

*This session is being recorded and slides will be provided following the webinar.*

# HOW TO ACE YOUR MARKETING BOARD DECK

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MAY 19, 2021



NORWEST

# TODAY'S SPEAKERS



**LISA AMES**

*Operating Executive*



**ROB ARDITI**

*General Partner, Co-Head of  
Growth Equity*



**SCOTT BEECHUK**

*Partner, Venture*

# PORTFOLIO SERVICES

Norwest offers portfolio companies a platform of advisory services and a connected network to help save them time and money.



**KATIE BELDING**  
*Partner,  
Portfolio Services*



## Talent & Retention

Build and retain a killer team



## Business Development

Connect with the right people



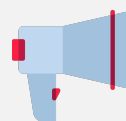
## Corporate Development

Strategic advisory and guidance as you scale your business



## People Advisory

Build your organization strategically



## PR & Marketing

Promote and grow your brand



## Operations Strategy

Navigate the legal, financial, and real estate waters



## Community

Leverage Norwest's broad portfolio community

# AS AN 'INVITED GUEST', LISA HELPS COMPANIES WITH...




Team & Process  
Assessment

Strategy  
Development  
& Ideation

Execution  
Oversight

Best Practices  
& Results  
Benchmarking



Business  
Planning

Org Design  
& Recruiting

Coaching  
& Thought  
Partnership

Resource  
Introductions

# YOUR PEERS HERE TODAY



# BOARD MEETINGS: FRIEND OR FOE?



vs.



# WHY DO WE SOMETIMES DREAD BOARD MEETINGS?



A lot of work



Uncertainty



Fear of failure



# AS MARKETERS, WE HAVE IT HARDER...





# BOARD MEETINGS ARE A TWO-WAY EXCHANGE OF VALUE

THE IDEAL FORUM TO...

- Align on priorities
- Celebrate wins
- Promote your team
- Collaborate



# GAINING THE BOARD'S CONFIDENCE

AKA HOW TO AVOID DISASTER



Zoom out



Be candid



Ask for help



Mind time

# QUESTIONS YOU MIGHT EXPECT FROM THE BOARD

BE PREPARED TO ANSWER...

What are the drivers  
of growth or  
underperformance?

Where should we be  
investing more dollars  
and what outcomes  
would that drive?

WHAT'S THE  
PLAN?!

What are the  
opportunities for  
improvement/risks?

What are  
competitors doing  
better than we are?



**WHAT SHOULD GO INTO MY DECK?**



# A WORD OF CAUTION

**Don't conflate  
board materials  
with board  
discussion!**



# BOARD DISCUSSION SLIDES

- **Summary/At-a-Glance**
  - Highlights
  - Challenges
- **Key Results this Quarter**
  - MQL and pipeline trends
  - High-value leads (ie, demo requests)
  - Marketing-sourced deals
  - Awareness/category results
- **Spotlight on key initiatives/areas for discussion**
- **Key Learnings, Opportunities for Further Investment & Where You Need Help**
- **Appendix slides**

**See “Bonus Material” in the  
appendix for pro tips  
and B2B Metrics**

# EXPAND YOUR AUDIENCE

**Share your deck and relevant discussion points with your team following the board meeting!**









ASK ME ANYTHING

**NO QUESTIONS OFF LIMITS –  
YOU'RE AMONG FRIENDS!**

**JOIN US TUESDAY, JUNE 22**



**CHRIS WALKER**

CEO, Refine Labs and  
Host of State of  
Demand Gen podcast

FIRESIDE CHAT & AMA

# The New Rules of Digital Advertising

# CALL FOR TOPICS & SPEAKERS

**Would you like to speak on  
a future webinar?**

**Contact Lisa Ames**

**[lames@nvp.com](mailto:lames@nvp.com)**

# THANK YOU

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**Reminder that I'll send the slides and  
recording shortly!**

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# **BONUS MATERIAL**



# PRO TIPS – THINGS TO AVOID IN YOUR DECK

- ✓ Lots of data without context - i.e. no QoQ or YoY comparisons; no baseline to know if the results are good or bad.
- ✓ Presenting an all good/rosy outlook. (Covered earlier, but worth repeating). For ex, don't talk about great lead results if overall pipeline is behind plan as this shows a disconnect between sales & marketing and overall lack of awareness of the business.
- ✓ Extreme overperformance vs goals - if you're more than 120% of goal, it tells the board that you don't know how to forecast (exceptions: early-stage companies or new strategies that lack historical data).
- ✓ Diving too deep into the weeds and losing sight of more uber, strategic directions - not getting to the "why". (Mentioned earlier as "zoom out").
- ✓ Upstream/vanity metrics such as email opens/clicks, advertising impressions and clicks, landing page performance, MELs/responders, etc, unless you've discovered something groundbreaking in which case you can include it in the "Key Learnings" slide.
- ✓ Filler content such as social media strategy, video production, blog calendar, webinar calendar, etc. However, can be useful in some cases in the appendix.

# THE KITCHEN SINK – B2B METRICS

IDEAL FOR THE APPENDIX OR CURATED PORTIONS PULLED INTO MAIN DECK TO SUPPORT STORYTELLING

- **MQLs vs goal**
  - Conv rate from MEL/responder
  - % from target account list (if ABM in place)
- **Number of high-value MQLs (ie, demo requests)**
  - % increase over last quarter
- **SQLs/Stage 1 opptys driven by marketing vs goal**
  - % of total (shows marketing contribution)
  - Conv rate from MQL
  - % from target account list (if ABM in place)
- **Stage 2 opptys (Pipeline #) driven by marketing vs goal**
  - % of total (shows marketing contribution)
  - Conv rate from SQL
  - % from target account list (if ABM in place)
- **Stage 2 opptys (Pipeline \$) driven by marketing vs goal**
  - % of total (shows marketing contribution)

# THE KITCHEN SINK – B2B METRICS (CONT.)

IDEAL FOR THE APPENDIX OR CURATED PORTIONS PULLED INTO MAIN DECK TO SUPPORT STORYTELLING

- **Trailing 6-quarter trend of MQLs by (bucketed) campaign type**
  - Optional: overlay high-value MQL trend (ie, demo requests)
  - Explain peaks & valleys
- **Trailing 6-quarter trend of MQLs and TOTAL pipeline (both S&M driven pipe)**
- **Marketing-generated closed-won deals this quarter/year with logos**
- **Website traffic – trailing 12-month trend**
  - % organic vs paid
  - % from target accounts
  - Traffic to lead conversion rate vs goal
  - SEO: positions and keyword strategy highlights
- **Awareness/Category Highlights**
  - Notable press & analyst coverage
  - Strategies for positioning the company and brand
  - Trailing 6-quarter trend of press articles & mentions
  - Share of voice

# THE KITCHEN SINK – B2B METRICS (CONT.)

IDEAL FOR THE APPENDIX OR CURATED PORTIONS PULLED INTO MAIN DECK TO SUPPORT STORYTELLING

- **Channel performance (see screenshot below)**
- **ROI by channel**
  - Highlight areas where spend could be more efficiently directed. From time to time it's helpful to aggregate program costs into a semi-annual or yearly view to show % of spend vs % of outcomes generated. For ex, you might spend 10% of the budget on webinars and the webinar program generates 30% of the pipeline opportunities.

Campaign Type	Campaign Cost Start	Responders	Cost per Resp	Sourced Opps	Cost per Sourced Opp	Responders to Opps	Sourced Opps Won	Sourced Won ARR	Opps to Won	Cost per Deal	Responders to Won
Website (M)	\$0	4,515	\$0	230	\$0	5.09%	36	\$676,848	15.65%	\$0	0.80%
Paid Social (M)	\$47,011	493	\$95	11	\$4,274	2.23%	3	\$44,000	27.27%	\$15,670	0.61%
Email (M)	\$0	1,604	\$0	56	\$0	3.49%	8	\$171,590	14.29%	\$0	0.50%
Conference (M)	\$118,046	724	\$163	66	\$1,789	9.12%	15	\$253,860	22.73%	\$7,870	2.07%
Paid Search (M)	\$49,600	2,381	\$21	75	\$661	3.15%	12	\$297,762	16.00%	\$4,133	0.50%
Third Party Program & List (M)	\$130,475	2,422	\$54	36	\$3,624	1.49%	0		0.00%		0.00%
Webinar (M)	\$0	20,308	\$0	300	\$0	1.48%	33	\$705,637	11.00%	\$0	0.16%
Field Events (M)	\$39,070	158	\$247	5	\$7,814	3.16%	1	\$20,800	20.00%	\$39,070	0.63%
Grand Total	\$384,202	32,605	\$12	779	\$493	2.39%	108	\$2,170,497	13.86%	\$3,557	0.33%