

Marketing Manager Scorecard

Company: Petra Coach
Position: Marketing Manager (grow and keep)
Location: Franklin, Tennessee (remote acceptable)
Compensation: Base plus executive level benefits
Online Listing: [To be posted](#)

WHAT WE DO

Petra Coach leads organizations through implementation of the Rockefeller Habits during a 12-36 month engagement. We facilitate the development of the One Page Strategic Plan, identify annual and quarterly priorities, create a systematic process to execute the priorities, and develop a culture of purpose, alignment and accountability - and have fun doing it! The Coach leads members through this process side by side with an Accountability Coach using a process refined by The Petra Team. At our core, we are a MINDSHIFT business.

MISSION OF THE ROLE

The mission of this role is to lead in creating, then manage and execute all aspects of marketing to *generate new leads* as well as extend the retention levels of existing engagements. As Petra Coach moves more deeply into the digital space the this role must have the capability to architect complex funnels from landing page design and development through omnichannel (multi-touch) sequences. The ability to measure and report on campaign and individual campaign stage performance is required. Additionally this role will be *part* of the *executive leadership team* and must be effective working both independently (swiss army knife) with the full view of the team and business in mind. *Responsible for adhering to a fully combined cost per lead commitment while keeping the desired business outcomes as a guide.

Key Criteria/Requirements

- Has worked with at least two companies with HUBSPOT transition/management experience.
- 5+ years' experience with content marketing and a track record of increasing success.
- Experience desired in as many of the following areas as possible:
 - REACH (strategy, social media, SEO, PPC, PR and Awards)
 - ENGAGEMENT (website improvement, blog, newsletter, emails, video content, white papers and case studies, book sand e-books)
 - CONVERGE (lead generation, automation, workflows, reporting and analytics)
- Has experience working independently (swiss army knife).
- Has experience marketing to the B2B C-Suite and/or high level decision makers.
- Demonstrated ability to effectively present to both individuals and teams.
- Demonstrated ability to market *change* to people who don't necessarily know they need it.

		MAR	Rating	Comments
CORE VALUES				
There is no TRY – Only Do!	We don't make excuses – we make progress. We look at each challenge as a new level of growth that only makes each of us better. Nothing is left undone here, we finish what we start, and we do what we say – we don't try. We also believe that language is important, and you won't catch us using the word TRY in any context.		5	
I've got your back – No matter what!	No one is in it for himself or herself. We sacrifice for one another to achieve more than we can alone and we never seek reward for any of it. All of us will at one time or another will find ourselves in a spot that we truly need another team member and by living this value we always 'know' that a team member will be there.		5	
Please and Thank You – Say it and Mean it!	We recognize the power of appreciation and being nice. We say 'please' when asking and say 'Thank You' when it's deserved – which is often. We use handwritten notes and the spoken word to express these basic levels of respect. We 'seek out' moments that team members perform in a way that we can recognize them and we act on them.		4	
Everything is an Experience – every time!	We make each interaction an experience. We ask ourselves – How can we add an extra 15% on top of what we have already done that would make someone say 'wow, that was an experience' – 'that was more than I expected' – 'I want to do this again' and then tell others about it. With one another, with our members, with our vendors and even with the mail carrier. Everything is an experience to be remembered and remarked about.		5	
See around the Curves – anticipate needs and 'pre' fill them!	A big part of work involves us seeing what is coming before it arrives. In planning sessions with teams, in traveling via planes, trains and automobiles and as importantly with one another. Far before the moment arrives we think through what is coming and work to be prepared at a level most would consider overboard. By doing this we are uber prepared and gain the ability to respond with more agility than everyone else. We pay ultra-attention to what is being said and what is not being said in every interaction to 'see' what is coming next.		5	
Be Curious – ask WHY and Improve!	We never feel like we know everything and have arrived. We never accept things as they are. We seek constant improvement in ourselves, in those around us, in our process, in everything. We ask 'Why does it need to be done this way' and seek ways to improve. We never stop as we know when we do – it's over.		4	

KEY TECHNICAL COMPETENCIES

1	HubSpot CRM – Marketing & Sales Hub – Pipeline and Funnel systems		
2	HTML coding, social targeting tactics, digital media buying		
3	Outlook – General Communication Management		
4	Dropbox – Universal Storage and Selection of Materials		
5	Microsoft Office 365 - Word, Power Point, Excel, PDF (Adobe), Photoshop		
6	Video Communication Competencies		

Measurable Accountabilities

	Metric	Interviewer Rating (A, B, C)	Comments
Quality Lead Generation	Double the number of SQLs (Opportunities) from the current 50 per quarter to 100 per quarter with a focus to increase this quarter over quarter		
Marketing Strategy	Develop with existing team an overarching marketing strategy inclusive of new systems (digital) and existing (traditional) methodologies		
Retention Focus	Year 1: > 18 months Year 2: > 24 months Year 3: > 30 months		
Marketing Metrics/Dashboard	Create marketing metrics – including ROI and COA, create a marketing funnel (aligned with the sales funnel), and manage the activities and tracking via dashboards to enable the telling of a story to leadership		
Petra 5.0 Transition/Evolution	Lead (with partners) the full transition and evolution based on the active 5.0 plan for marketing while keeping it aligned to the overall needs of the business. On time delivery and at/under budget (reporting to leadership under a cost structure)		
Reporting	Real time CRM data updates with team reporting (weekly huddle)		

Key Competencies	Minimum of rating of 8.5 on resourcefulness, excellence, likeability, listening, communications, and resiliency.		
Marketing Activities	Develop a comprehensive marketing plan with a longer term horizon including all activities, investments and results (aligned to the current programming and 5.0 new programming) with rolling 90 day promotional and editorial content		
Vendor/Relationship Management	Effectively work with vendors as a PM, on time delivery and at/under budget (reporting to leadership under a cost structure)		

Rating Scale: A – Can predictably meet or exceed expectations B – Will predictably fall somewhat short of expectations
C – Will predictably fall far short of expectations

Key Competencies

- Resourcefulness
 - Results-Oriented
 - Excellence
 - Independence/
Entrepreneurial
- Written Communications
 - Likeability
 - Listening
 - Enthusiasm/Passion
 - Energy/Drive
- Conceptual Ability
 - Ambition
 - Tenacity
 - Creativity

Full List of Competencies

Rating Scale: 5 = Excellent 4 = Very Good 3 = Good 2 = Only Fair 1 = Poor					MAR – Minimum Acceptable Rating				
Ease of Changing Competency: Difficult Hard, But Doable Easy									
Competency	Definition	MAR	Your Rating	Comments					
INTELLECTUAL									
Intelligence	Ability to acquire understanding & absorb information rapidly. A quick study. A clear and agile thinker; quick on their feet. Handles objections quickly and effectively.	5							
Analysis Skills	Identifies significant problems & opportunities. Analyzes problems and people in depth. Sorts the	5							

	wheat from the chaff, determining root cause.			
Judgment/Decision Making	Consistent logic, rationality & objectivity in decision making. Neither indecisive nor hip-shooter.	5		
Conceptual Ability	Deals effectively with not just concrete, tangible issues but with abstract, conceptual matters	5		
Creativity	Generates new approaches to problems or innovations to established best practices. Shows imagination	5		
Strategic Skills	Determines opportunities & threats through comprehensive analysis of current & future trends. Comprehends the big picture.	4		
Forward-thinking	Preempts problems. Anticipates future issues and works to contain them before they become problems.	4		
Risk Taking	Takes calculated risks, with generally favorable outcomes. Does not "bet the farm."	3		
Education	Has had formal training with regard to marketing and continually seeks new thought processes and ideas. Never stops learning.	4		
PERSONAL				
Integrity	Iron clad. Does not ethically cut corners. Earns trust of co-workers. Puts organization above self-interests.	5		
Resourcefulness/ Initiative	Passionately finds ways over, around, or through barriers to success. Achieves results despite lack of resources. Goes beyond the call of duty. Shows bias for action. A results-oriented "doer."	5		
Organization/Planning	Plans, organizes, & schedules in efficient, organized manner. Focuses on key priorities	4		
Excellence	Sets high stretch standards of performance for self and others. Low tolerance for mediocrity. High sense of responsibility.	5		
Independence/ Entrepreneurial	Willingness to take an independent stand. Not swayed by last person talked with. Can deliver results with limited management oversight.	5		
Stress Management	Stable & poised under pressure.	4		
Self-Awareness/ Feedback	Recognizes own strengths & weaknesses. Not defensive. Does not rationalize mistakes or blame others. Uses feedback mechanisms.	4		
Adaptability	Not rigid. Copes effectively with complexity and change.	5		
INTERPERSONAL				
First Impression	Professional in demeanor. Creates favorable first impression – body, language, eye contact, posture, etc.	3		
Likability	Puts people at ease. Shows Emotional Intelligence. Warm, sensitive, compassionate. Not arrogant. Friendly, sense of humor, genuine.	4		
Listening	Tunes in accurately to opinions, feelings, and needs of people. Empathetic. Patient. Let's others speak. Listens actively.	5		
Customer Focus	Monitors client satisfaction (internal or external). Establishes partner relationship with clients. Visible & accessible to clients.	4		
Team Player	Reaches out to peers. Overcomes we-they. Approachable. Does what is best for company.	4		
Assertiveness	Takes forceful stand on issues without being	4		

	excessively abrasive.			
Communications – Oral	Communicates well one on one, in small groups and public speaking. Fluent, quick on feet, command of language. Keeps people informed.	4		
Communications – Written	Writes clear, precise, well-organized documents using appropriate vocabulary, grammar & word usage.	5		
Political Savvy	Aware of political factors and hidden agendas, and acts effectively with that awareness. Can effectively influence all parties in a complex situation.	3		
Negotiation	Achieves favorable outcomes in win/win negotiations.	5		
Persuasion	Persuasive in change efforts, selling a vision. Convincing.	5		
MOTIVATIONAL				
Energy/Drive	Exhibits energy, strong desire to achieve, high dedication level.	5		
Enthusiasm/Passion	Exhibits dynamism, excitement, and a positive can do attitude. Passionate about making clients' lives easier, saving them money, and helping Petra Coach reach its goals.	5		
Ambition	Desires to grow in responsibility & authority.	5		
Compatibility of Needs	Willing and able to do relationship building activities with prospects and sales people outside of normal business hours (breakfasts, dinners, weekends).	3		
Balance in Life	Achieves sufficient balance among work, wellness, relationships, community involvement, professional associations, friendships, hobbies & interests.	4		
Tenacity	Consistent reward of passionately striving to achieve results. Conveys strong need to win. Reputation for not giving up.	5		

LEADERSHIP				
Vision	Provides clear, credible vision and strategy.	5		
Change Leadership	Actively intervenes to create & energize positive change. Leads by example.	4		
Inspiring Followership	Inspires people to follow lead. Minimizes intimidation. Takes charge. Motivates by pushing appropriate hot buttons of individuals.	3		
Conflict Management	Understands natural forces of conflict and acts to prevent or soften them. Effectively works through conflicts to optimize outcome. Does not suppress, ignore or deny conflicts.	3		
MANAGEMENT				
Selecting A Players	Topgrades through effective recruiting & selecting at least 90% A players.	4		
Training/Development/Coaching	Actively & successfully trains people. Coaches & develops for promotion into positions where they succeed. People builder.	4		
Goal Setting	Sets fair stretch goals for self & others. Encourages individual initiative.	5		
Empowerment	Pushes decision making down to lowest level. Provides authority & resources to subordinates.	4		
Performance Management	Fosters high level of accountability through fair, hard hitting performance management system. Free with deserved praise & recognition. Constructive in criticism.	4		

	Provides frequent feedback.			
Redeploying B/C Players	Redeploys chronic B/C's.	4		
Team Builder	Achieves cohesive, effective team spirit with staff. Treats staff fairly. Shares credit.	4		
Diversity	Topgrades with diversity.	3		
Running Meetings	Demonstrates ability to organize & run effective meetings.	4		