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CMO Council

Creating your 100-day plan

Today's CMO Council leader

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Executive in Residence
Scale Venture Partners

Today's Agenda

- Welcome, introductions (20 min)

- Preparing for your annual plan and/or creating your 100-day plan (30 min)

- Discussion: What is the CMO's role in corporate planning and what are your tips? (30 min)

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We help our portfolio build and optimize hyper-growth GTM machines
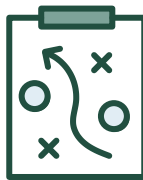
What is the GTM Advisory?

Advisory

Been-to-market expertise

Advising over 55% of the portfolio with bespoke GTM consulting

Content

Step-by-step guides

Distilling decades of experience into 80+ practical tools and frameworks

Events

The power of community

Connecting EIRs, advisors, and portcos at 40+ events per year

GTM Lounge during Dreamforce ([RSVP link](#))

? What   All-day lounge where you can take meetings, network with GTM leaders, and join informal small group sessions (e.g., CMO Breakfast with Maria, Craig and Carilu)

◎ Where   106 Natoma St

🕙 When   10am to 6pm on Wednesday, September 18th (CMO Breakfast starts at 10am)

Introductions

1. Name
2. Title
3. Company
4. How you're engaging with other CMOs and what CMO events you'd like to see from Scale

Agenda

1. Corporate Planning
2. 100 Day Plan
3. Market Discovery Template
4. CMO Tips
5. Your Turn - Your Ideas

Corporate Planning

1. Mission and Vision
2. 3 Year Plan
3. 1 Year Plan
4. Metrics to support 1 Year Plan Success

Note: notice this isn't a spreadsheet from finance

Cisco's VSEM Methodology

V — Accelerate profitable growth throughout the North American sales organization

S — Deploy the 80/20 Business Process within my area of responsibility and focus my team's resources on the best opportunities available to us

Improve 80/20 Thinking
Develop and deploy 80/20 on an ongoing basis

Increase 80/20 Engagement
Improve Awareness, Relevance, and Communication of AM's

Execute Growth of the 80's
Contribute to revenue growth by focusing on our best opportunities

E —

Five part plan to deploy 80/20
-Design: Ensure the right process
-Performers: Knowledge, skills, and behavior
-Ownership: Identify team, expectations
-Infrastructure: Reports, hiring, rewards geared to 80/20
-Metrics: Regular tracking and feedback

Engagement activities:
-Have team and plan in place by 1/31
-Establish weekly meetings with notes
-Include staff from all departments
-Weekly progress letter to team on metrics, momentum, and milestones met

Growth activities:
-80 to the 80's
-Determine "sales effort allocation" to be devoted to each Green
-Have each AM "live the life" of a customer
-Specific plans by account to grow share of wallet

M —

-# of positive mentions of 80/20
-% of steps documented
-80/20 $ impact

-Periodic culture survey
-# of weekly meetings held
-# of milestones set

-Number of Green accounts
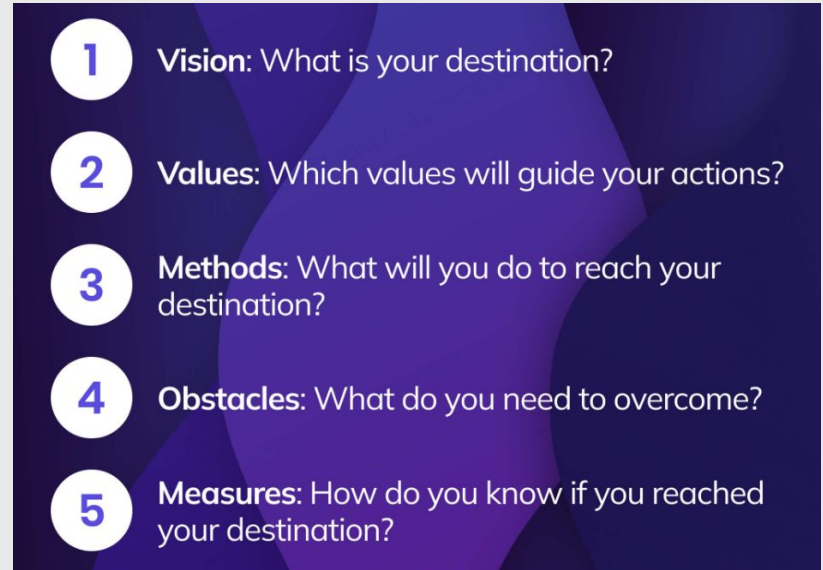-Share of wallet of Greens
-Sales effort allocation %

The VSEM Approach

- Identifies a picture of what success will look like without functional silos

- Highlights the value of a company, team or individual

- Team members understand what each brings to the endeavor

The Business of IT Blog

The VSEM (Vision, Strategy, Execution, and Metrics) Framework Explained

Other frameworks

- OKRs, V2MOM, 4DX, EOS®, and SMART are all alternative methods

- Ensure objectives can be cross-functional and set at a corporate level

- Budget should align and be presented by objective

1. **Vision**: What is your destination?

2. **Values**: Which values will guide your actions?

3. **Methods**: What will you do to reach your destination?

4. **Obstacles**: What do you need to overcome?

5. **Measures**: How do you know if you reached your destination?

Tips

💡 Don't start with the **budget from finance** - get ahead of this now

💡 Plan after **corporate imperatives are clear**

💡 Consider **zero-based budgeting**

💡 **Reality-based successes** are celebrated above spend-based or team-size successes

💡 Creating the organization **based on the goals**
- Teams have shared goals
- The CMO owns no goal individually
- Any goal not assigned is the job of the CMO

"Market"-ing

**Special thanks to
Carilu Dietrich, Mini Peiris,
& Sydney Sloan who all
shared past 100 day plans
so I could present today :)**

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The 100 Day (or Annual) Plan

Do:

- **Research:** start with current corporate goals (like a VSEM), investor deck, sales deck, and review of the market
- **Interview with purpose:** start with the plan in mind and speak with the team, analysts, customers, and partners
- **Create a perspective:** explain how marketing can impact that perspective
- **Explain your approach:** how you would interact cross-functionally, augment the marketing team, and leverage the customer base to create the needed outcome

Don't: <u>state the obvious</u>

The 'Market' Process (and Template!)

Metric	Definition	Source	Company A		Company B		Company C		...
			Value	Notes	Value	Notes	Value	Notes	Value
Website									
Description / tagline	Company's advertised description of itself on its website	Company website	Unlock your team's productivity with the modern		Company B's email engine helps you automatically		Build better relationships with your team, your		
Linkedin Description	Company's advertised description of itself on LinkedIn	Company LinkedIn	The official Company A account. We're on a		At Company B, we empower you to prioritize, categorize,		Helping companies delight their customers, teams, and		
Customers	Number of customers	Company press release	12,000	Includes 50 of Fortune 500	2,000		2,500	32000 free	
Events Listed (in person & digital)	Number of listed events	Company website	1	Only flagship event; no other events listed	10	Global focus	15	5 in person; 8 virtual	
Webinars Recordings	Number of available webinar recordings	Company website	150		30		0		
Customer Page (Y/N)	Existence of a page with customer stories / logos	Company website	Yes		Yes		Yes		
Customer Videos/Case Studies	Number of available customer case studies	Company website	140	All stories; needs more of a focus on the enterprise	60	All stories	100	Stories / blogs	
Press Releases	Number of press releases	Company website	25		125		200		
Glossary for SEO (Y/N)	Existence of a glossary at the bottom of page for SEO purposes	Company website	No		Yes		Yes		
Newsletter (Y/N)	Existence of a regular newsletter	Company website	Yes		Yes				
Subscription Center (Y/N)	Existence of an email subscription center (web page with list of mailings / newsletters)	Company website	Yes		No		Yes		
Vertical Content (Y/N)	Existence of industry-specific content	Company website	No		No		Yes		
Persona Content (Y/N)	Existence of content specific to certain functions or job roles	Company website	Yes		Yes		Yes		
Pricing Published (Y/N)	Existence of published pricing tiers (with or without dollar figures)	Company website	Yes	No dollar figures	No		Yes		
Podcast (Y/N)	Existence of a regular, active podcast	Company website	Yes		No		No		
Chat Bot (Y/N)	Existence of a chatbot on the company's website	Company website	Yes		Yes		No		
Demo as Primary Call to Action (Y/N)	Website's primary call to action is booking a demo	Company website	No	Secondary	Yes		Yes		
Annual Conference	Name of annual conference (if one exists)	Company website	InboxCon		Email-palooza		Company C Summit		
Wikipedia Page (Y/N)	Existence of a company-specific Wikipedia page	Company website	No		Yes		Yes		
International Sites	List of other languages / countries for which company has a site	Company website	Spanish		Japanese, French, German		None		

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CMO Tips

- 💡 Your first team is the **leadership team**
- 💡 Set-up for **scale**
- 💡 Experience versus playbook
- 💡 **Structured** informational interviews
- 💡 Play-to-win versus fail-fast
- 💡 Celebrate **non-visual diversity** to align the team
- 💡 Close the loop and **create context** to bring everyone along
- 💡 **Squads** surround key initiatives
- 💡 Organize to **outcomes**
- 💡 Know where **your CEO gets their info**
- 💡 Don't get stuck in **small** optimizations or audits
- 💡 Use your **network**

Internal Informational Interviews

- Personal Expectations

- Burning Imperatives

- Where to Play

- What Matters

- How to Win

- How to Connect

Sample Interview Questions

I'm looking forward to our first discussion. Attached is the 1:1 form we'll use for our meetings. Great if you can fill this out to help get me up to speed. Also, during our first meeting it would be great for you to bring:

- Your team's current org chart plus any key vendors or contractors you use
- Your annual MBOs and success to these (okay if priorities have caused actual results to differ from MBOs)
- Your budget and utilization of budget to date (ideally with results to budget as well as forecast for utilization through year end)
- Your success to date (i.e. any reports, dashboards, etc. you use to measure success)
- Tools you use (i.e. marketing technology stack)
- Any key calendars, templates, etc. that you use to communicate within or outside of marketing

During this meeting I'll also be asking questions like:

- What meeting is the most important that you attend regularly?
- What person or team do you work with the most outside of marketing?
- What tips do you have for me to get started? What's the biggest thing I can do to create success for you or the team?
- What is your favorite customer story and why?
- What do I need to watch out for (i.e. things we've tried that haven't worked, ineffective things you've seen other people do when they start)?
- How do you stay up-to-date inside the company? How do you stay up-to-date with marketing trends or best practices outside the company?
- What haven't I asked that's important for me to know to do my job well?

For my first meetings with non-marketing team members, I'd love if this note was included in the invite so everyone can prepare. Note - this group does NOT use the 1:1 form.:

I'm looking forward to our first discussion. During our first meeting I'd appreciate you sharing:

- Your team's goals and how you measure success (so I know what you're trying to achieve and how you measure that success). I'll be asking how I can help you achieve these goals. This includes what data you need from my team to ensure you have what you need.
- Who is on your team and in particular, which people should I make sure I meet?
- What you think the overall role is for marketing, and what are your overall perceptions of marketing (inside and outside of Anaplan)?
- What are your interactions with marketing and who you work with the most? I'll be looking to hear which marketers you think are great, and where you think we need more help.
- What is your favorite customer story and why?
- What tips do you have for me to get started and what's the biggest things I can do to create success for marketing in both the short and long term?
- What do I need to watch out for (i.e. things we've tried that haven't worked, ineffective things you've seen other people do when they start).
- How do you stay up-to-date inside the company and inside our industry?

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Sample Meeting Structure

In marketing:

- Monthly marketing meeting (all direct reports and all their team members), outside participants include those that liaise with the team (like an HR business partner)
- Bi-weekly 1:1 with direct reports (typically 20 or 45 mins) - these meetings include the 1:1 form in the invite
- Bi-annual or quarterly 1:1 (20 mins) with all other team members - these meetings include the 1:1 form in the invite

Outside of marketing: This seems like a lot, so I'll be trying to figure out what I can reduce here when I meet with everyone for the first time. Right now I just want to make sure I get an intro meeting with each of these people/groups.

- Monthly 1:1 with CSO or head of sales (Paul)
- Monthly 1:1 with head of product (Sampath)
- Monthly 1:1 with head of customer success (Simon)
- Quarterly meeting with all regional leaders and sales leaders (i.e. head of NA sales, GM for EMEA, etc.)
- I'm guessing I'll do monthly 1:1s with the line of business leaders (I think there are 3 - like Jason Loh)
- Weekly meetings with recruiting lead - hiring is always a huge priority for me
- Quarterly finance review that includes CFO (prior to any internal QBRs to make sure we're all on the same page)

7 Reasons It Doesn't Work*

1. **Organizational:** Lack of a winning strategy (or ability to implement that strategy)

2. **Role:** Expectations and resources

3. **Skills:** Gap in motivation or fit

4. **Relationship:** Failure to build key relationships

5. **Learning:** Failure to gain adequate information or knowledge

6. **Delivery:** Failure to build a high performing team or deliver results

7. **Adjustment:** Failure to see or react to situation change

*From The New Leaders 100 Day Plan

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Discussion

What is the CMO's role in corporate planning and what are your tips?

Selection of open roles in the portfolio

Socure — **VP of Product Marketing** ([link])

BLAND.AI — **Customer Success Manager** ([link])

AppOmni — **Senior Director, Growth Marketing** ([link])

OBSERVE·AI — **Director of Product Marketing** ([link])

walkme — **Director of Growth Marketing** ([link])

Please send referrals to Mark (mark.gustaferro@scalevp.com)

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Thank You!

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