FUTURE PLANNING

PREPARE: Look at your data and make sure that it is tracked, maintained, and mapped accurately, preserving the chain of custody. By aligning definitions, adding timestamps, and identifying missing data, you will improve data quality and enable effective planning and reporting.

PLAN: Move away from manual and spreadsheet planning. Use a system that shows all your marketing plans, execution, and tracks progress in one place. Create in real-time and collaborate with team members. A calendar-based interface is a great place to start.

PREDICT: Leverage custom modeling to compare historical performance to expected conversion rates. Layer in velocity, not just how long it takes to deliver programs, but for programs to travel throughout your funnel. Observe your expected acquisition performance for opportunities or gaps that require new planning.

MONITOR: Get a real-time campaign performance monitoring tool. An ever-present, always-on, dashboard and alerts that enable marketers to pivot on a daily timeframe. Underperformance of campaigns are the number one cause of shortfalls and desperate attempts to find a Bluebord. Often, teams measure performance on a monthly or quarterly basis and it is already too late.

IMPROVE: Review your campaigns and find ways to close gaps based on historical metrics and ROI. Make data-driven decisions to optimize campaigns, maximize budget allocation, and achieve desired results. You can proactively pivot to ensure future campaigns are producing the desired outcomes.

INVEST: Gain a comprehensive view of marketing investments and understand which channels and campaigns deliver the best ROI. Know when marketing efforts reach pipeline and allocate budgets to match marketing goals. Set objectives, track progress, and make modifications to maximize results. Flexible campaign attribution logic allows for pinpointing the best-performing channels, optimizing performance, and making data-driven decisions.

IN-QUARTER IMPACT

☐ Create a campaign scorecard of the best performing content per channel. This list should include the following metrics: Velocity, Conversion Rate, and ROI. Sort the list based on Velocity and compare to available budget.

☐ If your campaign velocity is greater than the time left in quarter, pull a report of previously captured leads that are moving quickly through the funnel and prioritize working closely with your sales team to target them. Add personas to those accounts and start new campaigns to enhance internal awareness of your brand.

☐ Review your stuck leads and opportunities which sit too long at the same stage. Any prospect above the median age should be retargeted with a new segmented campaign.

☐ Place emphasis on promoting products with shorter sales cycles, trials, or freemiums. They may engage with the lower-level product and buy more anyhow. For direct-to-consumer sales, offer coupons on saved or abandoned cart items.

☐ Pull a report of leads that were recycled to nurture over the past three months and start a new call-down campaign.

☐ Launch a self-hosted webinar, offer a raffle giveaway, and invite all current prospects.

☐ Revisit deals that were pushed to the following quarter by the sales team.

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