

The Marketer's Toolbox Series

# THE NEW HEAD OF MARKETING'S FIRST 100-DAY PLAN: B2B SAAS EDITION

*A 100-DAY PLAN FOR NEW HEADS OF MARKETING THAT ENSURES THEY WILL HIT THE GROUND RUNNING AND ESTABLISHES A ROADMAP TO SUCCESS.*

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# WHEN YOU'RE BROUGHT IN AS THE NEW HEAD OF MARKETING AT A SAAS COMPANY THAT'S OWNED BY AN ENTREPRENEUR OR PRIVATE EQUITY, YOU'RE IMMEDIATELY THRUST INTO THE SPOTLIGHT.

**They probably didn't hire you because all is well in marketing. They have an issue or two in mind that made the prior person or organization unacceptable.**

It's almost a given that you'll need to come up with a plan to solve these problems and demonstrate progress quickly. But how do you actually do this?

Having seen our share of new marketing leaders come in, and having witnessed spectacular successes and misfires, we've built a basic template with some guidance that should help you set expectations with leadership, get your arms around the organization's current state, gain agreement on the issues to be addressed by marketing and build a plan to drive to the goals you have established as being the most important.

Here's the basic architecture for a 100-day plan for the new head of marketing at a SaaS software company (actually 114 days, including the two weeks before you start work). Take this as a good starting point and make this fit your situation and experience. The recommended plan here assumes there is no crisis as you arrive and that "business as usual" can go on without 100 percent of your time being dedicated to it. (You will have to get stuff done to keep marketing commitments, and that in and of itself is important to establish as you join a team).

# 14 DAYS BEFORE YOU START WORK

*The mission here is to set yourself up to hit the ground running.*

- Sign NDA and any employment agreement.
- Provide leadership with your 114-day plan outline so they will know what your process will be, and seek agreement with it in principle (begin the important psychological process of gaining agreement / generating consensus in small steps).
- Request all plans that are run by, involve or impact marketing.
- Request organization chart and job descriptions for sales, marketing and customer success and any agreements in place between these peer organizations and marketing.
- Request competitive information used by sales (e.g., battle cards, assessments).
- Read the entire website, top to bottom. Test conversion paths and note any friction points. Test mobile experience.
- Get a demo from a high-performing member of the sales team to begin learning the sales process and product, and start building your network within the firm.
- Take notes on things that appear to be working well and those that are not. First impressions matter. Trust your gut.

# DAYS 1-30 AS THE NEW HEAD OF MARKETING

*The mission here is to gather more information, learn a little about the political landscape and set the stage for your future success. You'll be making important impressions on your teammates about how you conduct yourself and do business.*

- Meet with your boss (likely the CEO) and ensure you have the mission understood; this almost should be like an interview ... you're on a fact-finding mission ... what are the top problems? What is his/her goal for the coming year? Three years? What is the vision for marketing from his/her vantage point? (Make it clear you're aligned with CEO and CFO goals and will build your plans to support them.)
- Gain access to the management KPI dashboard/report; it's important to know what the team measures and how this figures into their vision of success.
- Review content marketing, advertising and email marketing plans in place and results that have been achieved; meet with outside agency execs, if any, to establish a relationship and begin subjective evaluation.
- Familiarize yourself with the new technology platforms and tools your company uses.
- Get sign-ons to the product(s) you sell and become competent at using them over the next 2-3 weeks. Start taking notes on any product management ideas you may have.

## DAYS 1-30 AS THE NEW HEAD OF MARKETING

- Interview peer execs (sales, marketing, success, finance) with a script that focuses on mission as gleaned from your meetings with the CEO.
- Interview top clients and partners (if there is a channel). Ask them tough questions about the company and its products and services.
- Review customer success surveys for current and churned customers, if they exist, or write and field first surveys.
- Get current marketing calendar and reporting.
- Note any gaps or outliers in fact-finding. (e.g., determine whether KPIs/ benchmarks are standard or proprietary, whether churn is high, whether there is marketing automation in place, etc.).
- Write up a summary of findings as a PPT and review with your CEO and then with leadership peers after any suggested changes.
  - The mission here is to get a second agreement in which you, your boss and the team all see the same things, agree on specific objectives to be accomplished and align on what should be addressed first, second, etc.
  - If you already have established a simpatico relationship with someone on the team, share some of your insights and seek confirmation/explanation.
- Figure out a low-hanging fruit opportunity and get it accomplished ASAP. This might be a priority that was not accomplished by the prior regime or a CEO pet project that you also believe in. Aim for something that will drive revenue or meet a shared objective that everyone is being measured on. This project will give you insight into what your new organization can do, and who's who politically.

# DAYS 31-60 AS A NEW HEAD OF MARKETING

*Now that you're a month into your new role, it's time to build your plan and budget for what you'll need to succeed.*

- Review marketing, sales and success automation and determine whether it fits the needs of the business, as you understand it.
  - Build a requirements document (high level) for automation and socialize with peers and CFO.
  - Meet with leading automation vendors to determine fit and learn from them, research via internet (e.g., G2Crowd, analyst reports, associations, etc.).
  - Select marketing, sales and success automation vendor(s).
    - This may be plug-replacement of old systems or augmenting existing systems to achieve goals for reporting or other capabilities.
- Gather as much competitor intelligence as possible; what are they saying, doing and spending money on? Build a marketing SWOT analysis for the competitor set.
- Sit in on sales and customer success calls and dig deep with reps and managers here to gain a real understanding of their worlds and how marketing can and should help.

## DAYS 31-60 AS A NEW HEAD OF MARKETING

- If persona research is old or non-existent, get personas done for the top economic buyers and influencers (2-5 in each segment).
- Share results to date with agency and, if they are likely to remain in place, ask them to provide campaign and program recommendations (if they've proven themselves worthy, keep them on; if not, this is a good time to start your search for a new agency and put the current agency on notice as may be required).
- Review budgets and outcomes for all major marketing spend with an eye for what you can change to drive more results as sought by CEO and his/her KPIs; determine where spending needs to increase (categorically) and start building out campaign plans and associated budgets and KPIs.
- Whiteboard with your team and colleagues until you think you have a workable plan with BHAGs as well as achievable objectives. You might want to consider a weighting system (organizational impact, budget needed and revenue potential are three useful weighting factors) for the year's priorities if your great ideas exceed your ability to budget and deliver on plans. (We've seen this work to great effect in gaining consensus around a plan.)

## DAYS 31-60 AS A NEW HEAD OF MARKETING

- Evaluate your personnel needs and who's on the team today; create a new organization chart based on what you think you'll get approval to do. By now, you should know who on your team is a keeper and who would be better off moving on, and you can create new roles and responsibilities, as well as training plans, accordingly.
- Make PPTs of your findings as discussion documents for a meeting with your CEO and leadership peers; get their feedback and then huddle with CEO to align once more.
- Deliver and report on success of “low-hanging fruit” project and share the glory with those who made it possible (team-building opportunity).



# DAYS 61-90 ASSERTING LEADERSHIP AS HEAD OF MARKETING

*Now it's time to build a formalized version of your plan, present it and iterate.*

Read all the information you can about your industry, company and competitors and take some time to reflect on what it means. What are the big themes? What do buyers want? What do we have to sell? Do we have any unique insights into our market? Can we be thought leaders? You need some unifying themes to make your plans make sense.

- Build a one-year plan that is calendar- and theme-driven. Some markets respond well to quarterly campaigns. Others are big-picture, especially if you've decided to take a thought leadership approach, as this won't happen in just a few months.
- Use a template to help organize your presentation (or use what worked in previous jobs for you or your leadership).
- Socialize your plans with sales and customer success, as they'll have a stake in your success. Make sure your plan considers their needs as uncovered earlier to build your social credibility and political capital. (You'll want to start off helping them through your new plans and budgets.)
- Make sure to ask for a reasonable budget, based on the agreed objectives; if budget is not forthcoming, dial back expectations as to what can be achieved.
- Present your final plan to the CEO and subsequently to the peer group.

# DAYS 91-100 IMPLEMENTING YOUR FIRST YEAR'S MARKETING PLAN

*Get busy! Here's where the rubber meets the road. You've sold your plan, gotten agreement on budget and priorities and have also closed on a quick-win project (and shared the glory).*

The best advice is to not rest on your laurels. Put your plans into motion. Make decisions efficiently. Hire and fire as needed for the business (and please fire with compassion). Buy new automation and get it in place with the help of certified advisors. And make sure to measure and report on your success.

If you are using contemporary marketing and sales automation, a lot of the reporting is baked into the software. Make sure you know how to use it, or get someone who does, to help you track what's working and what is not, quickly iterate, and report it all to your leadership.

Oh, and have fun! Leading a marketing team can be one of the most rewarding jobs in any organization.

Want to talk about your new gig? Marketing leaders at SaaS firms (new to the job or not) should feel free to [book a meeting with me](#) to discuss any issue that's vexing them.

**FOR MORE INFORMATION,  
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