



## Pre-Hire Performance Plan - Vice President of Marketing

The following describes the key performance expectations/results that need to be achieved for the employee to be considered a successful hire.

### Context:

This role is being created to elevate the influence of the marketing function inside the organization. The work that is being assigned to this role was previously performed by a partnership between the President and the VP of Sales and it has been decided to create a role that would be dedicated exclusively to the marketing function. The intent is for this function to grow in its contribution and influence throughout the company, which historically has been more sales than marketing focused.

## KEY PERFORMANCE EXPECTATIONS

- **By End of First 3 Months Employee will have....**
  - **Learned Key Business and Operating Norms**
    - Fully Acquainted themselves with the company's strategic plan, particularly those initiatives where marketing plays a role.
    - Learned how executive team works together – communications, collaborations, resource and budget management protocols.
    - Engaged with the VP of Sales re: current product and product delivery innovations.
    - Gained solid understanding of marketing needs, positioning themselves to provide sales team with short term marketing content support PLUS gathering up information needed to update a marketing performance plan.
    - Become an active participant in discussions with President and VP of Sales that will provide the historical relevance of current branding and messaging strategies.
  - **Established the Leadership Role on the Marketing Team**
    - Organized work to focus on short term lead generation and sales conversion issues. At the micro level, will have fixed known issues impacting results, identified, and found solutions for process gaps, offered insights to expedite individual outcomes - all while building the team's confidence and competency levels.
    - Worked collaboratively with team members to clarify role and performance needs, establish communication protocols and cadences, create needed workflows, etc.

- Meet individually with each team member to assess their strengths/weaknesses, identify turnover risks and future staffing needs.
  - **Become an Active Participant on the current “Revenue Team”**
    - Position Marketing to proactively support important revenue relevant projects.
      - Prepare new or upgrade current collaterals to meet immediate sales and service needs.
      - Propose and progress sales and service relevant collaterals specific to different phases of the sales process and the customer experience.
      - Plan and participate in activities to enhance organizational awareness of marketing capabilities and contributions.
    - Work with VP of Sales to create and utilize common vocabulary to describe and address issues with marketing’s performance that overlap with sales.
      - Partner with sales on pipeline definition project; CRM clean ups.
  - **Established Marketing Relevant Metrics**
    - Develop marketing relevant metrics and dashboards to provide visual access to key measurements of marketing performance (leads, qualified leads, converted leads, etc.)
    - Create an analytics framework that will capture relevant client and prospect data to be used to expedite the sales process and to target future revenue opportunities.
  - **Secured Executive Buy-in.** In a series of monthly “guest” presentations to the Executive Team will have laid out their observations of current marketing performance, “fix/change” projects, and future “build” plans. The executive team will be “in the know” about the vision for marketing and the roadmap being taken to improve marketing contribution.
  - **Worked in partnership with the President to...**
    - Identify and evaluate third party vendor(s) who can support efforts to improve the company branding and messaging strategies.
    - Develop a “creative bench” of free lancers and third-party vendors who, in aggregate, can support creative projects originating from marketing or sales.
  - **Identified opportunities to support the ongoing exploration and development of new products or product delivery options** - stay ready to support ongoing iterations of product prototypes, and product launches.
- **By end of First Six Months, will be tackling both the “fix” and “build” elements of their role....**
  - **Marketing Infrastructure will have been created to align with the Strategic Plan – both short term and long-term initiatives owned by Marketing...**
    - A midyear marketing plan will have been developed and presented to the executive team.
      - Key outreach activities will have Identified and rationalized - to include an updated events and promotional calendar; a content development and digital delivery plan; key operational and strategic improvement priorities, etc.

- Current operational budgets will have been updated to support needed staff and vendor resources.
  - The need for qualified third-party vendors and free lancers will have been clarified and resources onboarded as needed.
  - Marketing metrics and documentation standards will have been matured – CRM kept current; marketing data regularly presented and interpreted to internal stakeholders.
- **The Marketing team and team members will have evolved to a place where they are performing at increasing levels of productivity and contribution.**
  - **Staffing** – key roles will have been established with each role associated with a written job description and KPIs.
  - **Coaching** – with team members will be ongoing, building both competencies and confidence.
  - **Morale** – team members will have high levels of job satisfaction – minimal unwanted turnover.
- **The Revenue Team will be regularly addressing opportunities and resolving obstacles relevant to revenue generation.** Marketing will have a strong presence on that team, ready to support a wide range of revenue relevant projects.
- **The Executive Team will be actively engaged with all things marketing...**and will regularly be updated re...
  - Marketing vision and execution challenges
  - Market segmentation strategies and targeted value propositions strategies
  - Significant adjustments in go to market strategies
  - High impact campaigns and product launches
- **Employee will be having ongoing interactions with President and VP of Sales around the strategic elements of company brand and marketing strategies. Together you will...**
  - Expedite the projects related to brand development, targeted messaging and go to market strategies.
  - Have attended at least one national trade show or end user conference and 4+ client/prospect meetings so as to experience customers and prospects firsthand.
- **By End of First 12 Months the successful employee will have....**
  - **Developed strategic level influence with the Revenue, Sales and Executive Teams.**
    - Marketing will be considered a “thought leader” level influencer – a key player in company’s growth strategies, and a high impact contributor to the company’s growth plan and revenue performance.
    - The Revenue team will have become more proactive in its approach to revenue generation, working as a cohesive team to proactively address shifts in client or market needs.
  - **Matured and Memorialized Most Internal Marketing Operational Procedures** - each role on the marketing team will have an operational manual outlining the how tos of key work activities.

- **Developed a high performing marketing team whose members have a high level of job satisfaction.**
  - The team will deliver an NPS of 50 or higher using “likelihood to leave or stay “metrics.
  - Each team member will have a defined path for professional development with work assignments awarded accordingly.
  
- **Developed a reliably executed Inbound Marketing/Lead Generation strategy** - producing a predictable level of leads and conversions to support revenue growth targets generated from new business.
  
- **Created a library of sales collaterals** – to enable the sales team to enhance the customer experience at all phases of the sales process – pre and post the buying decision.
  
- **Established a System of Marketing Analytics** - **that** is highly visible to all internal stakeholders and used to analyze the success of existing and exploratory marketing, sales, and product development projects.
  
- **Developed a comprehensive Marketing Plan and Budget** – in alignment with company’s strategic plan and annual planning and budgeting processes and encompassing the highest impact demand marketing activities.