

## Optimization Meeting Facilitation Guide

One of the foundational elements of disciplined optimization is having a structured schedule in place. This ensures consistent checkpoints, regular feedback loops, and timely adjustments. Schedule monthly, quarterly and annual optimization meetings with the marketing team to accomplish the following:

- Use **Monthly Analysis** to dive into comprehensive analytics, including customer behavior and competitive insights, optimizing campaigns based on those findings.
- In your **Quarterly Optimization Session** revisit and refine overall marketing strategy, budget allocations, and technology tools based on learnings from the prior quarter.
- Create **Annual Alignment** by assessing the year's performance against strategic objectives, recalibrating the company's marketing vision and budget.

By following this cadence, you can ensure your marketing strategies are not only well-conceived but also rigorously executed and regularly refined.

Monthly Analysis Agenda

Quarterly Optimization Session Agenda

Annual Alignment Agenda

# MONTHLY ANALYSIS MEETING AGENDA FACILITATION GUIDE

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Date: January 1, 2024

Time: 12:00 pm - 2:00 pm (approx. 2 hours)

[Prior to the meeting, dedicate a person who will document any to-dos that come out of the meeting]

## Opening Remarks

**5 minutes**

*Welcome to the Monthly Analysis Meeting. Today we've got 2 hours to review last month's performance, understand the competitive landscape, and review customer feedback. With that information at hand, we'll determine what adjustments need to be made including resources and budget and then finally, set our next month's objectives. At the end of these 2 hours, we will have clear next steps with defined owners and established timelines.*

*To recap, the first hour will be to understand the data, the second hour will be determining what our next steps are based upon that information.*

## Review of Previous Month's Goals and KPIs

**15 minutes**

*During this section, [name] will provide a high-level overview of last month's goals and present achievements and shortfalls. If you would hold any questions to the end, and focus on only questions for clarification.*

## Deep-Dive Analytics

**20 minutes**

*Now that we have a top-level understanding of how we performed, let's take a deeper dive into the analytics. [name] has prepared information re: customer behavior patterns, insights into analytics and campaign results. Again, please hold your feedback for the last half of this meeting and any questions you have should be asked to gain clarity so you make an informed decision in the strategic adjustments section.*

## Competitive Landscape and Benchmarking

**20 minutes**

We've got 20 minutes for [name] to share findings from the competitive analysis and review industry benchmarks as compared to our standing.

### **Customer Feedback and Market Insights**

**15 minutes**

And our last data-review section, [name] will cover customer feedback collected over the past month as well as any integrated market research insights and trends.

### **Strategic Adjustments**

**20 minutes**

Thanks for being so patient, based upon that data, take 5 quiet minutes to document proposed adjustments to our existing strategies.

[begin to solicit team input and ask strong questions to be able to determine the go forward path]

### **Resource and Budget Allocation**

**10 minutes**

Based upon those strategic ideas, let's quickly review what needs to shift in terms of resources and budget. What needs to shift, what dollars need to be reallocated?

### **Set Next Month's Objectives**

**10 minutes**

Based upon what I've heard, our next month's objectives are [x,y,z]. So let's talk about owners and timelines.

[During these 10 minutes, you should define clear, actionable objectives for the coming month that will ensure overall projected MROI achievement, and assign ownership and establish timelines.]

### **Closing and Next Steps**

**5 minutes**

Based upon what we've documented, here are the clear key decisions [x,y,z], let's review the to dos to ensure we clear up any questions. [Review to dos].

That was an amazing meeting. As a note, our next meeting will be on [insert date].

# QUARTERLY OPTIMIZATION MEETING AGENDA FACILITATION GUIDE

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Date: April 3, 2024

Time: 12:00 pm - 4:00 pm (approx. 4 hours)

[Prior to the meeting, dedicate a person who will document any to-dos that come out of the meeting]

## Opening and Objectives

**5 minutes**

*Welcome to the Quarterly Optimization Meeting. Today we've got 4 hours to review our past performance, past quarter's data, and assess our technology and adherence to processes. After our break, we'll focus on the upcoming quarter where we'll start with a content and messaging workshop, set new quarterly objectives and then set new quarterly objects with an action plan to ensure we achieve those objectives.*

*To recap, the first 2 hours will be to understand the data, the last two hours will be determining what our next steps are based upon that information.*

## Review of Last Quarter's Performance

**30 minutes**

*During this section, [name] will provide a high-level overview of last quarter's goals and review key metrics and discuss any insights and learnings. If you would hold any questions to the end, and focus on only questions for clarification.*

## Strategic Market Analysis

**30 minutes**

*Now that we understand the performance, I'd like to take 30 minutes to talk through the market trends, customer behavior, and competitive landscape that may have also impacted our performance.*

*[Be sure to discuss potential strategic implications and opportunities.]*

## Channel and Campaign Deep-Dive

**30 minutes**

Next, we're going to review the effectiveness of each of the channels and campaigns that ran last quarter. [name], if you'd take 10 minutes to walk us through you found the data that supports it.

Now that we understand the data, what do we need to scale, maintain or discontinue?

### **Technology and Process Review**

**20 minutes**

The final step in our quarterly review is to take a look at our marketing tools and processes. Are there any new tools that we need to be investing in or shifting toward to create more efficiency?

Alright, let's review our processes, what needs to be updated, what else is missing, and what needs to retire?

### **Break**

**15 minutes**

Great work. Let's take a 15 minute break.

### **Content and Messaging Workshop**

**45 minutes**

Knowing what we've discussed, we're going to take these next 45 minutes to brainstorm creative campaign ideas and then align our content strategy with updated marketing goals.

[15-20 minutes brainstorm, 25-30 minutes workshop; when workshopping be sure to align both copy and visuals].

### **Set New Quarterly Objectives**

**45 minutes**

Let's set our new quarterly objectives by first defining our SMART goals for the upcoming quarter. A reminder, SMART goals stands for specific, measurable, achievable, relevant and time-bound.

Starting with the first goal.... Alright, what strategies and tactics need to occur to achieve these goals.

*[Note to facilitator: depending on the number of people and goals, you may want to delegate out the smart goals and/or the strategies/tactics to do on independently for 10 minutes and regroup to revise.]*

### **Action Plan and Roadmap Creation**

**15 minutes**

*Based upon what I've heard, next steps over the next quarter are as follows [x,y,z]. So let's talk about owners and timelines.*

*[During these 15 minutes, you should define clear, actionable objectives for the coming month that will ensure overall projected MROI achievement, and assign ownership and establish timelines.]*

### **Closing Remarks and Feedback**

**5 minutes**

*Based upon what we've documented, here are the clear key decisions [x,y,z], let's review the to dos to ensure we clear up any questions. [Review to dos].*

*Before we close out, I'd like to understand what you would rate the meeting on a scale from 1-10, what changes would make this better and what did you like about the meeting?*

# ANNUAL ALIGNMENT AGENDA

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Date: December 15, 2024

Time: 8:00 am - 3:00 pm (approx. 7 hours)

- Create **Annual Alignment** by assessing the year's performance against strategic objectives, recalibrating the company's marketing vision and budget.

## Opening and Objectives

**5 minutes**

*Welcome to the Annual Alignment Meeting. Today we've got a full 7 hours to review last year's performance and determine what adjustments we need to make as well as what new strategies and tactics are needed to achieve our upcoming year's vision and goals. Once those are determined, we'll establish the upcoming year's marketing budget, set KPIs and then create new quarterly objectives. Finally, at the end of our 6 hours, we will outline any remaining action items and close out the meeting.*

*So without further ado - I'll hand it over to [name] who will review last year's overall performance against our strategic objectives.*

## Review of Last Year's Performance

**30 minutes**

*During this section, [name] will provide a high-level overview of last year's goals and review key metrics and discuss any insights and learnings. If you would hold any questions to the end, and focus on only questions for clarification.*

## Strategic Market Analysis

**30 minutes**

*Now that we understand the performance, I'd like to take 30 minutes to talk through the market trends, customer behavior, and competitive landscape that may have also impacted our performance.*

*[Be sure to discuss potential strategic implications and opportunities.]*

## Channel and Campaign Deep-Dive

**30 minutes**

Next, we're going to review the effectiveness of each of the channels and campaigns that ran last quarter. [name], if you'd take 10 minutes to walk us through you found the data that supports it.

Now that we understand the data, what do we need to scale, maintain or discontinue?

### **Technology and Process Review**

**20 minutes**

The final step in our annual review is to take a look at our marketing tools and processes. Are there any new tools that we need to be investing in or shifting toward to create more efficiency?

Let's review our processes, what needs to be updated, what else is missing, and what needs to retire?

### **Break**

**15 minutes**

Great work. Let's take a 15 minute break.

### **Review Next Year's Strategic Objectives**

**30 minutes**

As we approach the end of this year, it's crucial for us to start looking ahead and planning for the future. Today, I'm excited to share with you our goals and vision for the upcoming year. This is a crucial moment for us to align our efforts, set clear objectives, and work together towards our collective success

### **Determine Marketing Strategies to Meet Strategic Objectives**

**60 minutes**

Ask the group the following ten questions about each the proposed strategies.

- **Grounded in research:** *Is this strategy grounded in the research? How so?*
- **Feasibility analysis:** *What are the potential obstacles in implementing this strategy, and how can we overcome them?*
- **Alignment check:** *How does this strategy align with our overall business objectives and brand values? How does it align with the sales team's strategies*

*and goals? Will this strategy positively impact the outcomes of any of our other top strategies under consideration?*

- **Market impact:** *What is the expected impact of this strategy on our market position and competitive edge?*
- **Customer value:** *How will this strategy improve our customer's experience or journey?*
- **Innovation index:** *Does this strategy introduce innovative practices to our marketing efforts?*
- **Customer journey:** *Where in the customer journey would this strategy be most useful?*
- **ROI detailing:** *Do you agree with the ROI projections for this strategy? Where might they be flawed?*
- **Risk assessment:** *What are the risks involved with this strategy, and how do we plan to mitigate them?*
- **Scalability query:** *Is this strategy scalable, and how does it fit into our long-term growth plans?*

**Lunch**

**60 minutes**

**Set Annual Marketing Objectives, KPIs and Budgets**

**60 minutes**

*Welcome back from lunch! We are going to dive into setting our annual marketing objectives, KPIs and budgets. Think of like the one year plan to hit next year's strategic objectives. I want everyone to take 15 quiet minutes to review what we set for last year and our performance against those objectives. Think about the assumptions that we made and what you would repeat versus what you would do differently. Document a list of recommendations in your worksheet*

- *What you believe the breakdown of our annual objectives should look like*
- *What KPIs you believe are critical to know we're on-track*
- *What you recommend we put in the budget to support this plan*

*[At the end of this time]*

Come on back to the group. Don't worry if you're lists aren't complete. We're now going to split into three groups, run a keep/kill/combine exercise to create a merged list of recommendations. As soon as you're done have one rep from each group document your list on the flipcharts.

As a group let's debate and prioritize. Continually ask yourself

- *Is this metric critical to our success?*
- *How will this KPI warn us if we're in jeopardy of missing our annual goals?*
- *Is this the most aggressive and efficient budget?*
- *What happens if we fail?*

## **Break**

**10 minutes**

## **Setting New Quarterly Objectives**

**45 minutes**

*Set new quarterly objectives by first defining SMART goals for the upcoming quarter. A reminder, SMART goals stands for specific, measurable, achievable, relevant and time-bound.*

*Start with the first goal and identify what strategies and tactics need to occur to achieve these goals.*

*[Note to facilitator: depending on the number of people and goals, you may want to delegate out the smart goals and/or the strategies/tactics to do on independently for 10 minutes and regroup to revise.]*

## **Action Plan and Roadmap Creation**

**30 minutes**

*Based upon what I've heard, next steps over the next quarter are as follows [x,y,z]. So let's talk about owners and timelines.*

*[During these 30 minutes, you should define clear, actionable objectives for the coming month that will ensure overall projected MROI achievement, and assign ownership and establish timelines.]*

## **Closing Remarks and Feedback**

**5 minutes**

*Based upon what we've documented, here are the clear key decisions [x,y,z], let's review the to dos to ensure we clear up any questions. [Review to dos].*

*Before we close out, I'd like to understand what you would rate the meeting on a scale from 1-10, what changes would make this better and what did you like about the meeting?*