Marketing Roadmap Summit Meeting Agenda

Hosting Preparation

- ☐ Find a day when your team can join you for a marketing roadmap summit.
  Date: _____
- ☐ Book a conference room outside of the office where you typically work.
  Venue: _____
- ☐ Make reservations with a restaurant within walking distance of your venue.
  Restaurant: _____

Gather the items you need to rock a successful summit:

- ☐ White boards
- ☐ Poster-size Post-It notes
- ☐ Normal-size Post-It notes
- ☐ Stickers
- ☐ Dry erase markers
- ☐ Masking tape
- ☐ Stop watch
- ☐ Snacks
- ☐ Drinks
- ☐ Projector
- ☐ Extension cables

Invite your team to the summit with a note that hypes them up because they get to be involved in the planning:

Hey team!

Get ready for a super exciting day to help us plan the next six months of projects, along with the vision for marketing in the next year.

I've got the day under control complete with a cool location outside the office at (awesome venue) and I'm treating all of you to lunch at (super good restaurant).

Some homework for you to think about before we meet... think through the answers to this question:

What are our biggest opportunities to grow our company in the next year?

That will be the basis for our conversation throughout the day, and it's going to be a big one. So some ground rules are to turn off all distractions and to focus on the big wins instead of small details.

This is gonna be fun!

Exercise Preparation

Plan some time before your marketing roadmap summit to explore your marketing funnel for yourself. Ask yourself: What steps do our customers go through from awareness to purchase to retention? Write your notes here:

Before the marketing roadmap summit, review your current project backlog list if you have one. Just because ideas are old doesn't mean they're bad or won't fit your new vision. Write your notes here:

_____:_____ Ice Breaker (10 Minutes)

Remind your team of the purpose and rules. Say this:

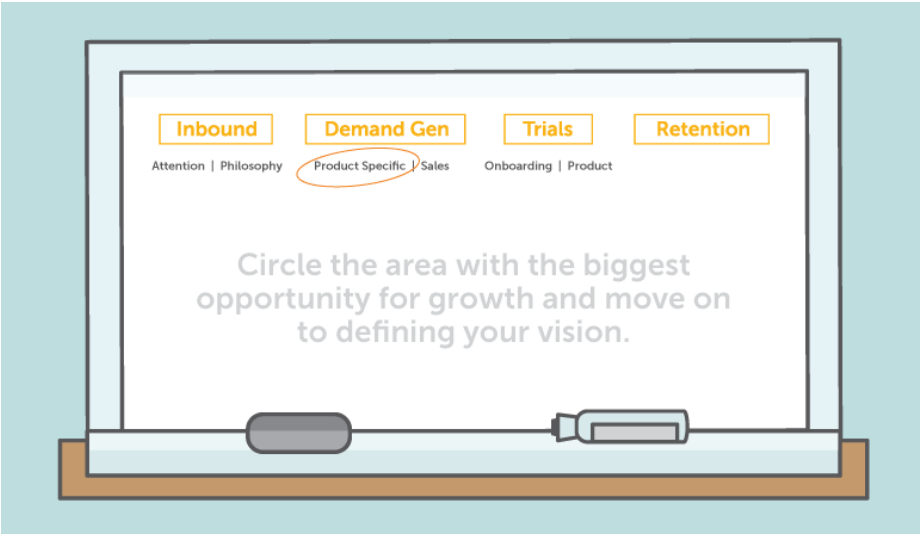
- ☐ The purpose of a marketing roadmap summit is to develop a prioritized project list and vision for the upcoming four weeks, six months, and year.
  - –The next four weeks will be the nuts and bolts, dialed-in version of what we'll create immediately after the roadmap summit.
  - –The next six months will be the concrete plan toward our year vision.
  - –And the next 12 months will be our long-term vision that answers the question, "How will the world have changed because of what we did?"
- ☐ This is an extremely important (and really fun) meeting, so turn off your phones and laptops and put them away.
- ☐ Today is about focusing on the big picture instead of small details. So let's get started.
- ☐ Other notes:

  _____
  _____
  _____
  _____
  _____
- ☐ Number off into small groups of two to three.
- ☐ Ask them, "What can you do with a concrete block?"
  - ☐ After five minutes, go around the room and ask them to share the creative ideas.

_____:_____ Map And Destination (50 Minutes)

- ☐ Take 10 minutes to break into small groups to create the marketing funnels and add in the second layer—messaging and stories. Give them all poster-size Post-It notes and markers.
- ☐ Then have each group present their findings to the group, with you taking notes. Stick the posters side-by-side on the wall.

- ☐ Sketch the ideal map on your whiteboard with every group's suggestions for everyone to see.
- ☐ Ask your team, "Where on this map is our biggest opportunity for 10x growth?"
  - –10% growth is where you can make slight improvementsto do what you're doing slightly better.
  - –10x growth involves risky moves you may have never done before but have the opportunity to double, triple, or even quadruple your results. These are big ideas that—if you did them well—would make the rest of your industry look like they aren't even trying.
- ☐ Give everyone a sticker and have them put it where they think the biggest opportunity is (this helps the quiet team members participate just as much as the loud ones).
- ☐ Circle your focus area as the one with the most stickers.



_____:_____ Break (10 Minutes)

_____:_____ Big, Hairy, Audacious Goal (BHAG) (40 Minutes)

- ☐ Give each group a poster-sized Post-It note and 15 minutes to fill in the blanks: In (Year), we will (focus) because (outcome).
- ☐ Collect the posters from each group.
- ☐ Post each vision on a wall, then you read them out loud to the entire team.
- ☐ Give everyone four stickers (or fewer depending on how many groups you have) to put next to their favorite parts in the visions.
- ☐ Then spend the remaining time reviewing each group's thoughts and crafting the one best vision for your marketing planning.

_____:_____ What Are Your Top Problems? (20 Minutes)

- ☐ Give everyone a stack of normal-size Post-It notes and ask these questions:
  - –What are our top problems as a marketing team?
  - –What are our threats?
  - –What are our weaknesses?
  - –What aren't we paying attention to that we should be?
  - –What changes are we seeing in our industry that we should be paying more attention to?
- ☐ Write the questions on the white board as they write their answers on the Post-It notes.
- ☐ After about 10 minutes, go around the room and have each person present their top problems one by one, then posting them on the wall.
- ☐ Give everyone four stickers and ask them to place their stickers next to what they believe are the biggest marketing problems.
- ☐ Move the notes with the most stickers to a part of the white board where you made your map.

Share this with your team:

–This white board now shows our biggest opportunities and challenges, which will be the areas we'll want to focus on when we brainstorm the projects that will help us reach our vision.

_____:_____ Lunch (90 Minutes)

_____:_____ Project Brainstorm (40 Minutes)

- ☐ Explain that you're looking for project ideas and not just content types, that you want to hear all of their ideas, and to think of projects that have opportunity for 10x growth instead of 10% improvement.
- ☐ Give them all a stack of Post-It notes and away they go.

_____:_____ Break (10 Minutes)

_____:_____ Project Prioritization (60 Minutes)

- ☐ Under your marketing funnel map, add labels for 10x and 10%.
- ☐ Gather all of the project idea Post-It notes from your team.
- ☐ Read each idea out loud, and ask for your team's input on where the project fits along the map (or in the top problems area) and whether that idea is a 10x or 10% idea. It's OK to use that as a scale instead of thinking of the labels as clearly defined rows. Stick each note where it fits best.
- ☐ Read the vision statement out loud to your team. Then review the 10x ideas that seem to mesh well with your vision, specifically the circled opportunity on your map or in the top problems.
- ☐ Hand out five stickers to everyone, and ask them to vote for the projects they think are the best opportunities for growth.
- ☐ Grab the Post-It notes with the most stickers on them, and prioritize them in a line from most stickers to least.
- ☐ Review those projects against your opportunity, vision, and top problems. Refine.

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