WEIDERT GROUP

B2B inbound marketing agency

Quarterly
ROADMAP
Worksheet

QUARTERLY ROADMAP *Overview*

THE PURPOSE OF A ROADMAP

Because markets and technologies are constantly changing, the marketing initiatives you plan for and intend to deploy in the coming 6 to 12 months may quickly become ineffective – possibly even obsolete. Breaking your annual plan down into 4 quarterly marketing "roadmaps" allows you to be flexible throughout the year, adjusting elements and approaches as needed. With inbound marketing, you can leverage prospect, customer and website visitor data in real time, then modify plans at the start of each 90-day period to ensure the right initiatives are in place to reach your goals.

Executing your marketing plan in 4 quarterly roadmaps allows your team to:

- Create discipline around identifying what is/isn't working, and adjust tactics and redeploy resources as needed to reach your goals
- Take actionable steps more frequently; instead of waiting until the end of the year and taking "best-guess" steps to improve in the coming year

HOW TO USE THIS WORKSHEET

This document includes both examples and blank worksheets you can use to draft a basic quarterly roadmap. Begin by reviewing Considerations (next page); this will help you understand the importance of metrics in identifying where you should focus efforts in upcoming roadmaps (and why).

QUARTERLY ROADMAP *Considerations*

MONITORING & METRICS

- Regularly monitor data generated by your marketing automation platform (and any additional analytics, like Google Analytics) you've installed; measure monthly to eliminate extra work at quarterly planning stages. Consider using a tool such as Databox to streamline efforts

- Monthly metrics help you keep a pulse on programs and progress and pinpoint the adjustments that may be needed. They'll also help determine quarterly focus areas and you set program goals

DEFINE FOCUS AREAS

- Use metrics to identify 4 to 5 focus areas each quarter; the number and type of focus areas may depend on your marketing program and its longevity, budget, any one-off initiatives happening during that quarter (e.g., product launches, trade events, etc.)

HELPFUL TIP: These are some common Focus Areas

Website Attraction

- Improve Referral Traffic
  - Industry directories
  - Trade media articles/outreach campaigns
- Perform Search Engine Optimization (SEO)
  - Technical updates (site navigation, structure, page titles, meta descriptions)
  - Content strategy adjustments (e.g., optimize articles, pillar content implementation)
- Initiate pay-per-click (PPC) campaigns
- Publish campaign-centered/blog content

Website Enhancements

- Improve user experience (UX)
- Optimize pages
- Incorporate video

Conversion Rate Optimization

- Lead segmentation & nurturing workflows
  - Nurture key accounts/personas/segments
- Increase visits-to-contacts ratio
  - Place conversion opportunities higher on the page
- Trade show support
  - Integrate show initiatives/lead gen efforts into the overall Inbound Marketing program
- Create geo-targeted landing pages
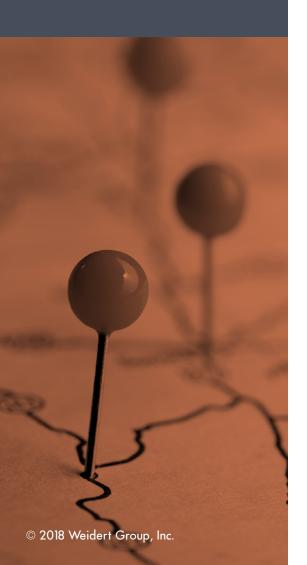- Develop and publish video

KEY FOCUS AREAS *Example*

KEY FOCUS AREA	WEBSITE ATTRACTION	WEBSITE CONVERSION RATE OPTIMIZATION	LEAD SEGMENTATION & NURTURING	TRADE SHOW SUPPORT
KEY INITIATIVES	Adjustments to content strategy & SEO strategy based on creation of new Pillar Page, including: • Identification of highest priority Pillar Page • Research of various topic clusters • Content inventory audit to determine content gaps • Creation of updated editorial calendar based on identified content gaps	Implement strategic website enhancements to website Homepage and Services Overview page to further engage website visitors and increase new lead conversions, including: • Introduction of slide-in CTA graphic • Adjustments to on-page conversion form	Introduce new lead segmentation rules based on Industry and Biggest Challenge form properties. This segmentation will be automated and will be the initial step for introducing more targeted lead nurturing sequences.	Initial strategizing, planning and support for ABC trade show in 2019, with the plan to capture more leads when they visit the booth.
RESOURCE ALLOCATION	35%	20%	20%	25%
GOAL	Complete content inventory and updated editorial calendar by June 29; complete development of new content for creation of Pillar Page by July 27.	Increase overall website visitor-to-contact ratio from 1.0% to 1.5% by August 31.	Increase overall engagement (open & click rates) of lead nurturing sequences.	Define key elements of 2019 trade show strategy by July 31 so that next steps can be addressed in time for the next Roadmap.

KEY FOCUS AREAS *Worksheet*

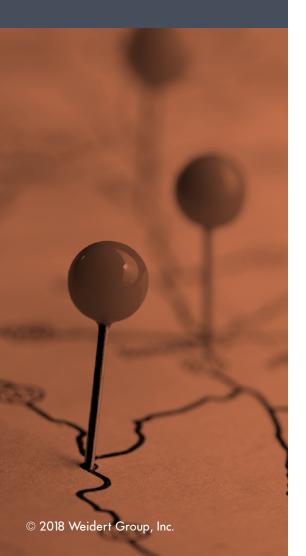| KEY FOCUS AREA	KEY FOCUS AREA 1	KEY FOCUS AREA 2	KEY FOCUS AREA 3	KEY FOCUS AREA 4
KEY INITIATIVES				
RESOURCE ALLOCATION	%	%	%	%
GOALS				

DETAILS +
TIMING:

Example

FOCUS AREA: Website Attraction

Adjustments to content strategy & SEO strategy based on creation of new Pillar Page, including:

KEY INITIATIVES

- Identify which pillar page we'll work on during this quarterly roadmap by reviewing analytics (and buyer personas and buyer journeys) to see which will have the greatest impact on our KPIs

- Identify 5-10 clusters for the pillar page we identified by Month 1 Week 3

- Based on the clusters we picked, do a content audit to determine where we have gaps. Do this during Month 2 Weeks 1-2

- Create or update our editorial calendar based on the gaps. Determine when each content piece will be created

DETAILS + TIMING:
Worksheet

FOCUS AREA: _____

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KEY INITIATIVES

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TIMING *Worksheet*

Once you've identified key initiatives for the quarter, determine timing and duration of each. Use this type of template to maximize your roadmap's success.

	MONTH				MONTH				MONTH			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
KEY FOCUS AREA 1												
KEY FOCUS AREA 2												
KEY FOCUS AREA 3												
KEY FOCUS AREA 4												