

Re  
think  
your  
Marketing  
Goals

Workbook

# Goal Setting, Management & Achievement

## The Power of Marketing Goals

A study by BetterWorks, a developer of strategic planning software, found that organizations that use formal goal setting exercises are 3.5X more likely to be in the top tier of financial performers every year. The same research found that only seven percent of employees understand their company's business strategies and what is expected of them to help achieve company goals.

Businesses that excel at goal management set themselves up for success. Those that don't risk weakening their competitiveness, as they become "busy being busy."

Why are goals so powerful? Goals *compel* action. Goals harness your team's energy in a single, targeted direction that delivers a compound effect, providing you with a competitive edge.

With this in mind, it's important to learn effective goal setting for your marketing team. Use this workbook to organize your marketing goals and ensure greater goals achievement.

## The Art of Setting Bold Goals

When setting goals for your marketing team, think big. If you set goals that are too easily achievable, the team winds up underperforming its potential. By establishing ambitious goals, team members are more motivated, expend more energy, and are more persistent in pursuing the goals.

With easy-to-reach goals, you are likely playing in an area of the market where competition is most fierce. With bold goals, you are typically fighting it out against fewer competitors, increasing your probability of success.

## Measure Everything

"What gets measured, gets done" has been a popular management mantra for years. With marketing goals, it's absolutely critical to establish clear goals and then to measure and report on them consistently so that progress can be tracked and the data can be analyzed to determine any changes in the action plan that will lead to accelerated or optimized performance.

# Are Your Marketing Goals Documented?

Brainstorm and list potential marketing goals for the coming year here.

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## Narrowing Your Focus

Prolific achievers such as Steve Jobs commonly narrow their focus to no more than three goals at any one time. Jim Collins, author of *Good to Great*, states, “If you have more than three priorities, you have no priorities.”

In the book *The 4 Disciplines of Execution: Achieving Your Wildly Important Goals*, authors Sean Covey, Chris McChesney, and Jim Huling write, “Basically the more you try to do, the less you actually accomplish...The sun’s scattered rays are too weak to start a fire, but once you focus them with a magnifying glass, they will bring paper to flame in seconds. The same is true of human beings – once their collective energy is focused on a challenge, there is little they can’t accomplish.”

Now it’s your turn to narrow your focus. In order to better ensure the achievement of your marketing goals, prioritize your list of goals and reduce them down to your top three.

# Stretch Goals

Among all of your goals, list only your top 3 stretch goals for the coming year here.  
*(A stretch goal is a daring, ambitious goal which you do not necessarily know how to achieve at the time the goal is established.)*

#1	
#2	
#3	

## SMART Goals Enabling Stretch Goal #1

Goal in Specific Detail	How It Will Be Measured?	Achievable?	Relevant/ Important?	Deadline	Who Is Responsible?

# SMART Goals Enabling Stretch Goal #2

Goal in Specific Detail	How It Will Be Measured?	Achievable?	Relevant/ Important?	Deadline	Who Is Responsible?

# SMART Goals Enabling Stretch Goal #3

Goal in Specific Detail	How It Will Be Measured?	Achievable?	Relevant/ Important?	Deadline	Who Is Responsible?

# Tasks

Goals clarify what you aim to achieve. In order to accomplish your goals, there are going to be certain enabling tasks as well that should be carried out on a regular basis.

For example, if you aim to increase revenue for a specific service by 30% within six months, you may want to conduct a regularly scheduled analysis of website traffic per source compared to leads volume, or to order and revenue volume. You would then require a process for turning insights from such analysis into specific actions to boost performance.

These tasks are not goals in and of themselves, but they help you to form an infrastructure for the management and achievement of your goals.

## Quarterly Tasks

Task	The Goal This Task Supports	Schedule	Success Metrics	Measurable End Result of Task	Who Is Responsible?



# Weekly Tasks

Task	The Goal This Task Supports	Schedule	Success Metrics	Measurable End Result of Task	Who Is Responsible?





# Other Important Factors



**Are Your Goals Documented and Accessible by Team Members?**



**Does Your Team Have Sufficient Budget Allocated to Realistically Achieve Your Goals?**



**Is There a Feedback Loop in Place as to Track Progress Towards the Goals?**



**What Reporting Protocols Exist?**



**Have You Configured an Online Dashboard to More Easily Monitor Performance?**



**Which Performance Metrics Will Be Assessed Daily? Weekly? Monthly? Quarterly?**



**Have You Scheduled Recurring Time for Analysis?**

# Rethink Your Marketing

*Rethink Your Marketing: 7 Strategies to Unleash Revenue Growth* arms you with seven strategies to identify the specific levers of your marketing that will lead to new growth, enabling you to cut through the noise to what truly moves the needle.

The book includes marketing wisdom from more than 50 companies. Want to know how Domino's created the fastest-growing restaurant in the U.S.? Want to know how Eloqua went from near bankruptcy to being acquired for \$871 million? Want to know how Legendary Entertainment is utilizing its applied analytics team to upend the way the entire movie industry markets films? Want to know how Tough Mudder is plotting the brand's future growth? This book's got you covered!

Read *Rethink Your Marketing*, and learn to transform your business.

For a continual flow of marketing ideas and insights, sign up for the mailing list:  
<https://RethinkYourMarketing.com/>

Purchase *Rethink Your Marketing* on Amazon:  
<https://www.amazon.com/Rethink-Your-Marketing-Strategies-Unleash/dp/0999184709/>

## About the Author

Tom Shapiro is Founder and CEO of Stratabeat (<http://stratabeat.com/>) a branding, design, and marketing agency in the greater Boston area. Through his career, Shapiro has developed marketing strategies for startups, midsized companies, and more than a dozen Fortune 500 clients including Hewlett-Packard, AT&T, Intel, Kraft Foods, eBay, Ameriprise, UnitedHealthcare, and P&G.

Previously, Shapiro was Director of Digital Strategy at the digital marketing agency iProspect. During his five years at the firm, the number of employees grew from 85 to more than 700. Prior to that, Shapiro was responsible for the U.S. go-to-market strategy for a British software localization firm, tripling overall revenue for the company.

Shapiro's marketing insights have been published in CMO.com, CNN, Forbes, HubSpot Blog, iMedia Connection, Innovation Excellence, MarketingProfs, MediaPost, National Center for the Middle Market, Website Magazine, among others.

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