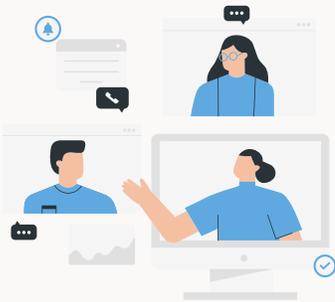


# How to Run a Marketing Strategy Meeting

*Tips to make the most out of your time with multiple stakeholders.*



Running a Marketing Strategy Meeting is difficult enough - with so many people to include and multiple different departments with valuable information to invite, it takes some planning and coordination. With multiple different THINGS that need to happen, it can be a challenge! How can you get the information you need? How can you ensure everyone stays on track? How do you decide what are actionable to-do's after the dust has settled?

## **USE THIS GUIDE TO HELP YOU:**

- Invite the right people.
- Let your team know how to prepare beforehand so your maximize your time together.
- Have a clear agenda that guides the discussion while getting the right information.
- Get the right information without going too far off track (and some ways to get the team on track)!
- Decide what you need to do after the meeting is over and assign who needs to do it.
- Understand the components that need to go into the document to ensure it's usable.



## Who to invite:

- ✓ Entire Marketing Team, especially if you have roles like social media, a website designer, brand managers, etc.
- ✓ Sales Team Director/Manager.
- ✓ 1-3 members of the C-Suite.
- ✓ Customer Service Director/Manager.
- ✓ Product Managers.
- ✓ Project Managers.
- ✓ Subject Matter Experts in your organization.



Don't forget - the more people in the meeting, the harder it will be to not only hear ideas but to keep everyone on task. Keep the meeting to a maximum of 14 people. If you need more people, consider a few different meetings.

## Example Email Invitation:

Hi [attendees],

I am inviting you to a Marketing Strategy Meeting for our [company/brand/etc]. The goal of this meeting is to come up with a marketing roadmap and strategy so we can connect with our audience in an authentic way on our site, in our blog, and in on our social channels to drive more interaction with our [company/brand/etc]. Prior to this meeting, please make sure that you review any of our current marketing channels and be prepared to bring ideas about:

- What we do well, overall and in our current messaging, marketing, and content initiatives.
- What our competition is doing better regarding messaging, marketing, content and connecting to customers.
- Thoughts on who we sell our products too, and how we sell to them.
- What are some pain points you think our customers have, and how do we solve them?
- What questions you often answer for customers.
- What you wish our customers knew more about.
- Sales, inside sales, project managers: What tools/items could make your jobs easier?

Can't wait to hear your thoughts and ideas!

[Signature]

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# Sample Agenda:

- Introduction and Ice Breaker
- Meeting Objectives/Goals
- Discovery Questions
  - Current Situation - business and marketing.
  - Where do we want to go?
  - Competitive Atmosphere.
  - Discuss current marketing mix and channels.
- How are we different?
  - Who do we sell to? What are our main customer profiles, and how do we continue to speak to them in our marketing channels?
  - What marketing channels are we on that we should stay on, and where are we that maybe we don't need to be?
  - What makes our business different than the competition?
  - What are we doing that works?
  - What are we doing that doesn't?
- Roundtable/Open: recent customer success stories; recent negative feedback.
  - What are pain points?
  - How do we as a business solve them?
- Roundtable/Open Discussion:
  - What is going on in the industry now?
  - Where do we see the industry going in the next 1, 3 years?
- Wrap up.

**Feel free to add in more in-depth questions depending on your industry and market, but keep the agenda shorter so you can inspire people to spend more time in an open discussion.**

**This can uncover topics and content ideas in a very organic way!**



## Do's

- ✓ Take a leader role and guide the meeting to go in the direction you need.
- ✓ Designate roles within the marketing team - facilitator, note taker, time keeper, etc. This way information doesn't get lost and the marketing team can listen with a "marketing" ear.
- ✓ Write down your deliverable marketing suggestions all in one place. What we mean is - there will be a lot of ideas flowing of marketing needs to help support sales and the organization, so while it's not important to focus on the deliverables during this meeting, having a list to review after will save you time in the future.
- ✓ Ask more questions, especially around customer success and customer concerns,, to uncover hidden pain points and marketing messages.
- ✓ Ask people to freely give their ideas, and ask the team to allow that to happen without judgment - no question or suggestion is too far-fetched!
- ✓ Use re-direction to get people back on track:
  - Try things like:
    - Tell me more about.....
    - [Name], you mentioned....
    - Let's circle back to [the topic]...
    - Let me see if I have this right....

## Dont's

- ✗ Don't start the meeting without a plan!
- ✗ Don't forget to encourage sharing and open communication.
- ✗ Don't forget to assign roles so nothing gets missed or forgotten.
- ✗ Don't forget to send out the email invite with homework so your team can come as prepared as possible.
- ✗ Don't forget to debrief after the meeting - within 48 hours so ideas are fresh.

# What is IN a Marketing Strategy Document?

- Introduction which includes a high-level outline of marketing strategy and goals.
- Audience Analysis
- Marketing Goals and Objectives
- Positioning/Messaging
- Competitor Analysis/Research
- Communication Plan
- Content Pillars/Topics
- Technology Plan
- Metrics/Benchmarks
- Key Stakeholders
- Assignments and Due Dates
- Gantt Chart (if applicable and desired)

**You could have other areas in your marketing plan too, but this is a good outline to get you started!**



# What to do after the meeting is done:



De-brief within 48 hours so ideas are really fresh.



Review the notes, discussions, and any important topics/ideas that came from the meeting.

Put marketing initiatives in to three buckets:



- Short-term, achievable marketing initiatives.
- Marketing initiatives that are easier, but require another person(s) in your organization to help produce.
- Longer-term, wish list initiatives that needs planning and muscle to produce.



Build your Marketing Strategy document!



Delegate all short term marketing initiatives, including due dates.



Create your Marketing Strategy Document so all team members can use and reference immediately and in the future.



Get the team excited about taking marketing to the next level!

