

How to Use Marketing Rocks

If you're running on [EOS® \(Entrepreneurial Operating System\)](#) you know how to use [Rocks](#) for your Quarterly meetings. We're big fans of EOS® and are frequently asked for ideas on what marketing Rocks would look like.

Below are some marketing Rock ideas for your company. Ready for you to copy, paste, and adjust as needed.

We've organized these Rocks by [Leadership](#), [Management](#), and [Execution](#) functions. Be sure to check back as we're adding more all the time!

We hope this saves you time and keeps you focused on your marketing foundations.

Note: In addition to the S.M.A.R.T. method of developing Rocks, we've ensured all of your Rocks tie back to your Vision. If you're unsure what your Vision is, look at your VTO (Vision/Traction Organizer) and read through our [approach to marketing](#) that positions your Vision at the core of everything you do.

Marketing Leadership Rocks

Rock: Craft your Vision statement

This is not a fluffy statement that sounds fancy but means nothing. Your vision statement guides absolutely all marketing decisions (and beyond).

Your vision is where you want the company to be in 5, 10, 20 years. What does it look like? Who are you serving? What do you offer?

A solid vision statement is:

- **Measurable:** How would we know if progress is being made?
- **Attainable:** Must be able to take it seriously.
- **Inspiring:** Must engage people emotionally.
- **Cultural:** Must fit with the organization's unique style.
- **Single-Minded:** Must be focused.
- **Vivid:** Must be clear and easily understood.

Trust us when we say that this is the single most important marketing tool you have and the hardest to develop.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Craft your vision statement

V – Vision: This Rock is to create your vision statement. All other Rocks will tie back to this statement.

S – Specific: Craft your vision statement. One simple sentence in as few words as possible.

M – Measurable: The statement needs to exist and be communicated to the company. The measurable here is that it exists.

A – Attainable: Your leadership teams need to understand the importance of a vision statement and how it's used. This is only attainable if your leadership team is ready to choose a path forward and go all-in.

R – Realistic: The vision statement is difficult to do on your own. Consider bringing in an outside consultant to help guide the exercise (ask us, Foundations First Marketing about our Vision workshop).

T – Timely: Give yourself the full 90 days to draft, test, and finalize your statement. It is essential that everyone buys in.

Rock: Decide on your marketing KPIs/Build your marketing Score Card

Marketing KPIs should:

- **Be simple:** You should be able to see the number alone and immediately understand what it means.
- **Be high level:** Keep your core metrics and granular tracking within the marketing team. Keep leadership focused on the outcomes, not the outputs. Things like organic traffic or social media engagement rarely belong in your KPIs.
- **Measure progress towards your vision:** KPIs are how you track your progress to your vision. If you don't have a clear vision, go back, and do that Rock first.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Decide on your marketing KPIs/Build your marketing Score Card

V – Vision: Choosing your KPIs or Score Card metrics are critical as they should track progress towards your vision. If the KPI doesn't directly impact your progress, then it's probably not worthy of being a KPI.

S – Specific: What are the 1-3 marketing metrics your CEO can look at to know your marketing is on track?

M – Measurable: Make sure you choose metrics you can measure and don't require any context to understand their relevance (i.e., number of new customers).

A – Attainable: Defining your marketing KPIs is only attainable if leadership can keep it high level and not request granular data points such as organic website traffic.

R – Realistic: Make sure you can accurately measure the KPI. If you can't define and measure how many leads you get, for example, then don't include it as a KPI until you can accurately report on it.

T – Timely: Define your KPIs and make sure you can easily update them on a regular basis. 90 days should be enough to define your KPIs, get buy-in from leadership, and set up tracking (automated if possible).

Rock: Define core marketing metrics

We're not talking about KPIs here. We're talking about creating core metrics so you can be more efficient in what is reported and measured and tracked within marketing. Avoid wasting time measuring and reporting on too many unnecessary marketing metrics.

For this Rock, take the time to be strategic about what you spend time measuring and analyzing as a marketing team. Of course, you'll have some micro-measurements, but when you are in meetings and making decisions, what core metrics does your marketing team look at? Are the numbers providing enough information to make *strategic* decisions?

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Define core marketing metrics

V – Vision: Look at your vision statement and your KPIs. Your core metrics should impact your KPIs which impact progress to your vision.

S – Specific: Choose your top 3-5 core metrics to report on regularly within the marketing team.

M – Measurable: Core metrics, by definition, are measurable already. Figure out HOW you're going to get the measurement and how often it will be updated.

A – Attainable: Defining your core metrics only works if your entire team (and possibly some leadership) agree on what's important. Without consensus you'll quickly go from 3 metrics to 15+. This is data bloat. You don't want that, or you'll spend all of your time *reporting* instead of *executing*.

R – Realistic: Start with data you can already track. If you can't, for example, track your leads through to conversion then add that to your wish list.

T – Timely: Getting a group of people on the same page is harder than you might think. Make sure the key stakeholders are available this quarter and have the mental bandwidth to understand and agree on your core metrics.

Rock: Build your marketing budget

Do you know how much you need to spend on marketing software subscriptions or when your big renewal expenses are going to hit?

Does leadership have to approve every credit card purchase, holding up productivity?

Can you calculate your total ROI from marketing efforts?

For this Rock, we're talking beyond having your chart of accounts set up in QuickBooks. We're talking about forecasting your marketing spend for the next year.

We see a lot of *money* wasted on unnecessary subscriptions and *time* wasted on staff waiting for multiple approvals for a \$20 credit card purchase.

A budget keeps marketing efforts transparent and keeps the team accountable and empowered to make quick decisions.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Build your marketing budget

V – Vision: How does your budget impact how fast you can reach your vision? Tying your budget to your vision progress keeps it realistic.

S – Specific: Agree on the scope for your marketing budget. How detailed does it need to be? We always recommend starting with larger account categories.

M – Measurable: When complete, you should see exactly how much you have spent year-to-date on all marketing activities compared to what you had budgeted.

A – Attainable: Before choosing this Rock, make sure you have access to your chart of accounts via your finance office or bookkeeping software.

R – Realistic: Start simple by including all expenses from the past 12 months. Don't try to get too sophisticated in your forecasting. Capture what you have spent in the past and make sure it's as inclusive as

possible including items such as your website hosting and consider including salaries from staff and contractors.

T – Timely: This Rock may take the full 90 days as it involves multiple departments.

Marketing Management Rocks

Rock: Create staff & vendor onboarding process

Onboarding new staff or vendors provides an opportunity to set clear expectations from the start. This Rock ensures everyone understands how you do things, what's important, what the non-negotiables are, what quality looks like, etc.

If you onboard right, it will save you a lot of headache re-training staff and vendors down the line.

Consider using this Rock multiple times to improve your process.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Create staff & vendor onboarding process

V – Vision: Staff and vendor alignment towards your vision can speed up or slow down your progress. Getting everyone on the same page, especially new staff and vendors, keeps everyone moving towards the same vision.

S – Specific: Define the scope of what to include as part of onboarding. Do you include company values, the handbook, and a welcome lunch? Be sure to include your product descriptions, target markets, brand guidelines, and your marketing strategy summary.

M – Measurable: For this Rock, your measurable may just be that the process and assets are templated, scheduled, and ready to roll out for the next hire. 100% of all new hires should go through this process.

A – Attainable: Start simple if needed and include things like the handbook, company values, and maybe a welcome gift. You can build out more touchpoints later.

R – Realistic: If you start simple this is realistic. If you don't have an employee handbook, then for this first go-around your onboarding Rock may only include your handbook since that requires HR and likely legal to review.

T – Timely: Define how long the onboarding process lasts. Do you include 3-, 6-, and 12-month check-ins?

Rock: Prioritize your target markets

Target markets work best if they are clear and prioritized. During the day-to-day grind of marketing operations it's often difficult to prioritize efforts. If there is a clear target market hierarchy then content, events, and ads for the primary target market will take priority.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Prioritize your target markets

V – Vision: Think about the Pareto principle (80% of consequences comes from 20% of causes). Likely 80% of your revenue comes from your top target market. Maximizing your growth in one main area can get you to your vision more efficiently.

S – Specific: List out your target markets and put them in priority order.

M – Measurable: Decide what percentage of your marketing should be allocated to each target market. For example, 60% of your efforts could be for your primary target market, 30% for your second, etc.

A – Attainable: This is attainable if you already have your target markets well defined.

R – Realistic: If you have strong opinions at your company about the target market priority then this will be a challenge. It's realistic but may take several discussions to come to a consensus. Note that you should not have an even priority split. There is always a hierarchy.

T – Timely: As you build your priority list, look at how you have spent your marketing time and money over the past year. Is it geared towards one market more than others? Think about how long it will take you to adjust your efforts to the new prioritization.

Rock: Competitor analysis process

Competitors change. They launch new messaging, adjust their ad strategy, and build new products.

Documenting a process to analyze the competitive landscape will keep you tuned in to the marketplace before you get left behind.

This Rock is to build your process to run a regular competitor analysis.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Competitor analysis process

V – Vision: Think about your vision statement. In that future version of your company, what is the competitive landscape like? Having a process to track this landscape is critical to intentionally positioning yourself within it.

S – Specific: Decide what to look for and how often to review it. We recommend a review at least every six months of your top competitors and look at changes to product lines, pricing, messaging, and promotional activities.

M – Measurable: Track changes over time especially in terms of pricing, product offerings, and ad spend. If a competitor has tripled their ad spend, it's worth a discussion.

A – Attainable: Make sure your team has the time and know-how to gather the information and interpret it so you know what actions need to be taken, if any. This information could alter your marketing plan.

R – Realistic: Keep your comparisons realistic. Don't expect to get data points that only a competitor employee would know. Focus on publicly available information and keep it to the basics.

T – Timely: Think about how often it's worth running an analysis. Does your industry change a lot? Then you might need to run your comparison quarterly.

Rock: Create SLA for sales & marketing alignment

Marketing should support sales. But this can only happen if there are clear communication expectations between the two department leaders.

Is the sales team getting junk leads and not telling marketing? Guess what? They are going to continue to get junk leads. If sales want better leads, then marketing needs to know what a better lead looks like.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Create SLA (Service Level Agreement) for sales & marketing alignment

V – Vision: Simply, sales and marketing working together is going to get you to your vision a lot faster than if they are working in different directions or against each other.

S – Specific: Define what needs to be included in the SLA. Keep it to the most critical topics. Include metrics for each department as well as anecdotal feedback from customers. Sales is a treasure trove of information on customers that will be helpful for marketing to use in their tactics and messaging.

M – Measurable: With increased communication, lead quality should improve resulting in better conversion rates from lead to quote or lead to close.

A – Attainable: Education may be needed for both marketing and sales in terms of what each department does, how they operate, what their systems are like etc. Education is necessary to dispel any assumptions about the other department that derail communications and create resentment.

R – Realistic: An SLA is relatively easy to create, but the adoption and ongoing use of it takes management oversight. This is attainable if there is a commitment from both department leaders.

T – Timely: Think about how often the teams should meet or communicate and how. Do your teams prefer in-person/virtual weekly or bi-weekly meetings? Can you set up your CRM to track the some of the metrics and communication needed?

Rock: Create product descriptions

You may not think something as “soft” as product descriptions require a Rock, but they are critical to all marketing and sales efforts and largely never developed properly.

When we are talking about product descriptions, we’re referring to what it is (product category), who uses it (target market), what problem it solves, how much it costs, and the value proposition (the core of your marketing messaging).

These descriptions are used everywhere--in data sheets, pitch decks, web copy, ad campaigns, emails, etc. These descriptions keep messaging consistent and speed up marketing production times.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Create product descriptions

V – Vision: A confused mind never buys. If you are talking about your product differently from marketing to sales and through delivery and support, it’s going to slow your growth towards your vision. Clear product descriptions ensure all departments are talking about the products in the same way.

S – Specific: Outline what needs to be included in each product description. Keep it simple and useful. Don’t make it so robust that it will just get ignored. Brevity and clarity are key.

M – Measurable: You should see decreased production time whether it's a blog post, web page, or data sheet since the messaging is already done by product. While difficult to measure, you should feel the difference.

A – Attainable: It may be a challenge the first time you draft descriptions. They require marketing, sales, and product departments to all agree since everyone will be working from the same descriptions.

R – Realistic: Start simple and you should be able to get these done!

T – Timely: Refer to your new descriptions for all marketing materials and review them as a team to make sure they are updated every 6-12 months.

Rock: Create strategic partner nurture process

Strategic partners are incredibly valuable. They provide qualified leads with shorter sales cycles because the lead came from a trusted partner.

However valuable, we too often see a lack of process around the partner relationships. If the primary contact leaves, you start all over.

For this Rock, you'll build out touchpoints to nurture the relationship beyond the primary contact. This keeps the relationship strong and keeps you top of mind.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Create strategic partner nurture process

V – Vision: As you review your strategic partners, decide which ones align with your vision and which ones aren't quite a fit anymore. As you move towards your vision are you going to need new strategic partners?

S – Specific: Define the scope of your process. Will it include in-person meetings and touchpoints? Is it all digital? Will you include mailers? What about event invitations or holiday cards? There are a lot of ways to build in natural relationship touchpoints.

M – Measurable: Track your touchpoints to make sure they are implemented. Any project management tool will be able to help you manage these relationships. You can also track if your referral numbers increase as well as total revenue from referral partners.

A – Attainable: This is ideal if you have a project management tool or CRM that will allow you to add task reminders easily for each referral partner to ensure the touchpoints are executed. You can start simple with a spreadsheet or calendar if necessary.

R – Realistic: Keep your process simple at first and focus on setting up your systems to stay on top of the relationships.

T – Timely: You can start implementing your new process immediately. Be sure to add the process steps to new strategic partners too!

Rock: Create brand cheat sheet and teach staff how to use it

Your brand messaging, tone, values, colors, logo usage, fonts, etc. are not helpful if they only exist on a remote hard drive that no one has easy access to.

That's where your brand cheat sheet comes in. This is a simple one-page document that gives everyone the basics to keep all assets on message and looking consistent.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Create brand cheat sheet and teach staff how to use it

V – Vision: Your brand should be crystal clear for everyone. There should be no ambiguity. The look, feel, and tone of your brand needs to be consistent and aligned with the vision for your company. “Dress for the job you want” is applicable here.

S – Specific: Decide what to include in your brand cheat sheet. At a minimum it should include your logo, colors, fonts, overall brand messaging like your value proposition, and your short company description. This can also be called a “brand canvas” if you're looking for ideas on what to include.

M – Measurable: While difficult to measure in numbers, when you do your annual brand review you should see less mismatched assets. And yes, we recommend an annual brand review to spot check your assets for consistency.

A – Attainable: While it's nice to have a graphic designer build this, you can easily create one using something as simple as Canva. Keep it short and graphically accurate to your brand.

R – Realistic: The hardest part of this project is company-wide adoption. Be strict and make sure managers know how to compare deliverables with this cheat sheet. Everything should look, sound, and feel like your brand. If it doesn't, managers should use this guide to explain to staff where it doesn't match.

T – Timely: The creation of this asset doesn't take long but reinforcing its adoption will take the full quarter.

Marketing Execution Rocks

Rock: Set up marketing tracking

Tracking is often overlooked, but it should be a priority across the organization. Make sure everyone is clear on the definition of "conversion" for example. Sounds basic, but we see it missing all the time.

Feel free to cut, paste, adjust, and use for your next Quarterly Rocks:

Rock: Set Up Marketing Tracking

V – Vision: You can't get core metrics and KPIs without first setting up your tracking so you have accurate data. You need the data for the KPIs to track progress to your vision.

S – Specific: Set up, test, and validate digital marketing tracking for conversions.

M – Measurable: Conversions are technically defined and tested (likely form submissions, calls, transactions).

A – Attainable: Marketing staff will need to set up (or learn how to set up) conversions via Google Analytics, Google Tag Manager, and the website (and often call tracking tools).

R – Realistic: Start with digital marketing conversions using existing tools. For example, if you do not have call tracking set up, that will not be part of this Rock.

T – Timely: You likely have the resources in place to ensure this can be completed within 90 days including time for testing and validating the tracking.

Feedback

What marketing Rocks have you seen work well? Do you need help developing a Rock for a particular use case?

We want to hear from you!

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