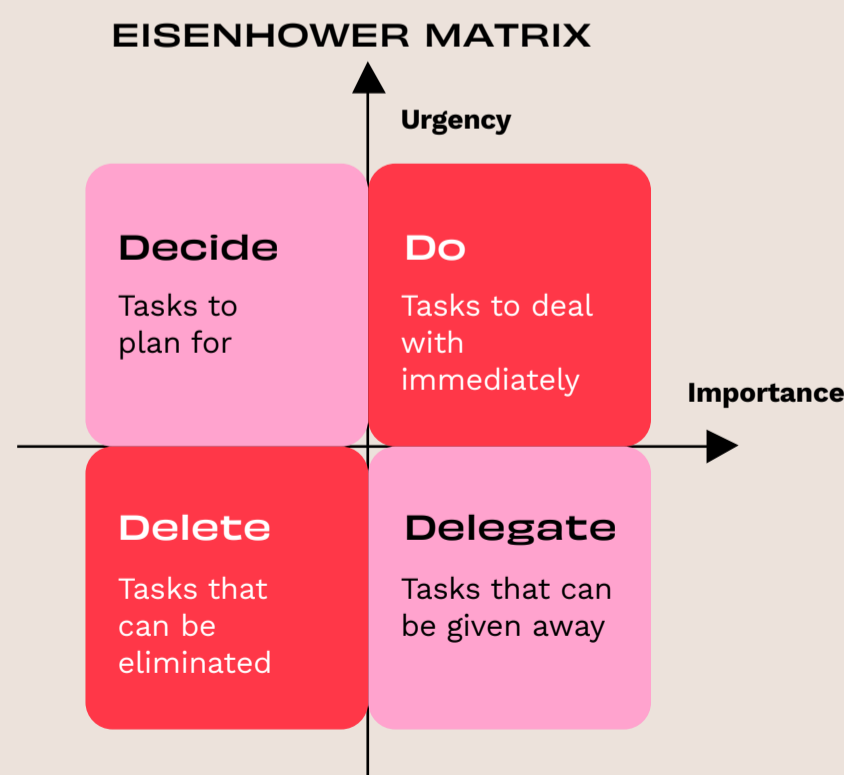
## I. USE BIG ROCK GOALS TO IDENTIFY SOFTWARE NEEDS

This tip may seem self-evident to you but don't skip it. If you've ever been to physical therapy, you know that the easiest exercises to do are also the easiest not to do, and make sure that your team is completely aligned and motivated by a unified set of goals—and that they have the software to help them accomplish said goals—is essential to your sustained success.



In his book *First Things First*, business habits expert and author Stephen Covey laid out a "Big Rock" concept that's become crucial for effective goal management. It involves prioritizing significant tasks (big rocks) over less critical ones (small rocks and gravel) so that you're focusing on the most impactful goals, leading to greater productivity.

In this instance, it's about breaking down lofty, long-term goals into a set of shared short-term objectives—and then identifying which specific tools and software can help you get there.



Use an Eisenhower Matrix to identify your urgent and important goals. These are your big rocks.

Source: [The Process Hacker](#)

Your big rock goals are your top three to five priorities for a quarter. These should be specific, actionable (reasonable), measurable, and time-bound. For example:

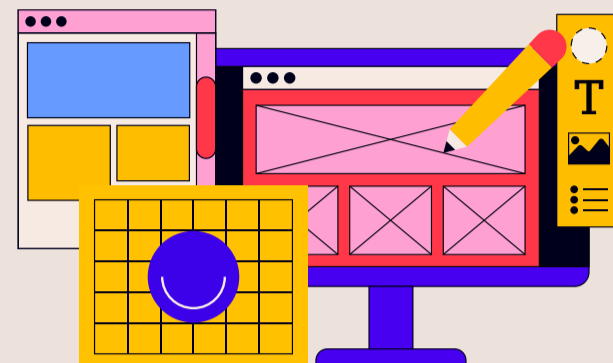
*Increase online store conversion rates from 2.5 percent to 2.8 percent by the end of Q3.*

With this priority, you and your team can focus on tactics and tools that bring the highest-converting visitors to your site: returning customers. Meanwhile, your customer success team may develop a virtual assistant or AI-based tool to answer questions commonly asked in the consideration or conversion phases of the buyer's journey. Your UX team may invest in iterative conversion rate optimization changes to your product detail page and so on.

When you properly centralize your goal setting, each department naturally breaks off a chunk of your big rock goal, improving coordination, accountability, and use of software for success.

## 2. ASSESS FREE TOOLS TO SAVE BUDGET

When most people imagine a marketing tech stack, they think of the costly, powerful platforms they use to mount and measure omnichannel sales campaigns. But many of the most useful business intelligence resources are actually free or come at low cost.



Adding these free options to your MarTech stack will cut down on high-cost alternatives, provide you with valuable intel on your competitor's strategies, and give you actionable insight into the search terms and words driving customers to your brand, product, or website.

In this section, I'll share the free and cost-effective online business intelligence resources I use every day to bring actionable insights to my clients.

- **Creative libraries**

Creative libraries allow you to search and view a compendium of archived and live marketing creatives. Moreover, most of the best creative libraries are free to use and hosted online, making them no-brainer tools to add to your arsenal.

Here are four that my marketing team uses all the time:

- **Meta Ad Library**: A searchable compendium of live and archived ads from across Meta's social platforms, with detailed meta information on how long the ad has been running, what type of ad it is, which platforms it's deployed on, and the advertiser.
- **Google Ad Transparency Center**: Similar to the Meta Ad Library, but for Google Ads. Includes a paid media transparency feature that's particularly useful for evaluating competitors' paid content strategies on YouTube.

- **LinkedIn Ad Library:** Similar to the Meta Ad Library and the Google Ad Transparency Center, but for LinkedIn ads. Provides information on ad targeting as well as geolocated impressions data.
- **Milled.com:** The leading marketing email database. Great for sourcing creative inspiration, mapping your competitors' email cadence, seasonal promotions, loyalty plays, and more.

- **Keyword research tools**

Keyword research tools can be expensive, but they're worth their weight in gold if you're pursuing a long-term SEO strategy, bidding on search ads, or gathering intel on purchase-intent queries to answer with an FAQ or customer service scripts.

- In Q4 2023, **Moz** and **Semrush** are the industry-leading keyword research tools and the most expensive. Each comes with a slew of advanced features for dedicated SEO marketers, and if you're well-budgeted and organizationally committed to SEO, they're the tools you should consider first.
- However, I've derived tremendous value from more lightweight keyword research tools like **Ubersuggest**, **Answerthepublic**, and **Keywords Everywhere**. If you've decided to pay for a tool, here are some key bits of information it should provide you with:

#### KEYWORD RESEARCH

- Search volume over time
- Paid competitiveness
- Organic competitiveness
- Top-ranking keyword content
- Related keywords and terms

#### SEO ANALYSIS

- SEO issues by page
- Backlink tracking
- SEO content suggestions
- Your ranking keywords
- Keyword suggestions
- A composite "SEO score" (to track your progress over time)

#### COMPETITOR TRACKING

- Competitors' ranking keywords
- Competitor traffic volume
- Keyword gaps (words your competition ranks for but that you don't)
- Competitor backlinks

- **Technology tracking tools**

- Want to see which marketing tech your competitors are using online? Technology tracking tools like **BuiltWith** and **WhatRuns** can help with that. Just add the URL of the website you want analyzed, and lift the hood on your competitors' websites for free.

At the paid level, technology trackers can also be used to generate exhaustive lists of companies fitting a specified technology profile or to access macro data about a particular technology's market share among businesses of different sizes.

### 3. KEEP TECH THAT HELPS YOUR TEAM WORK

You've been reading the breathless pronouncements for a few years now: *The five-day workweek is dead. Hybrid work is here to stay.* Chances are your team either doesn't work in a completely synchronous environment anymore or won't in the near future.



At my current company, we've been fully virtual since the pandemic, and I've found that maintaining seamless collaboration and accountability in a remote environment requires intentional de-siloing. Luckily there are two simple, impactful practices you can leverage to improve your teamwork vastly:

1. Communicate via shareable screen recordings as much as possible.
2. Employ a great centralized omnichannel marketing calendar.

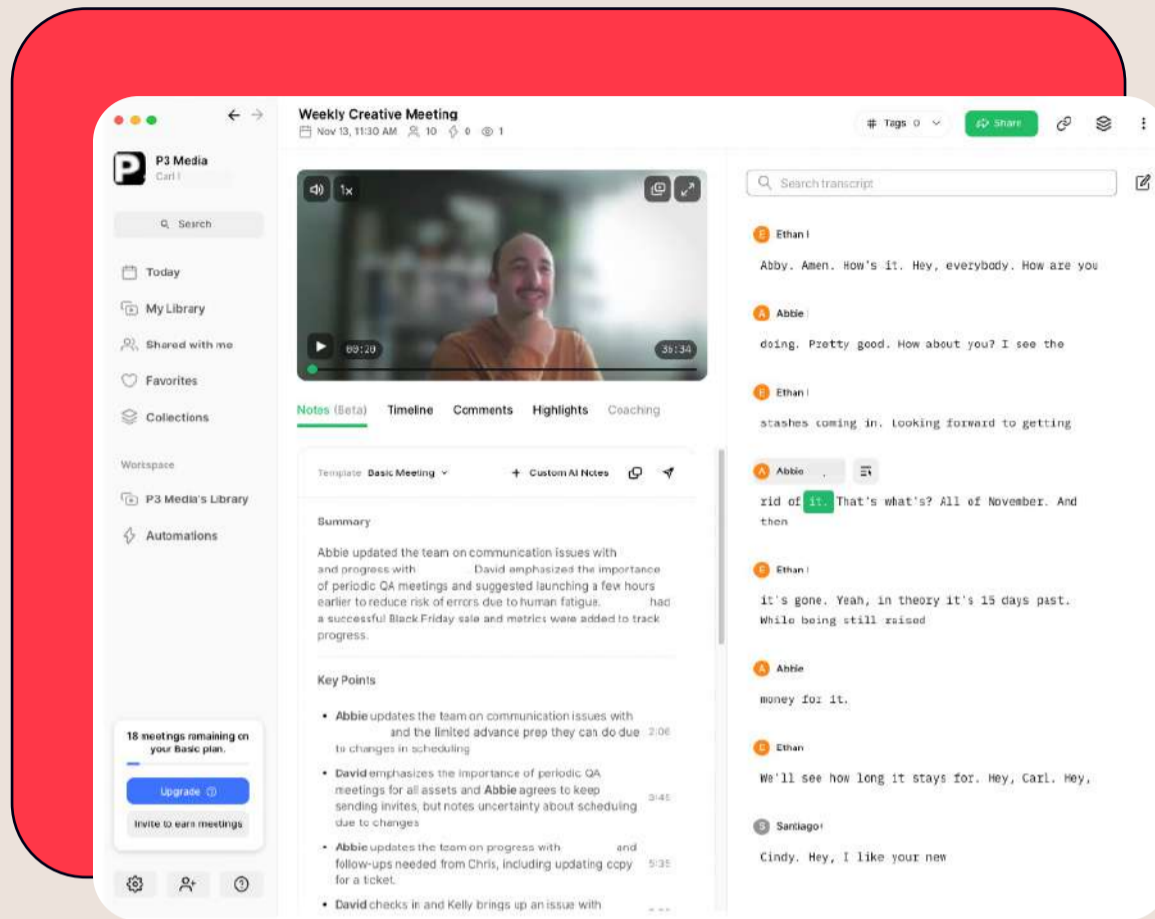
Let's take a look at the tech involved with this.

- **Leverage video for collaboration**

Screen recordings are a labor-saving game-changer for asynchronous collaboration. Compared with providing feedback by text, video offers a more efficient and naturalistic way of sharing information, allowing team members to demonstrate action items they might normally have to explain, and quickly explain items they might normally have to put into writing.

Most video recording services also include automatic transcription and captioning, which makes it simple to turn them into searchable help articles or SEO content.

I currently use **Loom** (shareable screen recordings) and **Grain** (an AI meeting transcriber with video) to communicate about tasks, demonstrate bugs or solutions, document internal processes, and create shared minutes and action items for every single meeting. Collaborating primarily via video allows you to give precise directives while saving a boatload of time and staying organized, especially when projects include multilingual staff or off-shore clients.



AI-generated meeting notes from [Grain](#)

- **Use an omnichannel marketing calendar**

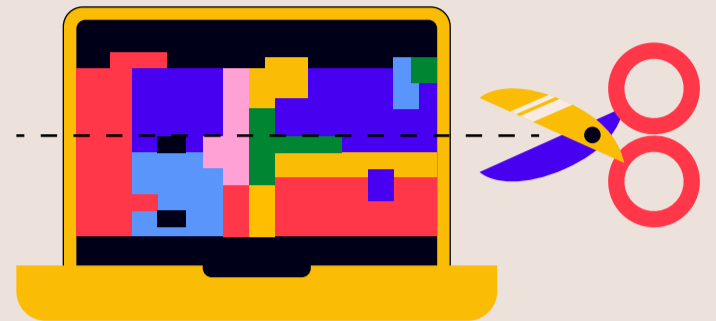
You can download thousands of free marketing calendar templates online, but most are not sophisticated enough to plan segmented campaigns and omnichannel marketing activations or track promotions.

This [calendar template](#), which I've employed for several years, does it all well, can be easily modified according to your needs, and is a proven tool for keeping internal stakeholders aligned across departments. Here are some useful tips for using my marketing calendar:

- Add relevant holidays and important sale days to the editorial/notable days row before building out your comms calendar.
- Build out your segment legend and use it to color-code calendar entries.
  - Name each entry by campaign.
  - Add notes to your entries to indicate caveats, suppressed segments, or additional information.

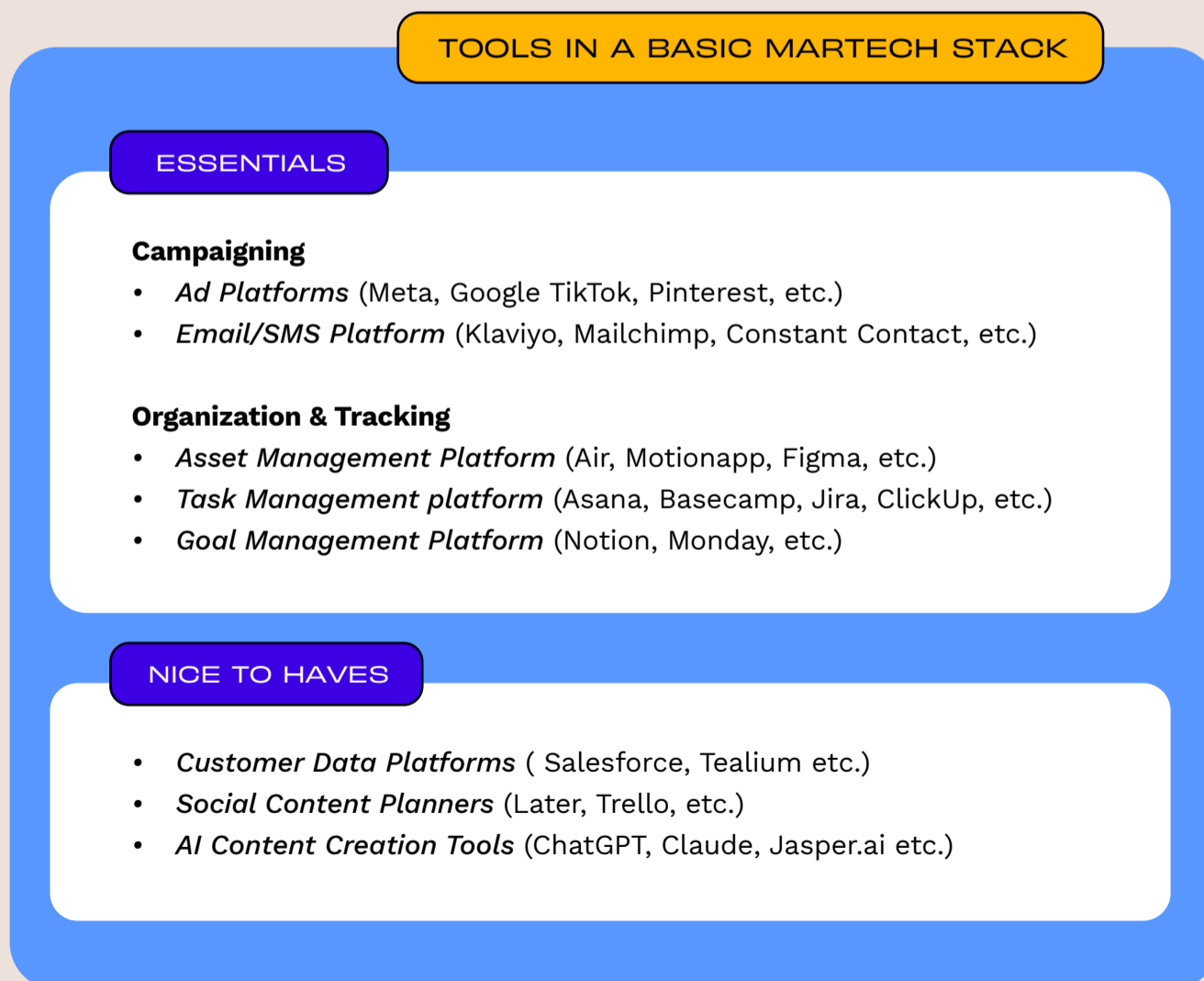
## 4. PRUNE YOUR TECH STACK AS YOU GROW

As you grow, your impulse will be to add more advanced tools to your stack, allowing you to refine your work and convert new audiences. But adding more links to your marketing ops chain means adding more potential points of failure.



Plus, employing more third-party marketing tools will raise your business cost, increase the time you spend managing your technology, and—if you're running an ecommerce website—potentially degrade your website performance.

Just look at all the tools you'll be required to use and manage within a basic marketing stack:





**ONLINE BUSINESS  
INTELLIGENCE RESOURCES**

- *Creative Libraries* (Meta Ad Library, Google Ad Transparency Center, LinkedIn Ad Library, Milled.com)
- *Keyword Research Tools* (Ubersuggest, AnswerThePublic, Moz etc.)
- *Technology Tracking Tools* (BuiltWith, WhatRuns, etc.)

From accessibility, management, performance, and cost standpoints, keeping your technology portfolio as lean as possible is in your best interest.

Luckily, as marketing technology evolves, it's actually consolidating. For example, **Klaviyo** began as an email marketing system for small businesses. Now it's an enterprise level tool that handles SMS and markets itself as a customer data platform (CDP).

And they're not alone. If you use an ecommerce platform like Shopify, you've probably noticed that many of the marketing capabilities that used to require a third-party app or platform are now offered natively, including:

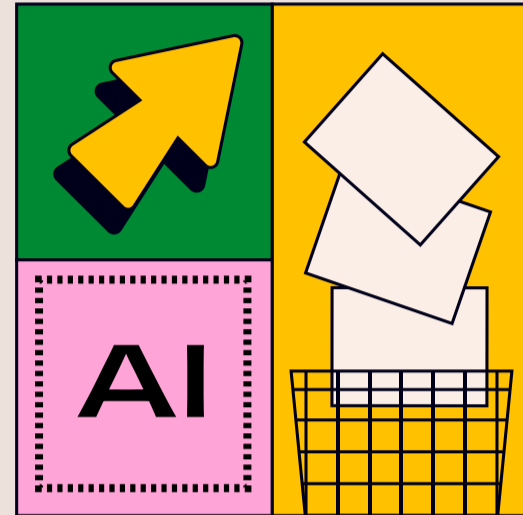
- Email and SMS Marketing
- Customer Relationship Management (CRM) functionality
- Customer Data Platform (CDP) functionality
- Customer Service Chat
- Modals, Pop Ups, and Forms
- Buy now, Pay Later

Make this trend toward consolidation work for you. Whichever tools are in your tech stack now, periodically audit them—whether annually, bi-annually, or quarterly—so you can surface opportunities to eliminate links in your technology chain.

The caveat is that often, when a company with specialized expertise releases a feature outside of that area, it's not as powerful as the dedicated tool you're currently using. At least, not yet.

## 5. MAXIMIZE PRODUCTIVITY BY USING AI THE RIGHT WAY

Despite the hype, AI is still underdeveloped in the area of business solutions and strategy. However research shows that if you use the right tools for the right purpose, AI can actually be a huge time-saver and provide a significant competitive advantage.

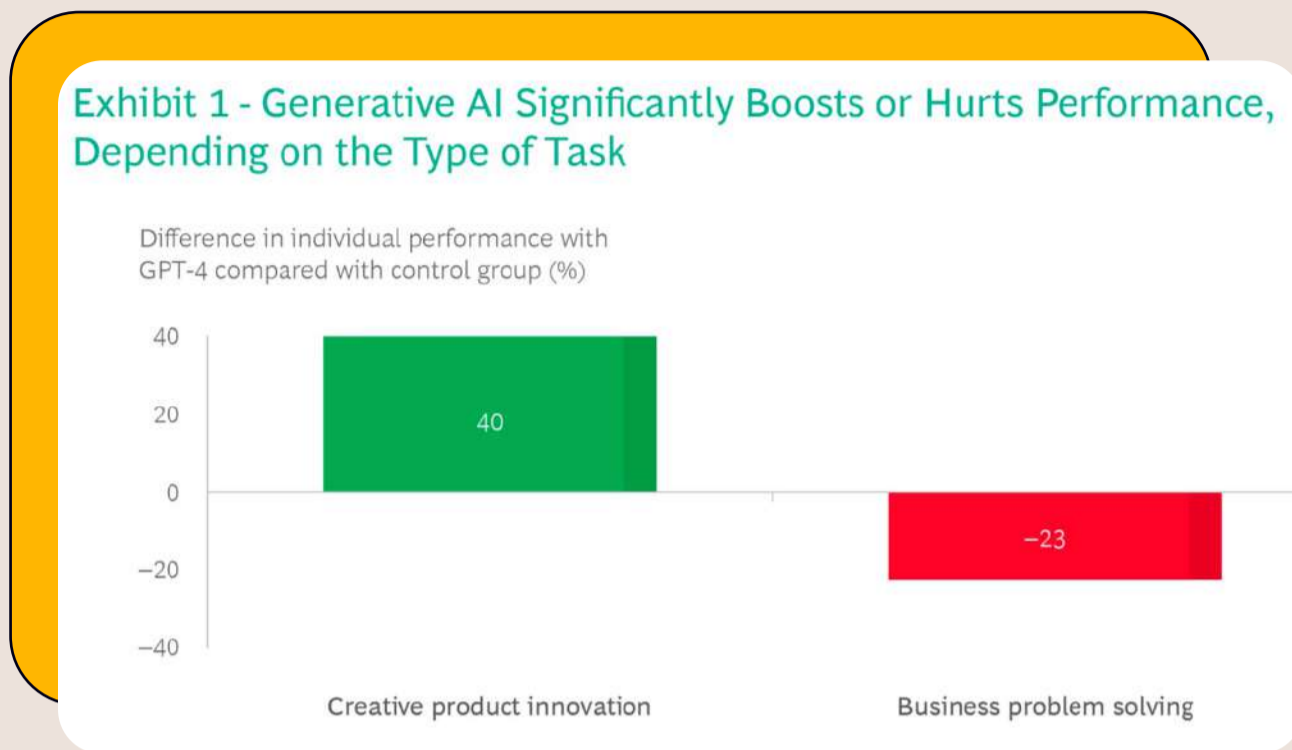


- **Creative innovation over complex problem-solving**

In a breakthrough study, Boston Consulting Group (BCG) partnered with Harvard, MIT, the University of Pennsylvania, and the University of Warwick to test the efficacy of generative AI on workplace productivity across 750 consultants at BCG.

It found that generative AI creates powerful competitive advantages in areas where it has a firm competence (for example, in the field of creative product innovation). In cases where participants used ChatGPT-4 to come up with creative, novel, or useful ideas, they performed about 40 percent higher than those working without the tool.

On the other side, generative AI dramatically reduces performance in areas where the models are currently underdeveloped (like business problem-solving). In cases where participants used ChatGPT-4 to weigh nuanced qualitative and quantitative data to answer a complex question, they performed 23 percent worse than those without generative AI tools.



Results of a human-generative AI collaboration experiment (May-June 2023); Source: **BCG Analysis**

So what does this mean for you? There are staggering performance gains to be made by using GenAI for the right types of tasks.

These tasks should require little to no complex business analysis, be laborious to perform manually and fall within your realm of comprehension so that you can audit your results manually. The most consistent marketing application I have found for GenAI is the rapid generation of SEO topics and content. Below, I'll share how I've done this.

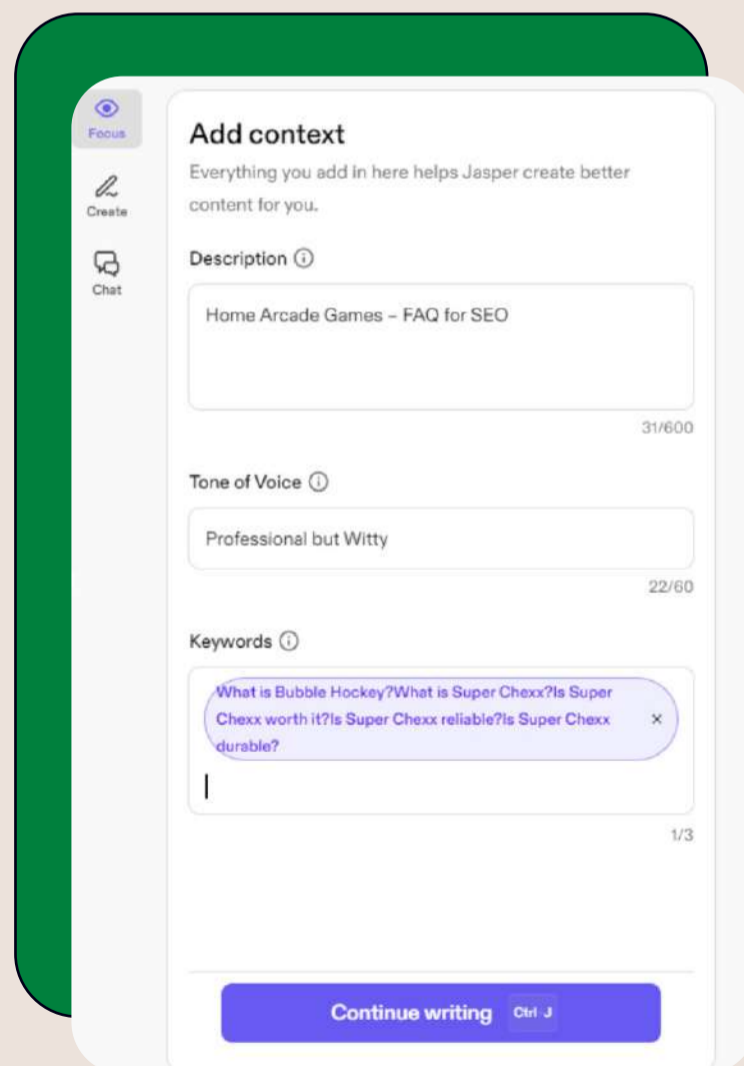
- **Using generative AI effectively**

If you're interested in using GenAI for SEO and content, there are two crucial things you need to know before you start:

1. First, understand that most new GenAI “technologies” are really just static UI wrappers disguising the big general models like Open AI's **ChatGPT** and Meta's **Llama 2**—fancy bodywork around the same two or three engines.

This isn't always a bad thing. In fact, wrapped AI is useful for creating highly specific SEO content because it provides a templated, paint-by-numbers approach to prompt engineering that can further speed up the process of working with a model like ChatGPT. The trade-off to this approach is that you're paying a premium to limit how you interact with a foundational AI.

A good example of this trade-off in action is **Jasper**. Jasper leads you through the content creation process by asking for a series of inputs like topic, keywords, and voice. It then turns your basic inputs into a complex prompt that feeds to a large AI model and returns your content. Jasper can produce passable SEO articles faster and with less sweat equity than I've achieved using the foundational models, but I have yet to get it to produce a piece of content that doesn't require manual editing.



Creating an FAQ with assistance from Jasper.ai

2. That leads me to the second point you need to understand: At this point, AI cannot be trusted to produce accurate, engaging content without human oversight. And if you use a wrapped AI like Jasper, you'll likely find yourself doing more editing than you will when using the foundational models directly.

When you use a foundational AI, engineering effective prompts takes more effort up front, but you'll be able to produce more refined results in the long run. Plus, as the AI model improves over time, so will your content.

That's why generally speaking, I recommend that you leverage foundational AI models directly, such as Open AI's **ChatGPT**, Meta's **Llama**, Google **Bard**, and Anthropic's **Claude**. When you use these models, there are no limitations to your interaction patterns, and you won't pay extra money to cap the quality of your results.

## **BECOMING A COMPETENT, CONFIDENT CMO**

Everything I've shared in this chapter highlights the most important things I've learned about managing a complex marketing tech stack over my decade of daily practice. Follow the practical tips above—and in the previous chapters by my co-authors—and you'll find yourself marching toward a set of well-defined goals at the head of a motivated team, with the support of key stakeholders and a lean tech stack built to elevate your day-to-day ops.



## DAVID WAGONER



**David Wagoner** is a serial entrepreneur with a diverse background in technology, marketing and creative. He is the Co-Founder and CMO of P3 Media, an award-winning digital agency that accelerates growth for high-volume businesses and Fortune 500s. Prior to building P3 Media, David founded and operated venture-backed technology companies in the Fintech and Ad Tech space. He contributes perspectives to Entrepreneur, Forbes, Authority Magazine, and more.





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