



Your Iterative and Agile Marketing Plan Playbook!



How to Use This Template

This template should be used as a quarterly improvement launch point for your company's marketing plan. Use the sections listed below to customize your agile marketing approach.



Once you're ready to begin, follow steps 1–5 sequentially!



1. List ALL marketing activities

Exercise: Write down all your marketing activities

Tip: Collect tasks and briefly described aspirations from presentations and spreadsheets you have lying around. Take into account all campaigns, programs and collateral... all everything!

Result: A comprehensive overview on all marketing activities.

Example results: One of our customers found 183 separate activities in total.

2. Distill your marketing goals

Exercise: Allow your activities to better influence your marketing goals

Tip: Define your North Star goal. Use a Goal Canvas and distribute your activities around the group. The canvas encourages you to think about what goals you are trying to achieve by looking at the activities you've noted.

No need to fill out the entire Definition of Success just yet. But at least specify "I want to..." and "I aim for...". Then try to specify "so I can..." to distill your (provisional) marketing goals.

Share the canvas to give everyone involved a chance to improve the goals. It will spark interesting conversations and knowledge sharing!

Result: A complete overview on all marketing goals that are made SMART.

Example results: One of our customers formulated 14 goals in total.

3. Connect goals into a strategy

Exercise: Map the goals you just formulated.

Tip: Categorize the goals according to a funnel structure. Document (*draw*) your funnel and place your goals to each funnel category you think they fit best.

Result: A tree of goals that add up to the main goal of your marketing plan. Don't worry if you can't allocate a portion of the goals.



Example results: One of our customers came up with 4 categories: Awareness, Grow, Keep, Internal.

4. Make your strategy slim fit

Exercise: Remove all goals and activities that do not align with the strategy.

Tip: To know if goals align with strategy, ask yourself if they drive revenue, user engagement, or customer loyalty, either directly or indirectly. If the goal does not drive any of these key outcomes, get rid of it! If the activity does not drive a goal (indirectly), get rid of it!

Result: Your lean & mean strategy documented, centralized and in-motion! No more noise and confusion.

Example results: One of our customers found that 60% of goals drove revenue (indirectly). 10% was parked. 30% was misaligned and thrown out!

5. Test, Measure, Iterate

Exercise: Measure execution and goal attainment as a benchmark against your North Star strategy.

Tip: Put the goals that survived the cut into your Better Monday customization form. These goals will turn into automated recipes that drive strategy iterations. You'll automate discovery of where your blood, sweat and tears will have the most effect on achieving company goals. ***Only paid users of the Better Monday Report have access to the customization form.*

Result: All strategic goals (for the next quarter) have an effort estimation. Calculate your resources against the required resources.

Example results: One of our customers found they needed to narrow team focus to meet the company goals.

What are you waiting for? Schedule your [45-Min Marketing Workshop!](#)

