Strategy guide:
How to build, nurture and retain the ultimate marketing team



B2B Marketing

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Introduction

'You're only as strong as the team around you.' Let's be honest, we've all heard this kind of saying before. But is it empty, HR-inspired fluff or a pertinent reminder of the importance of recognizing the value of teams? In our opinion, definitely the latter. And as ambitious B2B marketers with one eye on promotion, a top priority should always be the team around you.

Knowing how to assemble a stellar team (and, crucially, keep hold of them) will often be what sets you apart from other senior leaders and managers. Why? Because the intrinsic success of a department is irrefutably tied to the team itself: its shared skillsets, its cohesiveness and its unswerving alignment to shared goals – both departmental and organizational.

This practical 28-page guide will provide the information, templates and checklists you need to build, nurture and retain the ultimate B2B marketing team, looking in detail at skills gap identification, team culture, recruitment and professional development. In it, you'll find:

- Skills map templates
- Top tips on everything from embedding culture change to the onboarding process
- Revealing research findings.

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1. Doing your prep



"By failing to prepare, you are preparing to fail," said United States founding father and all-round mastermind Benjamin Franklin. He was, of course, entirely right. Before you start tinkering with your team's structure or drafting new job descriptions, have a think about what you're looking to achieve with your team this year. Consider:

- **Business goals**
  If, for example, your board's keen to maintain revenues while lowering costs over the next three years, proving ROI will be ever-more important. Ensure you've got the right experts on board to make it happen.

- **Marketing goals**
  Your overall marketing goal may be to improve brand recognition, crack a new sector or increase the number and quality of leads – if it's the latter, you may need to assess your team in terms of email marketing and programmatic if this is where the majority of leads are coming from.

- **Your overarching marketing strategy**
  Where will your department be focusing its efforts in the months ahead? Are you focusing on producing better quality content? Or is social a bigger focus? The skillsets you need will be determined by the elements within your strategies and wider plans, so plug the gaps accordingly.

Once you've lined up your key objectives, it's time to improve your understanding of the marketing skillsets.

Look at the list of skills below. Pick out those you consider most important (no more than double your team headcount). This will help you identify what you need in your team and what might be missing.

Hard, technical skills

1. Account management
2. Account-based marketing (ABM)
3. Agile marketing (eg. SCRUM)
4. Ambassador marketing
5. Analytics
6. Branding
7. Campaign management
8. Cognitive marketing
9. Collateral development
10. Community management
11. Competitor/market analysis
12. Copywriting
13. CRM
14. Customer experience (CX)
15. Data collection, analysis and evaluation
16. Demand generation
17. Digital asset management
18. Direct mail (DM)
19. Email marketing
20. Emotional marketing
21. Exhibition and events planning
22. Go-to-market strategy
23. Growth hacking
24. HTML
25. Influencer marketing
26. Internal communications
27. Lead generation
28. Market research
29. Marketing automation (MA)
30. Mobile marketing
31. Neuromarketing
32. New business strategy
33. Paid social
34. Pay-per-click (PPC)
35. PR
36. Predictive analytics
37. Product development
38. Product management
39. Programmatic advertising
40. Proposition development
41. Retargeting
42. SEO
43. Social listening
44. Social media marketing
45. Social media measurement
46. Social selling
47. Strategic development
48. Tone of voice
49. User experience (UX)
50. Video
51. Website design

Soft skills

52. Adaptability
53. Communication skills
54. Conflict resolution
55. Creativity
56. Critical observation
57. Emotional intelligence
58. Leadership
59. Problem-solving
60. Project management
61. Public speaking
62. Teamwork and collaboration
63. Time management

Industry-specific knowledge

64. Technical knowledge of the market in which you operate – you may want to split key topics into different categories o that knowledge isn't pooled in limited areas
65. A good network of internal contacts
66. A strong understanding of competitor brand activity

2. Assessing your team

2.1. Team size and structure

The size and structure of your marketing team will be dependent on your company's size and culture, but it's definitely worth looking at which of the following best suits your way of working. It may not be the structure you're currently wedded to.

A tall hierarchical structure has many levels and a flat hierarchical structure will only have a few

The hierarchical structure

This more common structure sees employees ranked at various levels within the organization, one on top of the other. Each person has one direct manager, but can have multiple direct reports. A tall hierarchical structure has many levels and a flat hierarchical structure will only have a few. Typically, these are pyramid-shaped – they'll require more specialized staff with fewer overlaps in terms of skills and tasks, but a broader understanding of your business and industry. In these organizations, you're likely to have a 'social media expert' and an 'MA expert', for example.

Advantages

- Authority and responsibility is clearly defined.
- Potential promotion paths are clearly defined.

Disadvantages

- Layers of bureaucracy can make decision-making and the pace of change slow.
- Communication across various silos within the team can be poor.
- It can be much tougher to cover staff who are leaving or to respond to a restructure.

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The matrix structure

In this structure the reporting relationships are set up as a grid, or matrix, rather than as a traditional hierarchy on the previous page. Instead of lining staff up along functional, geographic or product lines, they report to a functional manager who helps with skills and work review, and a product line manager to oversee work on product offering. In a marketing team, you're likely to see marketers with specialist technical knowledge, as well as broader and more duplicated skillsets.

Advantages

- Information flows across and up an organization.
- Staff are building relationships with many people across the organization, which improves collaboration and speeds up the decision-making process.
- It's a good way of sharing resources across departments, which can make a project more cost-effective.

Disadvantages

- Sometimes difficult to coordinate and may take individual team members time to get used to.
- Lack of specialization could lead to only basic understanding of certain tools and tactics.
- Lines of accountability and responsibility may not always be clear.
- Having two managers could lead to divided loyalties.

It's worth considering how flat you want your structure to be: a flat organizational structure, as its name suggests, has fewer levels of management between managers, executives, and employees. Communication between employees and management can often be faster and more effective than in tall structures.



2.2. The skills radar map

This map, originally used in sport to chart players' strengths and weaknesses, is a useful way of assessing any skills gaps in your team. It allows you to map out the skills levels of individual team members against what these could and should be, thus emphasizing where further development (or recruitment) needs to take place.

Reading these maps is simple - the skills you need are placed on different points at the edge of the map. Individuals (or your team or requirements) are then given a numerical score, where 0 sits at the very center and your highest possible score (say, 10) is on the edge. The bigger the overall shape created through the scores, the more skilled the marketer.

The map below highlights how this fictional team leader has appraised one of her team member's skills against those that she requires. As you can see, the team member in question (let's call him Julio) is excelling at lead generation and project management, but falls behind when it comes to customer experience and copywriting.

His ability to plan events is also thrown into question. What his manager can do as a result of this is draw up skills radar maps for her other team members to determine whether a lack of copywriting ability is a problem across the team or whether it lies with a couple of individuals only.

Julio's score



Overall team current score

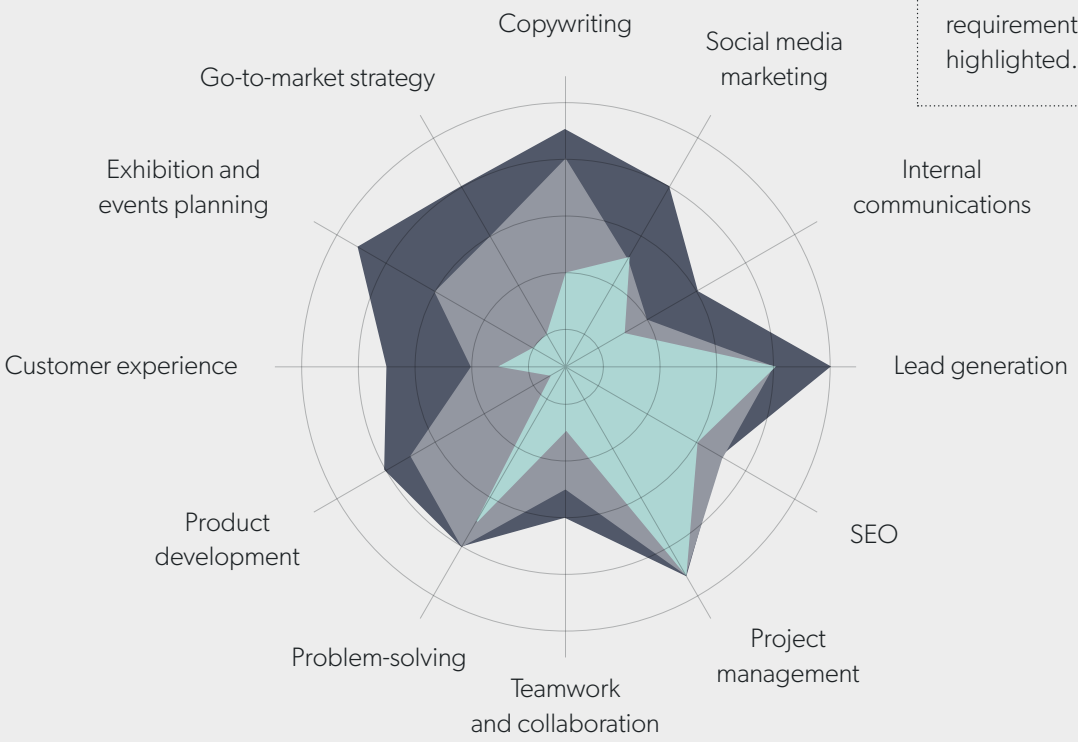


Required score to achieve team goals



Skills gap analysis

By overlaying the skills maps for the individual and the team against your requirements, gaps are highlighted.



Create your own skills map

Use the template below to discover where the gaps lie in your own team – begin by using your preparatory work to draw up your desired skills map before overlaying it with your reality.

Refer to page 5 for our list of suggested marketing skills for your own maps.



3. Analyzing the gaps

3.1 Forming an action plan

By comparing two skills maps you'll be able to easily identify gaps that need to be plugged. It's obviously important to ask yourself:

- Are gaps being revealed across the whole team or with particular individuals?

If the majority of the team needs upskilling in a particular area you can embark on training (either individual or team training). If a particular individual is failing to develop skills in a certain area, you can either invest in training (formal or informal), or look to replace them. Make sure you take such decisions carefully, and consider the advantages and disadvantages of individual training, team training and replacement/redundancy.

Individual training

This is a good option if the individual in question is excelling in most areas but needs to demonstrate improved understanding in one particular topic/area.

Advantages

- Likely to increase individual's responsiveness to learning and development.
- Can be cost effective due to its targeted nature.

Disadvantages

- If you're using an external training provider, this option can (again) be costly.
- Finding the right coach can be difficult.

Consider the advantages and disadvantages of individual training, team training and replacement/ redundancy

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Group training

If your team is demonstrating a collective skills gap in copywriting or social selling, for example, bringing them together for a group training session could be beneficial.

Advantages

- Group training can foster a sense of togetherness and collaboration, almost acting, in some organizations, like a team-building exercise.
- Agreement on a shared goal, to which all training attendees are more likely to be aligned.
- Increased motivation to achieve – through a shared and perhaps more competitive learning forum.

Disadvantages

- Far fewer staff 'on the job'.
- Risk of a lack of creative thinking.

Personnel changes

Making the decision to make a member of staff redundant is a difficult one and should involve both your direct line manager, the board (depending on the individual's seniority) and HR. It may be that the individual in question needs to be managed out, which is a delicate process and one which requires HR's input at all times.

Advantages

- Frees budget for a new hire better equipped to take on the workload and projects ahead.
- Allows you to reassess the team's skills and structure, and possibly move individuals into roles more suited to them or that offer further progression.

Disadvantages

- Redundancy (voluntary or otherwise) can lead to a dip in team morale and increased inclination of team members to move on to pastures new.
- Cost and time spent recruiting and training a new team member can be significant.

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3.2 The potential of marketing agencies

At this point it's worth ruminating on the value of agencies: sometimes the gaps within your team can't easily be plugged – either due to time or resource constraints, or because it doesn't make sense from a forward-planning point of view. So what are the best things about our agency friends? And the worst?

Advantages

- They offer a holistic overview of your campaigns and strategy.
- New ideas – by working with multiple brands, agencies are able to take learning from other campaigns and bring them directly to you.
- Specialist expertize in areas that your team lacks.

Disadvantages

- Can be costly.
- May not have a comprehensive understanding of your business.
- Greater risk of inconsistency in terms of branding and tone of voice.
- May not always deliver on promises.

4. Analyzing team culture

The words used to describe a team's culture too often reveal themselves in exit interviews – and aren't always pretty. So instead of letting team culture be a topic that only surfaces when it's become a problem, proactively consider what yours looks like and how you might improve it.

4.1 Understanding your team culture

Whether you're accustomed to working with HR or not, you'll definitely need their buy-in when it comes to getting a handle on your existing culture – whether that be of the wider business or your team itself. There are a number of tools that you can use to do this, some of which we've listed below.

- **Pulse surveys:** These can give a good snapshot of how people are feeling in an organization, with quantitative questions used to measure engagement.
- **Net promoter score:** This is becoming more widely used, due, in part, to how easily it allows organizations to measure staff engagement levels. Questions include: 'How highly would you recommend this organization to friends and family on a scale of 1 to 10?' Those who give low scores are detractors (rather than positive-scoring promoters) and they are the people you need to focus on helping feel more engaged. Linked to this, do think about who the 'culture carriers' are in your organization. These won't necessarily be senior individuals, but whoever they are, they're worth tapping in to.
- **Employee surveys:** Use a mix of qualitative and quantitative questions to give a really detailed assessment of the culture of the organization. Online tools, which you often have to pay for, can benchmark your scores against competitors and give you breakdowns by department so you can easily pick out areas of concern.
- **Focus groups:** Run these using a cross-sectional representation of the workforce/department. Ask them to describe what it's like working for the organization and allow them to highlight any gripes.
- **Analyse management information:** HR departments can provide all sorts of useful nuggets such as sickness, attrition and vacancy rates. This should help provide a good picture of the 'health' of an organization; if a particular department has high levels of sickness absence and a high turnover, it's likely the culture needs to be urgently looked at.

NPS is becoming more widely used, due, in part, to how easily it allows organizations to measure staff engagement levels

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4.2 Identify where your culture needs changing

You've probably heard of *Culture Eats Strategy for Lunch* by Curt Coffman. In it, we find out how poor company culture can completely derail even the best-laid strategic plans. For this reason, and many others, culture's always worth considering. Poor culture can cause:

- Decline in profits and revenue.
- Inadequate returns on investment.
- Low quality or standards of customer service.
- Low morale.
- Low retention rates and absenteeism.
- Lack of alignment to department and business' wider goals.
- Inefficient ways of working.
- Lack of joined-up thinking and collaboration.
- Change of ownership.

4.3 What makes a strong team and organizational culture?

This is a tricky one to answer as it depends hugely on your company. However, common themes emerge among the most successful organizations out there, which have been neatly identified by Gerry Johnson, currently the chair of strategic management at Lancaster University Management School (LUMS).

- The paradigm: What the organization is about, what it does, its mission, its values.
- Control systems: The processes in place to monitor what is going on.
- Organizational structures: Reporting lines, hierarchies, and the way the work flows through the business.
- Power structures: Who makes the decisions, how widely spread is power, and on what is power based?
- Symbols: These include organizational logos and designs, but also extend to office locations and parking spaces.
- Rituals and routines: Management meetings, board reports and events.
- Stories and myths: These build up about people and events, and convey a message about what is valued within the organization.
- Consider the way your team behaves and conducts itself – from both a process and a behavior point of view.

4.4 Introducing and embedding change

Let's not pretend that changing culture is ever easy. But there are some simple steps you can take to increase your chances of success – many of which are highlighted in our *Agents of Change* Leaders report.

- Build a rational and emotional case for a culture change; highlight the advantages from an employee and wider business point of view.
- Clarify your vision for a new culture, and within that, associated values, processes and behaviors.
- Always link behaviors to business objectives.
- Communicate this vision to the wider team to ensure buy-in.
- Demonstrate impact quickly: everyone loves a quick win.
- Embed change through ensuring senior colleagues are on side.
- Consider the role of performance management, learning and development, and retention program in your overall vision (this will be most likely be HR's remit, but definitely worth bearing in mind).



5. Recruitment



Use your skills map to identify what you require from any new hires. You can also examine your team and company culture to gauge the kind of personality you're after. You may be looking to dramatically shift your culture – in which case, shaking things up with someone different might be a good plan.

Writing the perfect job advert

Work with both your copywriters and HR to create the perfect job description and advert. The two are, of course, quite different. One sells the other and requires imagination and flair, so when it comes to writing the Advertisement consider the following:

- Choose the right job title. Is it as appealing as it can be? There may be little room for manuever but consider the benefits of 'digital marketing manager' over 'digital marketing executive': you may see a different caliber of candidates as a result.

- Explain the role clearly. What are the main responsibilities? If you have examples of how the successful candidate will be delivering on, say, a content marketing strategy, elaborate. Which channels will they be using? Who will their audience be? What would success look like? The more colour you bring to the Advertisement the better.

- Be specific about the job location. Considering it's a city spanning 607 miles, 'London' is actually a pretty vague geographic descriptor. If your office is only five minutes from City Thameslink, say so. Commuting times can be a deal-breaker.

- Outline the person specification. Being as precise and clear as possible will always drive up the quality of suitable candidates. Including 'Essential' and 'Desirable' tags will also help.

- Shout about the perks. Too few companies really sell themselves in job adverts, which is a big mistake. Flexible working, free breakfasts, a contributory pension scheme and childcare day options are all worth highlighting.

- Explain why your company is worth working for. Shout about big successes, including award wins and outstanding campaign metrics.

- Offer challenges as well as rewards. Ambitious candidates like to know that they're going to be part of something that challenges the status quo.

- Don't exaggerate. While highlighting the plus points is a no-brainer, describing your company as something it isn't won't do you any favors. It's also more likely to lead to employee churn.

- Be human. What are you like as a company and a team? Do you tend to go to the bar together on a Friday or socialise mid-week? Do you consider yourselves lively, outgoing and collaborative? People buy from people, and you're selling a job here: make it tangible.

- Include a picture. This will obviously be brand dependent and will hinge on HR and wider company policy. But if you're promoting the role on social channels, as well as your company website, a picture of the team looking jolly can only help your cause.

- Make sure there's a clear call to action. This sounds obvious, but don't make the mistake of asking for applications in one format (eg. a CV) and then regretting that you didn't ask for a full cover letter.



6. Staff onboarding

Too often the onboarding process is pushed to the bottom of the to-do list or cobbled together at the last minute: a couple of introductory meetings are set up and the new hire's expected to dive in straightaway. But the benefits of having a clear and comprehensive onboarding process in place are myriad.

A good onboarding process should:

- Offer the new hire structure and a sense of purpose – engaging employees early on will help you retain top talent. After all, first impressions count.
- Impress upon them the fact that you've thought about their role within the team and their development.
- Give the new hire the chance to take a holistic view of the wider organization: meetings with colleagues across departments are crucial. This will also open up those much-needed channels of communication and encourage cross-fertilization of ideas.
- Give you an easier and clearer way of tracking progress and allow them to flag areas of concern as and when they arise.

The benefits of having a clear and comprehensive onboarding process in place are myriad

6.1 The first 30/60/90 days

The following checklists are designed to give you an idea of what you'll need to cover with your new hire during their first three months in the role. There will, of course, be other points to consider – depending on the role itself – but the below make a good starting point.

The first 30 days

1. Put together a first-week orientation pack. This should outline what the new hire is expected to do; it will also help make them feel welcome.

2. Ensure the manager in question sits down with your new hire regularly (maybe once a day to begin with and then weekly). Outline the role and their responsibilities. What projects or campaigns are you expecting them to work on? Can you ask them to brainstorm ideas in advance of an upcoming design meeting? Take advantage of their newness while you can! And document everything from the get-go.

3. The new hire should be asked to set up meetings with all key stakeholders, as well as team members (depending on team size).

4. Set short and long-term objectives: these may be as simple as reading up on the company or looking at collateral from previous campaigns.

5. Set up end-of-week meetings to run through how the new hire's getting on and answer any questions they may have.

6. Ensure the new hire is familiar with company systems and processes – where to find documents on the shared drive and who to approach for what.

7. Set up a probationary review.

The first 60 days

1. Sit down with the new hire to discuss and assess their familiarity with the organization and role, as well as their overall happiness.

2. Ensure regular meetings are diarized and actions set.

3. Check in with the new hire around training requirements. Is there a particular course or training session you could send them on to ensure they're best equipped to take on any projects or campaigns you have in mind?

The first 90 days

1. This should be where you're beginning to see really positive results from your new hire. Make sure the dialogue continues through regular meetings and ensure you're setting SMART goals. Also bear in mind the fact that the costs of staff turnover in the first 60/90 days can be high – making sure you're meeting their expectations is almost as important as making sure they meet yours.

2. If the new hire isn't performing, now's a time to consider the following:

    - Review how clear you've been in terms of expectations.

    - Have a frank conversation with the new hire outlining where they're falling short. Quantifying the problem is crucial. It could be that they aren't meeting quotas or standards, or aren't following procedures correctly – make it clear where the problem lies, involve HR if necessary and document everything.

    - Review the individual's training. Are there any gaps in knowledge or understanding that could be easily plugged through training or mentoring?

    - Set new goals and timelines, and make sure follow-up meetings are planned in a timely, documented manner.

    - Learn from your mistakes. If you've made the wrong hire, sit down with your HR director to discuss where you went wrong and what you'll be looking for from the replacement.

7. Personal development

7.1 The reviews process

Reviewing employee progress is part and parcel of a manager's role. Ensure new hires are being reviewed as often as you think necessary. Early on, this might be as regularly as weekly; following their three-month probation review it might be bi-annual or annual.

A probation review

This is a chance to track your new hire's progress and flag any areas of concern. In order to assess your employee, you or the manager in question will need to determine what has been expected of them at the various stages of their probation. Make sure these stages are easily measurable – and attainable.

Annual review

Obviously these are heavily personalized to the individual role and organization, but there are some general points to always consider.

- Review the current job/position description – does it currently reflect the role in question? If not, be prepared to suggest updates.
- Speak to those working closely with the employee in question to gain their feedback and insight.
- Bring along notes or documents taken over the year – they may contain important areas of discussion.
- Ensure the 'agenda' for the meeting covers successes, barriers to success and achievements. It may be worth considering whether training or mentoring could be useful going forward.
- Agree upon any action points for the employee in question and, where possible, pull together a realistic timeline, highlighting when objectives need to be completed.
- Remember that the best kind of reviewer will focus on observable behavior, listen, share advice, be honest and document everything!

In order to assess your employee, you or the manager in question will need to determine what has been expected of them at the various stages of their probation



7.2 Internal coaching and mentoring

Is there someone who could act as a mentor for a specific member of the team? The benefits of mentoring or coaching go both ways: the mentee gains knowledge and the inside track, while the mentor feels valued within the organization. Consider who within your team might be looking for progression: giving them the opportunity to mentor (or informally manage) someone is a positive way of offering managerial experience and reinforcing how much you value them.

The terms 'mentoring' and 'coaching' are often used interchangeably, but there are subtle differences between the two.

Mentoring

- Mentoring usually involves an ongoing relationship.
- It can be more informal, with meetings taking place as and when necessary.
- The mentor in question is normally someone who is more experienced and qualified than the mentee. The focus is thus on career and professional development.

Coaching

- The focus is usually on development/issues at work.
- The coach in question doesn't need to have specific direct experience of their client's formal occupational role, unless the coaching is specific and skills-focused.

7.3 External mentoring

There are of course benefits from finding mentors from outside your department or even wider organization. Not only can they offer new and valuable perspectives, but they also relieve the pressure on your own internal mentors – often there just aren't enough to go around!

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8. Professional development



When it comes to putting a training plan in place for employees (and this could be group or individual training, formal or informal) consider both soft skills and hard (technical) skills. When appraising the former, it might be worth liaising with HR to discuss their recommended approach.

Either way, knowing which providers to choose for is crucial:

- Look at their track record: which other organizations are they currently working with and who are their trainers? If needs be, contact other brands for referrals.
- Consider how well they know you: have they demonstrated an understanding of your team culture, your objectives and company values? Tied to this is the question over whether their content is customizable.
- Check whether they're accredited: CPD accreditation is a good place to start.

While considering training, which can certainly be valuable, don't neglect other routes to CPD success, such as events and networking sessions. Peer-to-peer learning can reap big rewards – and make sure team members who've been at a training day or event share their learning with the team once back in the office.

9. Improving team culture

Team (away) days

A sure-fire way of lifting company morale is to organize a team day, which you can choose to focus around training or not – depending on your objectives. Here are some hints and tips:

- Make it interactive: Death by PowerPoint should be avoided at all costs.
- Make it collaborative: Encourage your team to work together and with people that they don't normally work with.
- Take it off-site: The same environment will create the same thinking. Taking people out of the office will encourage them to think in new ways.
- Make it constructive: Use the day to drive and generate relevant ideas and conversation.
- Follow up and follow through: Ensure that things happen on the back of the team day. Don't just ignore helpful suggestions.
- Make it inspirational: The day should be something that people remember. Hiring an inspirational speaker is one way of making it memorable.
- Have fun: Seed happy memories!



10. Retention

Gauging team happiness should be front of mind at all times: clearly you can't keep everyone happy all of the time but you can be mindful of people's general behaviors.

Bear in mind the reasons why people leave marketing roles. Our *Defining leadership in the digital age* B2B Leaders report, published in September 2015, revealed which factors have the greatest impact on job satisfaction:

- Having a stimulating job
- Feeling valued by employer
- Having a healthy work/life balance.

When asked for the reasons why they were looking for a new job:

14%
said it was down to 'poor leadership'

16%
said it was down to 'boredom'

28%
said they felt that in order to progress their career they had to move elsewhere.

Your ability to lead is, of course, at the heart of your team's success. The same report analyzed respondents to define a good leader in their own words. An analysis of these comments revealed that a leader, from an employee's point of view, displays two critical traits:

- A clear, well-articulated vision
- An ability to inspire those around them.

Encouraging open dialogue with your team and investing in your managers will help keep an even keel.

Hopefully this guide has given you the information you need to build a successful, productive and happy team. And remember, in a world where budgets are often being tightened, doing more with less is crucial. The term 'marginal gains' might have been introduced into the public psyche by GB's cycling team, but it resonates in the world of team development too. Imagine your own team's capability in six months. Will the same individuals be able to achieve 20% more with the same resource? Once you have the right team in place, doing more with less will be what sets you apart from your peers and helps you prove your worth at board level.

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