NATIONAL DISABILITY SERVICES

MARKETING GOVERNANCE

MODULE 6

ROLES AND RESPONSIBILITIES

PRESENTED BY ALEX MAKIN

PRINCIPAL FOUNDER OF SYNEKA MARKETING

# Slide 1 – Introduction

Hello. You are participating in the roles and responsibilities module of the marketing governance series. This is the fourth component of the five modules on marketing governance. So far we've explored strategic alignment, consideration of risk, financial accountability, and now we're exploring roles and responsibilities.

* Who is it that needs to be responsible for your marketing activities?
* What governance frameworks do you need in place to ensure transparency and accountable outcomes?
* How do you ensure that those activities are undertaken in a manner that delivers value to your organisation?

My name is Alex Maken, and I'm guiding you through this webinar series. The series is being produced in conjunction with National Disability Services, in strengthening the capabilities and capacity of organisations that need to become market-facing due to the introduction of the NDIS, the National Disability Insurance Scheme.

Accompanying this webinar is a series of two modules that explore core marketing concepts, and those modules are designed to introduce core concepts that help provide the context for this marketing governance series. If you need to refresh your marketing knowledge, it is well worth exploring those two modules as well.

Thank you for your ongoing participation, and we look forward to sharing the marketing governance aspects of roles and responsibilities.

# Slide 2 – Learning Objectives

There are three key learning outcomes that we're going to be exploring today. The first is identifying the role and scope of marketing.

* How does marketing sit within your organisation?
* Who should be responsible for the various aspects of marketing?
* How do you then determine suitable personnel and skills?
* How do you identify what are the core skills that you need to undertake marketing activities?

And we're going to be exploring how to optimise marketing within your organisation.

* How do you optimise the way that marketing is positioned in your organisation, the structure of marketing teams?
* How do you align that vertically as well as horizontally across your organisation?

As we've explored through this series, and as we've discussed, marketing is about the alignment of that marketing mix.

* How do you embed a consistent experience for your participants and for your stakeholders?

You need to be able to optimise roles and capabilities so that you're able to deliver that consistent experience, and that's ultimately what you're trying to create. It's who needs to be responsible, what activities do they need to undertake to create, maintain and sustain that experience? And that experience will differ depending on who it is that you're targeting, market pressures, the services and products that you provide, but it's about providing consistency around that experience, and consistency as evidenced through your application of the marketing mix.

They're the three key learning objectives that we'll be exploring today. As per the other modules, there is a workbook that accompanies this webinar, and as we go through there'll be opportunities to undertake the activities within the workbook, with the aim of applying this within your existing organisational context.

# Slide 3 – Defining Roles and Responsibilities

When we look at roles and responsibilities and effectively who is going to be discharging those marketing activities, we need to consider where marketing sits within our organisation. Often marketing is both a vertical and horizontal function. Your marketing department is your vertical element. It's the centralised resource that's responsible for the coordination of marketing activities. But there'll often be personnel across your organisation horizontally who will be responsible for specific aspects of marketing. Common examples in not-for-profits include the development of partnerships, includes the interactions that your service delivery team may have with other organisations and other partners. There'll be a number of roles that interface across marketing, and even if they're not defined as a team member of your marketing department they still have responsibilities that enable marketing and are required for marketing to fulfil the outcomes that you wish to create. So you need to be able to identify the marketing-related activities across your organisation, because what you need to provide is consistency. Cohesiveness and consistency across that vertical marketing function and how it applies to your organisation as well.

If you don't have a marketing team, if you don't have a specific marketing role in your organisation, then those responsibilities are going to be even more fragmented, so you need to be able to identify which staff members, which members of your team, are responsible for marketing-related outcomes. If marketing isn't their primary responsibility, what proportion of their role has a marketing aspect to it? What you'll find is that most people across your organisation will have some bearing on your marketing direction. Your service delivery team reinforce the experience and use of your products and services. Partnerships, fostering those partnerships, identifying the stakeholders, teams that are responsible for admission and identifying and assessing client needs, or participant needs, are all part of that marketing dynamic.

We need to explore how marketing fits in your organisation beyond advertising your promotions and communications and into how you embed a marketing-facing culture. That's ultimately what we're trying to achieve. It's:

* How do we embed a culture that faces the market?
* How do we build the capabilities and capacity of our team, whether they're in marketing or whether they're associated with marketing, to reinforce our position in the market and to meet the needs of the stakeholders and the participants who are part of the market segments and target markets that we wish to acquire and retain?

We need to align roles and responsibilities with those marketing outcomes and embed the marketing metrics that we will be developing into those roles and responsibilities, so that you can define performance against that defined marketing criteria.

And of course, we need defined reporting structures, and we need assessment around capabilities and capacity.

* Who is responsible for what in your organisation?
* What levels of delegation are appropriate?
* What are the reporting lines and structures, particularly important if marketing needs to work vertically and horizontally?
* How do your other team members interact and engage marketing so that marketing is able to make informed decisions, and that marketing is able to embed that market-facing culture that will be required through the introduction of the NDIS?

# Slide 4 – The Marketing Mix

One of the core marketing concepts we explored was the marketing mix, and those seven aspects that we need to consider as we engage, maintain and sustain a market presence.

* How do we align the people that deliver our services or are involved in service delivery or product delivery?
* How do we align that with our pricing points?
* How do we distribute our products and services?
* What are our channels to market, the place that we use to distribute those?
* What evidence, how do we demonstrate the tangibility of the outcomes that we create, fundamentally important to the NDIS, where it's an outcomes-based model?
* What processes do we use to maintain that customer experience, or that participant experience?
* What processes are embedded to create seamless activities, and a seamless experience with our organisation across the decision-making process?
* How do we promote?
* How do we communicate?
* How do we engage our target markets?
* What are the products and services that we offer?
* How do we ensure that those products and services meet the needs of the market and we can demonstrate value provided through those products and services?
* How are roles allocated across those aspects of the marketing mix?
* Who is involved in each of those elements within the mix?
* What visibility does marketing, if you have a centralised marketing function, have throughout each of these components?
* How can your marketing team influence discussions around processes that are used, and the capturing of data and the use of that data to drive market insights and to identify opportunities to strengthen participant acquisition?
* How does marketing inform the development of new products or services, or the identification of new markets that you may wish to enter?
* How does marketing support the people involved in service delivery to reinforce key messages that need to be communicated, and to reinforce the value that you provide through that outcomes-based model?
* How does marketing embed the evidence and the outcomes and the values that you create?
* How does marketing lead a conversation around pricing points and complementary services that may support the products and services that you offer through the NDIS?
* How does marketing assist in communicating and promoting those products and services, the channels that you use to raise awareness with your participants and target stakeholders and through that decision-making process?

This is about understanding how marketing fits within that context of each element of the marketing mix.

* If you have the centralised marketing function, how do you make sure that they have visibility within those components?
* Who ultimately is responsible for managing that stakeholder participant experience?
* What influence and what ability do they have to modify components across the marketing mix?

Because if your marketing managers don't have the ability to influence those elements of the marketing mix it's going to lead to diminished outcomes. The role of marketing is to maintain consistency across each of those elements, and to ensure that that consistency and your internal capabilities and capacity reflects and demonstrates your value to the external marketplace.

# Slide 5 – The Marketing Function

Exploring our workbooks, we can ask the question:

* Do you have a defined marketing team?
* What are the responsibilities of that marketing team?
* What's the layout of the marketing function in your organisation?
* Where does marketing sit within your organisation?
* Who's part of that?
* What other marketing roles exist that may not necessarily be seen as part of the marketing team?
* Who do these roles report to, and what metrics do they report on?
* How many people do you have within those marketing roles?

We need to be able to explore each of those elements and that layout of the marketing function. What you're exploring is how marketing currently sits within your organisation, because we will then delve into:

* How do we define those marketing functions?
* What are the roles?
* What are the responsibilities and expected capabilities that we need to deliver those various activities?

We need to ensure that we have a clear understanding of how marketing is within our organisation and its context, and its scope and ability to influence discussions and outcomes and recommendations through the marketing mix.

# Slide 6 – Clear Accountabilities

Good governance is fundamentally about having the right information to make an informed decision. To deliver good governance, you need clear accountabilities, and you need alignment with your strategic direction. So when we look at marketing-related roles, we need to explore the various accountabilities that are required, and ultimately we need to assess the core direction and core outcomes we're seeking.

There's effectively three layers. There's a strategic layer, the leadership and direction of marketing within your organisation. That could sit with your CEO. It could sit with a Marketing Manager or a Chief Marketing Officer. It could sit with your Board.

* Who is it that drives that leadership and direction from a marketing perspective?
* Who is it that ensures alignment between that marketing direction and your organisation?
* Who is it that assesses risk, that assesses strategic alignment, that considers the outcomes required and the resources needed, that ensures and defines metrics and their alignment with your strategic direction?

That is our top layer. It's around strategy and alignment between marketing and your organisation.

The second layer is about management. It's the oversight and accountability around those various aspects of the marketing mix.

* Who's responsible?
* What core requirements do they have that they need to report on?
* How do they oversee the delivery and execution of marketing tactics?

That management layer is responsible for ensuring the delivery of the KPIs, the performance indicators, that have been set from a strategic direction.

And we have the execution of marketing activities. This may be internal or external, but this is the day-to-day delivery of the marketing activities that you've identified within your strategic marketing plan, and where those activities are being delivered and assessed on the metrics and performance indicators that have been defined. This is about embedding good governance principles that are found in other support functions within organisations, around the delivery of information technology, around the delivery of HR and other support functions. This is about providing the rigour that's required and the separation of roles so that you can make informed marketing decisions based on the ability to get information that enables you to then make those relevant decisions. This is about drawing marketing back to good governance and being able to articulate and align your marketing direction with your organisational vision.

We have those three key layers that need separation. Unfortunately it's far too common to see a blurring between those three layers. As a result there's conflicting requirements, conflicting responsibilities, conflicting metrics. If you're executing marketing activities and then planning those activities, are you actually planning it based on the needs of your market, or are you executing it based on tools that you may be familiar with, or tools that you've heard about, rather than actually applying the rigour around is this the right approach based on our organisation, who our stakeholders are, where it is that they congregate and the sources of information that they access and where they receive relevant information and seek information about our organisation, versus defining what those metrics are and then assessing the various marketing channels and various marketing tools to achieve those outcomes.

The blurring of those three layers results in blurred responsibilities and hard to identify metrics. The separation of those three functions reinforces core accountability, and reinforces that ability to make those informed decisions, and that's why it's critical that you separate each of those three components. You may have external parties that are delivering part of your execution.

* Is there a separation between strategy and execution?

If you go to a social media agency, the answer is going to be from their perspective, and the strategy is going to be social media. If you go to a design team, the answer's going to be around branding and design, and that's what the strategy they are going to provide is going to indicate. That may not necessarily be the strategy required for your organisation to achieve your strategic direction. And ultimately through the NDIS model it's around exploring how do we strengthen acquisition and retention? The separation of those three layers enables you to build the capabilities and capacity to align your marketing outcomes with your organisational vision.

# Slide 7 – Role: Strategy

We’ll be exploring three layers in further detail, because often in a lot of not-for-profit organisations those three layers are blurred and personnel may be responsible for a number of aspects across each of those layers.

So the first is strategy. This is the layer that ultimately sits with your Board and your Executive team, and this is designed to reinforce good governance. It's your Board and Executive team that should be ensuring that marketing aligns with your strategic direction, and that they're able to coalesce marketing across your organisation. They should have the ability to ensure that there's a market-facing approach, that you're able to maintain consistency across that stakeholder experience. Depending on the size of your organisation, this may sit with a Marketing Director or a Chief Marketing Officer, or it may be a responsibility that sits with the Executive Officer directly and the Board. It's about defining where that responsibility sits, and how they are able to embed the rigour and the metrics and the accountability around marketing outcomes, and they are able to ensure that strategic alignment between marketing outcomes and the vision and direction of your organisation.

The strategy layer is about setting the tone, fulfilling that sense of direction, and embedding that consistency and developing the leadership and capabilities to ensure that your organisation is aligned, that there's alignment between marketing and organisational direction. Because where there's a mismatch, we create risk, and if there isn't strategic alignment we're creating unnecessary and quite high levels of risk around expectations not matching whaat is being delivered, where we may be promoting a product or service that isn't necessarily a representation of the value it provides. Or we may be missing market opportunities and missing opportunities to embed and build on our market presence. The strategy layer sets the tone and direction, and it needs to be able to carry that across the organisation and ensure that all those various aspects of your organisation coalesce and maintain consistency across the marketing mix.

Typically the roles within this strategy component will be a Marketing Director or Chief Marketing Officer, but depending on the size of your organisation this could be embedded into the performance indicators for your Chief Executive Officer, your Executive Officer, your General Manager. In terms of the general marketplace, the average Marketing Director, Chief Marketing Officer will have about 10 to 20 years experience, and typically it'll be more towards the 20 year end of that spectrum. This is a strategic and senior management role. This is a role that's responsible for setting direction, not executing. Some of the key skills that they need to bring into that role is an understanding around advertising, around marketing management, so the management of marketing as a function, and how they can operationalise and work through the organisation to operationalise what has been embedded within your marketing plans. That strategic marketing function in being able to ensure that adequate research is undertaken, that there's a clear sense of strategic marketing direction, and then the corresponding implementation schedules to execute and deliver on that direction.

There's skills required around marketing communications.

* What are the channels to market?
* What are the communication platforms, the tools that you can use to shape those experiences and perceptions across the decision-making process?

A background in market research and understanding of the role of market research, and ensuring that good research is undertaken. This isn't just about asking surveys. It's about actually asking the right questions so you can get insights out of those answers. It's about ensuring that you're then able to act on that feedback and demonstrate that there's been modifications as a result. We often talk about survey fatigue, and inevitably one of the causes of that is the fact that people have been asked their opinion, they've filled out surveys, and haven't necessarily seen the outcomes as a result. So it's about being able to identify required market research, what insights are required and what research is needed to lead to those insights, and then demonstrating, particularly if you're utilising your stakeholders to gather that research and to gain some insights, demonstrating the outcomes and the results of that feedback.

Typically there needs to be an awareness around business development.

* How does marketing help in terms of developing and building acquisition and retention pipelines based on your participants?

And broader managerial experience around people management.

* Can your Chief Marketing Officer, your Marketing Director, can they manage the team around them?
* Can they ensure that the team has clear expectations on what it is that they're required to undertake and how they're being assessed on those deliverables?
* Are they aware of operations and how operations, and the operations of your organisation, needs to be interfaced with marketing?
* Is there an awareness of financial management, and the ability to develop marketing budgets, to plan those marketing budgets, to execute those marketing budgets, and to review on the outcomes achieved through that allocation of resources?

This is a strategy layer that typically should sit with someone with up to or around those 20 years of experience so they're able to provide that leadership and direction, and introduce that skill-set that they have.

# Slide 8 – Role: Management

The second layer is management, and typically this will be the role of a Marketing Manager. When you explore a Marketing Manager and unpack it, they actually need to have managerial responsibilities. You know, we often see Marketing Managers that don't have the ability to influence budget, don't have a team reporting to them, so the question is:

* What is it that they're actually managing?

And they don't have the ability to influence the marketing mix. If they're not able to manage those elements of the marketing mix, you need to consider whether they are a Marketing Manager.

Typically a Marketing Manager will have around about five to 10 years experience. Once again it tends to be a role that tends to trend towards the latter part of the spectrum, so towards that seven to 10 range. They will effectively have the management of direct marketing reports. So that Marketing Manager will have responsibility around the delivery around marketing tactics.

* Who is it that's undertaking your social media campaigns?
* Who is it that's writing content for your organisation?
* Who is it that's maintaining relationships with media, with other stakeholders?

They'll be responsible for those reports, and being responsible to align those activities with the outcomes that are desired, and be able to demonstrate in turn to that strategy layer that these activities are building and helping to fulfil that vision that has been articulated at a strategic level. A Markdffing Manager should be overseeing execution and managing the sequence of activities.

They should not be executing the activities themselves. If they are involved in execution, it once again diminishes their ability to properly manage it and to properly provide the oversight and understanding of the metrics that are required. Your Marketing Manager should be able to manage the sequence of activities. If you're embarking on a campaign, what sequence is required, and what are the journeys required for a stakeholder to go from the pre-purchase phase around initial awareness and starting to identify the needs that you fulfil,

into purchase or into engagement, into then managing that relationship post their direct involvement in your organisation? The Marketing Manager is responsible for those activities, and basically responsible for overseeing those touchpoints and the interaction that is required across each of those touchpoints, building on that execution and adding that layer of insight, and being able to measure those results, not just in terms of each activity that's been executed but the aggregative of those activities.

* What impact combined does a radio campaign have with a newspaper campaign with a social media piece and content with then an event?

Being able to aggregate each of those elements across, as an example, the marketing mix and the decision-making processes that are required to shift your participants and those stakeholders through that layer of decision-making, and through that journey that they follow. That is the key responsibility of a Marketing Manager. They're managing the marketing function. They're not executing it directly.

So typically your Marketing Manager will have five to 10 years experience, and they bring with that an operational skill-set that enables you to utilise their background in marketing execution, marketing operations, and to start overseeing and managing that marketing function. So typically some of the key skills that you'll be looking at for a Marketing Manager is project management.

* Can they manage multiple teams?

And some of those teams, when you look at execution, could be external.

* Can they manage multiple teams and multiple people within those teams?
* Can they manage that interface between marketing and other aspects of the organisation?
* Do they have the ability to apply strategic marketing, and to think strategically about marketing decisions?

So beyond, let's execute a tactic, into:

* Will this tactic strengthen our presence in the market, our awareness?
* Where does it fit in terms of our stakeholder journey, the decisions that sit behind it?

And then:

* Is that tactic appropriate at that place in the journey?

Other key skills include marketing communications.

* What experience do they have in terms of communications and the promotional element of the marketing mix?

And advertising:

* Are they aware of advertising platforms?
* Are they aware of identifying the suitable platforms based on the needs of your target market, based on what that target market refers to, and based on the products and services that you provide?

# Slide 9 – Role: Execution

Then we have marketing execution. This is the layer that is executing your marketing activities, and this layer should be reporting on the metrics that you have defined. This is critical particularly if you look at external partnerships that deliver your marketing activities. You need to make sure that you are clear on the metrics.

* How are they being assessed, and how those metrics fit in to your broader stakeholder journeys and the experiences around it?

Because execution provides the inputs that are required to achieve those outputs, and in turn your Marketing Manager and that management layer can measure those outputs and start determining the outcomes that are created. You need to be able to measure marketing execution against the performance indicators that you set, and those performance indicators are set within your marketing plan. It's about ensuring that execution is following that direction, not defining its own metrics, and then not embedding itself in terms of the delivery of what is required.

One of the core challenges, particularly in maintaining external marketing teams, so if you have agencies or others delivering marketing activities, is ensuring that what they're doing is aligned with your direction, and that it actually delivers value to your organisation. As we've explored, the core definition of marketing is the mutual exchange of value.

* How does that execution component reinforce the value that you provide, and in turn generate a greater return and surplus than the resources that have been allocated to it, both in terms of time, financial and cost?
* How does execution deliver outcomes that are greater than the resources you put into it?

So in the execution layer we tend to have a number of roles. Typically the main elements of that will be a Marketing Assistant or a Marketing Coordinator, but you could actually have execution around aspects of that marketing element. So it could be a Digital Coordinator. It could be a Social Media Coordinator. It could be a Media Coordinator. But they're responsible for the execution of aspects of those marketing activities. So Marketing Coordinator, as an example, will tend to have one to five years experience and will typically be the second progression in a career when a graduate graduates from their studies and enters into that entry level role of Marketing Assistant. Typically the Marketing Coordinator is the next level above the Marketing Assistant. They're coordinating those marketing functions. They're starting to assess its return, and making sure that what's being delivered is working towards the performance indicators that you've set.

Your Marketing Assistant is the entry level role, and this will typically have a high component of on-the-job learning. Typically a Marketing Assistant will have completed studies around the field of marketing, and what they're learning in the role is the ability to apply that theory. Marketing is as much about the theory as it is about the application of that theory. The Marketing Assistant will be building their skills in the role and on the job and learning the processes, learning the ability to deliver against the theory and the subject matter that they've been studying in the field of marketing.

So key skills for both of those roles often incorporate event coordination, often embed communications.

* Are they managing events?
* What events do you have as an organisation?
* What outcomes are you seeking through those events?
* If they're fundraisers, are they generating surplus funds when you equate the costs, when you equate staff time, when you equate the opportunity costs and the other alternatives that could be delivered instead?

They may be responsible for the digital aspect, social media content, search engine placement. They may also be responsible for print production, collateral and offline collateral that is required to help communicate your messages. Typically that execution layer is involved in the delivery of those tangible outcomes.

# Slide 10 – The Marketing Function

So now we can explore our workbooks, and explore who is responsible for marketing and whether there's a clear separation of those roles. In our workbooks we can explore each of those roles:

* What their expectations are
* Who it is that they report to, and
* Are their position descriptions reflective of the roles that you've established?

Through there you can start to then explore:

* Is there a clear separation between each of these roles?
* Who is responsible for each of those three layers?
* Are they internal to your organisation?
* Are there external relationships in place?

Both configurations can be appropriate. There are strengths in maintaining internal marketing resources. There's also strengths to maintaining external marketing resources. The main imperative here is ensuring that there's the oversight, the accountability, embedded in place. Ultimately that is helped achieved by that separation of those three layers, the separation of strategy, management and execution.

What you're exploring is:

* Who is responsible for each of those aspects?
* Are they internal?
* Are they external?
* Are there skills and are there gaps that currently exist?
* How do you identify those gaps and explore about remediating and mitigating some of those gaps, bearing in mind that gaps in skills can create a degree of risk and a degree of uncertainty?
* How do you explore the ability to mitigate some of those gaps?
* What strengths does your organisation have?
* How do you build on those strengths, and how do you leverage those strengths, given that that should be part of the basis of your positioning in the market?

Typically you want to leverage your strengths and use that to reinforce the value that you provide to your target markets.

* How integrated is marketing within your organisation?
* If you have a marketing team, how integrated is it across your organisation?
* If you don't have a marketing team, how integrated are those various aspects of the marketing mix across your organisation, and the examples of when it worked and perhaps when it could have been improved?

What we're aiming to explore is:

* How do we foster collaboration between those teams?
* How does marketing interface and interact with other aspects of your organisation so that marketing is able to drive delivery around your strategic marketing plan?

# Slide 11 – Internal vs External

As we explore the roles and responsibilities, we're often confronted with the question of:

* Do we maintain internal or external relationships?

Ultimately the answer to this explores:

* What are our key capabilities?
* What internal skills currently exist?
* What gaps exist as well?
* If we have the skill-set internally, has it been validated so we've been able to determine that maintaining that internally is the best outcome for us?
* What gaps exist within that team where we may need to seek other resources, whether those resources are internal or external?

And one of the core opportunity costs that you need to equate is:

* What resources are available, and do you allocate those based on activities or personnel?
* If you have personnel that have core competencies in some areas and not in others, how do you mitigate some of those gaps?
* Do you allocate your marketing activities, your marketing outcomes, based on the personnel you have available or based on the activities that are required?

If you're looking at an activities-based model, that's where there may be merit in external arrangements. It's about starting to map what resources are needed, and the resources that are needed to deliver on the outcomes in your strategic marketing plan.

Regardless of whether these elements sit internally or externally, you need to once again be clear on how success will be measured, and this needs to be embedded in performance indicators.

* If you're managing external relationships, how do you ensure that they're aware of those performance indicators and delivering to it?
* What level of integration do you require to ensure that oversight and that ability for that execution layer to delvier on those outcomes?

Very important that you're clear on performance indicators, because this is ultimately how that execution layer in particular is going to be assessed, and how we determine whether campaigns and whether initiatives have worked and whether they haven't. And:

* What do we embed in place should something not work?
* How do we review it?
* How do we strengthen it?
* How do we improve it so the next time it generates the anticipated return?

# Slide 12 – Managing External Relationships

When we explore external relationships and where we're utilising external marketing-related resources - this could be around PR and communications, it could be around social media, it could be around graphic design or web, or various other aspects of marketing execution - there are some core imperatives. The first is that you need to identify the core outcomes.

* What outputs does that execution create that build into the marketing outcomes that you've identified through your strategic marketing plan?

You then need to determine:

* Which components require that external support.
* Which components require external support where you don't have the capability or capacity or the inclination to deliver them internally?

You need to, through that execution, understand the chain of activities, and we'll be exploring in the next module metrics and accountability, and the chain of activities that are required to deliver marketing outcomes.

In essence, marketing inputs like social media likes, like website hits, like picking up a brochure or holding an event and gaining participants, are inputs. The output is what is created through that input. So on social media it may be interaction with those posts. It may be discussion, resharing it, sending it through respective networks. If it's an event, it's people participating and then exploring further involvement with your organisation, or asking key questions around the value that your organisation provides. If it's web, it's around where did those web viewers navigate, and how many of them are actually lodging enquiries, or how many are looking at further engagement with your organisation. They're outputs that are created from those corresponding inputs.

The outcomes are based on:

* How does it help acquire new participants?
* How does it help strengthen the relationship you have with existing participants so that they retain you as a service provider?

You need to be clear on the outcomes that the inputs and the outputs that are created through marketing execution are helping to deliver, because that enables you to determine what activities are required and who best should be executing it.

The key here is to develop a project brief that identifies those core deliverables. What you don't want is for whoever's delivering execution to determine their own metrics, because those metrics may not necessarily be aligned with the outcomes your organisation is seeking. Content on social media is not an outcome. It's an input to further engagement. Content in media is not an outcome. It's an input into further engagement. There are areas where it's very important that you define those core metrics. Issuing media releases is an input to media engagement, which is your output, which then should lead to an outcome, whether it be the gaining of participants and that building of other steps along the decision-making process, whether it be donations or attending an event, and whatever other pieces of communications and elements of the marketing mix that you need to embed that call to action.

Execution is around achieving and delivering on the activities that you've set in the marketing plan, which is aligned with the outcomes that you're seeking to create. And this is why it's critical to develop a project brief that identifies those core deliverables, not only what you expect in terms of those execution providers, but also how it fits in to the broader context so that you can ensure that those execution providers are delivering outcomes that achieves your direction.

# Slide 13 – The Marketing Function

So, once again looking at our workbooks:

* What current marketing activities exist?
* Are they internal or external to your organisation?
* Why are they internal or external?
* Why do they sit within that current arrangement?
* How integrated is it?
* Are there design briefs that are provided for all external positions?
* Are those briefs clear on the outcomes that you're seeking to create?
* Do you have the policies in place to help govern acceptable behaviour and conduct and outcomes in those roles?

These are all elements that you need to explore in the delivery of marketing execution.

You need to explore the current areas of marketing activities.

* Who's responsible?
* Where does it work well?
* Where could it have been improved?
* Are you fostering collaboration around those internal and external arrangements?
* Are there design briefs, consulting briefs, that define that scope?
* Are they delivering in accordance with those briefs?
* If outcomes aren't being delivered in terms of expectations, how do you take corrective action?
* How do you ensure that those execution partners, whether they're freelancers, agencies, consultants, others that may be involved in execution, are delivering in accordance with the direction that is required?

It's about having the rigour and the good governance around it to ensure that marketing execution, no matter where it is internally or externally, is delivering a consistent direction that embeds and strengthens the decision-making process, and it embeds and strengthens that in accordance with your target markets, with your participants, with your stakeholders. It's about ensuring that those execution elements deliver tangible value, and that you can quantify - and we'll be exploring this further as we go through accountability to metrics - quantify the value that is provided, so you can start to determine where you get the best return from your marketing activities and how the marketing activities combined deliver outcomes that individually they couldn't.

It's very important that there's consistency across each of those communication elements. It's not only about consistency across the marketing mix, but also consistency within the marketing mix. Unfortunately it's far too common to have - and we see it far too often - where there'll be organisations with a web presence that will be completely inconsistent with its other content, with brochures, with its positioning in the market, with the layout of any physical locations. Each of those elements that are executed need to be consistent, as much as your marketing mix needs to be consistent across each of those seven elements.

# Slide 14 – Policies and Processes

To support this, we need the policies and processes in place to manage marketing activities, and this means that we need to actively maintain relevant policies and procedures. Some of these we're actually required to do so from a risk perspective. You should have a privacy policy. Any accreditation frameworks that you're part of will often have requirements around policies as well, and the processes that ensure that those policies are followed.

You should have a media and communications policy. That media and communications policy should explore not only offline media, but also social media. It makes sense for those policies to sit within broader media and communications.

* Who is it that you authorise to speak to the media?
* Who is it that's able to be authorised to speak to your organisation through social media?
* What is the reporting requirements around documenting media contacts?
* What are the key messages that need to be conveyed?
* What are the processes for engaging media?
* What are the processes for engaging online and utilising social media networks?
* What outcomes are you seeking from each of those respective tools?

You should have a sponsorship and partnership policy that explores not only financial contributions but also in-kind contributions.

* How do you manage risks associated with sponsorships and partnerships?
* How do you ensure that all sponsors are treated equitably and that there's a clear ability to articulate value to the sponsors as much as it provides value to your organisation?
* How do you ensure that those sponsors and partners don't tarnish the value that you provide?
* What is it that you're willing to provide in return for contribution and sponsorship?
* What are some of the non-negotiables?
* Are there particular industries that you do not wish to target for sponsorship as you need to prohibit on a matter of principles and ethics and values of your organisation?

Fundraising policies: The use of raising funds through fundraisers

* What fundraising activities do you deem to be suitable?
* Why are they suitable for your organisation?
* What outcomes are you seeking to create through those fundraising initiatives?
* What is considered acceptable conduct in the use of donor lists and the use of that data?
* How do you ensure that your donors receive the value that they should be expecting through the donation that they provide, and ensuring that that fundraising initiative is delivering value for your organisation?

On the back of these policies and through these policies you should have the processes that operationalise these policies.

* What do these policies mean to your organisation?

These policies need to be - and the processes that sit behind them - need to be actively maintained, and need to manage the governance of your organisation. They need to ensure that you have the right levels of delegation around who is responsible for what. This is around the delegation of responsibilities.

* Who's responsible?
* Where do decisions need to be escalated so that they can best make an informed decision?

And you need the design and consulting briefs around these so that when your policy's in place, your external partners are aware of their obligations. And if they're undertaking work on behalf of your organisation and effectively representing your organisation, that they are aware of the policies and the contexts and the potential requirements around those policies. It's imperative that those external parties maintain that consistent aspect that you've been creating through that experience, and they are as much part of that experience as your internal activities as well. Saying it's being provided externally doesn't abscond [sic] responsibility, so making your external partners aware of their responsibilities, their obligations through the policies and procedures that you have in place is fundamental. It's fundamental to managing those relationships and ensuring that you get the outcomes you need from an organisational perspective.

# Slide 15 – The Marketing Function

So when we explore the marketing function, we need to explore:

* What policies do you have in place governing the role of marketing in your organisation?
* Do you have a social media and communications policy?
* Do you have a privacy and confidentiality policy?
* What processes are particularly put in place around privacy and confidentiality?

If there are breaches of privacy, this can have serious ramifications, both legally and reputationally for your organisation.

* What policies, what security, what level of access, what delegated authorities do you have in place to maintain privacy and confidentiality?
* How do you ensure that those processes are embedded so that people don't do the wrong thing by mistake?

Breaches of privacy can carry fairly significant punitive penalties, and as a result it's very important that marketing, as other aspects of your organisation, should be well aware of their obligations within that privacy policy.

* What does that policy cover?
* Do you have sponsorship policies in place?
* What does that cover?
* Are there any potential exclusions?
* Are there areas around - does it look at who's been delegated to make those sponsorship decisions?
* Are there particular priority areas where you believe there's natural partners who may be partners for your organisation and mutual value?
* How does the sponsorship policy embed that and ensure that there's critical evaluation around the value that is provided?
* How do you ensure that you're not giving too much away through sponsorship and partnerships?

Fundraising:

* What governs fundraising in your organisation?
* What other marketing-related policies do you have?
* Are they actively applied in your organisation?
* Are they known across your organisation?
* Are there gaps in areas of knowledge around those policies?
* Are you maintaining, updating and supporting those policies, and making your team, your personnel, your external partners, aware of those policies?
* Are there gaps in how the policies are applied and the processes at work to support those policies?
* What gaps exist, and how do you help mitigate them?

Core elements that you need to explore in your policies and processes, and it's the policies and the processes that support those policies that help embed good marketing governance. We've explored a few of those core policies, but there are others, and it will depend on the nature of your organisation as to what policies you need in place. But effectively a policy should help embed good governance. When we explore this from a marketing context, those policies should embed good marketing governance, the ability to make informed decisions that are right for the organisation and govern acceptable behaviour.

# Slide 16 – Governance and Responsibilities

* That's ultimately what we're doing through governance. We're defining responsibilities. We're identifying performance indicators and we're looking at relevant areas of responsibility. We're exploring the need for consistency across the marketing mix and how those five aspects of, or the five pillars of good marketing governance, embed and help embed and maintain consistency. We need to ensure that each of those elements are taken into consideration, that just as when you explore good organisational governance and you develop a strategic direction, you maintain risk registers, you maintain financial oversight, you have the right people in the right roles, and that you measure performance and measure the ability to report back on your strategic direction, you need to do the same in a marketing context. How does marketing align with your strategic direction?
* How have you considered, controlled, mitigated and managed marketing-related risk?
* What marketing resources are required?
* How do you measure the return of those resources so you can demonstrate that your investment in marketing is generating a return that's greater than the cost of those resources that you put in place?
* What roles, responsibilities, are required to deliver on those marketing outcomes?
* What level of expertise is required?
* What broader skill-sets?
* What broader capabilities are needed?
* If you don't have those capabilities internally, do you need to look at external arrangements?
* How do you manage those internal and external arrangements?
* Is there clear separation of responsibilities?
* Who is delegated to deliver what, and what level of authority do they have before decisions need to be escalated for further consideration?

This is particularly an area where there's been far too many examples of risk through social media, and where a social media campaign was executed to results that have caused reputational damage simply because the ability to execute that campaign was delegated to too low a level. And if those campaigns were television commercials, if those campaigns were media, were in print, there would have been a far more rigid approval and delegation process. Yes, social media requires an element of flexibility, but that doesn't mean that you abscond [sic] control. It's around ensuring that decisions can be made that are of benefit to your organisation and reinforce good governance and your direction, because execution activities shouldn't be defining their own performance indicators. It means that there's then a loss of impartiality over measurement, and there's a lack of understanding across the marketing mix. That leads to inconsistencies, leads to an erosion of value, and then leads to a mismatch between what you're providing and what the market assumes that you're delivering, and that's what we're aiming to avoid. That's why we embed good marketing governance.

# Slide 17 – Organisational Structure

We need to explore our organisational structures, and explore how we can foster collaboration across our teams. Very rarely will you have a defined marketing function that's able to manage the entire marketing mix and has complete, a hundred percent control across the marketing mix.

* Who is responsible?
* What are the reporting lines around it?
* What are each of their roles across the marketing mix?

It's about determining each of those touchpoints across the marketing mix, and how marketing helps enable a greater sense of value. So how that marketing function, whether it be one person, whether it be a team, whether it be a combination of internal and external arrangements, helps define the elements of the marketing mix and demonstrate to service delivery staff how they're part of that marketing piece, and how the way they deliver service and the questions that they ask participants and some of the additional value that's articulated helps define that experience on the processes that are in place around the capturing and storing of data.

* How does marketing ensure that the right data is being captured so you can make informed decisions, and the ability to then measure marketing performance?

If you're not collecting data it makes it very difficult to measure performance and therefore make informed decisions.

Marketing and financial reporting:

* How are you reporting on budgetary allocations, budgetary spend?
* How does that align with the anticipated outcomes?

Marketing needs to collaborate and needs to work across a number of functions in an organisation. Marketing can't maintain itself as a silo. Unfortunately there's far too many examples of where marketing becomes a silo that may have discretion over promotions, the communications element of the marketing mix, but there's very little influence or even visibility across the other six. Marketing needs that visibility across each of those elements, and it needs the ability to influence and convey a market-facing perspective. That's the value your marketing team, or whoever has ultimate responsibility for marketing, should be delivering.

* How does it align with that value and demonstrate that value to the marketplace?

Marketing needs to coalesce all those internal elements and embed a market-facing approach, so those internal elements are facing the market and the market is responding to that in terms of acquisition and retention.

# Slide 18 – Roles and Resources

Your roles and resources begin through your strategic marketing plan, so your strategic marketing plan should be identifying the required resources, and it should be setting the performance indicators around them. As we delve into accountability and metrics we'll be looking at those performance indicators more closely. Out of that strategic marketing plan and the resources that are required, you should then be able to determine the roles and responsibilities.

* Who is responsible for what?
* What positions do you need?
* What is their reporting requirements?
* How do you assess marketing performance?

From there, we can then start to identify those key marketing metrics.

* How does each activity contribute to the outcomes that you're seeking?
* What ultimately is being achieved?
* Does it have an impact on your organisation?

Ultimately, through an NDIS model, your key metrics will be acquisition and retention. Yes, there'll be other metrics around market share, awareness, brand visibility, brand equity, but ultimately it is around:

* Are we able to acquire clients?
* Are we able to retain them?
* Are we able to acquire stakeholders, and an understanding of how stakeholders influence decisions, and retain relationships and maintain those relationships with stakeholders so we're able to deliver mutual value to them?

They're the key marketing metrics that need to be embedded through those roles and responsibilities.

* What metrics are each of those roles responsible for?
* How are they being assessed?

That should determine your performance indicators and assessing performance around the job that is being performed.

# Slide 19 – Collaboration

Collaboration tends to be a bit of a buzzword, but often it's the role of marketing to influence elements of the marketing mix, and that does require a collaborative approach.

* How do you foster collaboration both internally in your organisation as well as externally?

The first is to understand the problem that you're solving.

* Is there a mismatch between the products and services that you offer and the way that they're offered to what outcomes your market and your participants are seeking?
* What is the problem that you're trying to solve?

Marketing needs to take the lead in undertaking some of that research, and identifying the gaps in the marketing mix and how other elements need to support that consistent, market-facing appearance.

* Are there gaps in processes that erode the ability to capture data, capture relevant information that helps you shape the decisions that participants are making?
* If you're not capturing that data, is it because questions aren't being asked, or are there gaps in processes around data collation?

Marketing should be able to re-examine that decision-making process that's undertaken by your stakeholders so that you can strengthen the marketing mix.

When there's collaboration, you need to articulate what success looks like.

* How is it going to be measured?
* Who's going to be responsible for driving those outcomes?
* What mechanisms do you use for its delivery?

Depending as to the size of your organisation you may have steering groups or committees overseeing various aspects, and bringing together those teams and providing that strategic guidance to deliver those outcomes and overseeing those activities. Or it may simply be internal working groups that are working on projects collaboratively, and ensuring that, say, if you're embedding a new customer relationship management system, that marketing is part of that conversation around, well, these are the fields that we need to capture relevant data. Because if marketing can't access that data and can't make decisions around that data, it makes it very difficult to drive strategic decisions, and very difficult to then assess broader marketing performance. So if you're embedding a new CRM system, it's not just the IT exercise. It's not just the process exercise. It's also about engaging marketing as part of that to ensure and to understand what data needs to be captured and how you report on that data, and then what outcomes that data's going to provide. This is about fostering a sharing of marketing outcomes, and ensuring that there's a shared sense of purpose and shared vision that you foster and create through a clear understanding of the outcomes that are required.

# Slide 20 – Capabilities and Capacity

Part of defining roles and responsibilities is about in turn determining:

* What capabilities do you need in your organisation?
* What capacity do you have to put in place the skill-sets required to deliver on those capabilities?

You need to identify through your strategic marketing plan the core skill-sets that are required, and define from there the marketing responsibilities and separate that, based on our good governance model of separating strategy, management and execution, and in turn define the performance indicators that help reinforce good governance. It's about maintaining accountability, ensuring consistency, ensuring cohesiveness, around the vision, the direction and the outcomes that you're seeking to create.

* How do we draw the capabilities that we need to strengthen our internal capacity to deliver a market-facing organisation?

# Slide 21 – Outcomes

As we draw this module to a close, we need to remember that marketing requires input and visibility across various levels and aspects of your organisation. Marketing needs to take carriage and responsibility for the management of the marketing mix, for the management of your stakeholder experience. It's more than just promotions. It's the other elements of the marketing mix as well, and if they're not direct marketing responsibilities, how does marketing ensure that it's embedding a market-facing culture within those aspects, and embedding that across your organisation?

You need to maintain and consider where you draw the appropriate roles around the three layers of good governance, separating strategy, management and execution, and then explore how those roles fit within your organisation and how collaboration can help build your capacity and draw together skill-sets across your organisation to bolster internal capacity. It's about ensuring that you're able to utilise the people that you have, the resources that you have, and deliver optimal outcomes.

Thank you once again for your participation in our marketing governance series. This has been the section and the module on roles and responsibilities. This is followed by our final module exploring accountability and metrics, and that module will very much tie some of these core elements together with the frameworks in place to measure marketing performance.

Thank you again for your participation, and look forward to your continued involvement as we explore accountability and metrics.