



“This is a presentation about what it takes to create and sell something remarkable. It is a plea for originality, passion, guts and daring.”

--- Seth Godin

Goal Planning and Strategy



Presentation Topics

What is Goal Planning and Strategy?

Goal Setting

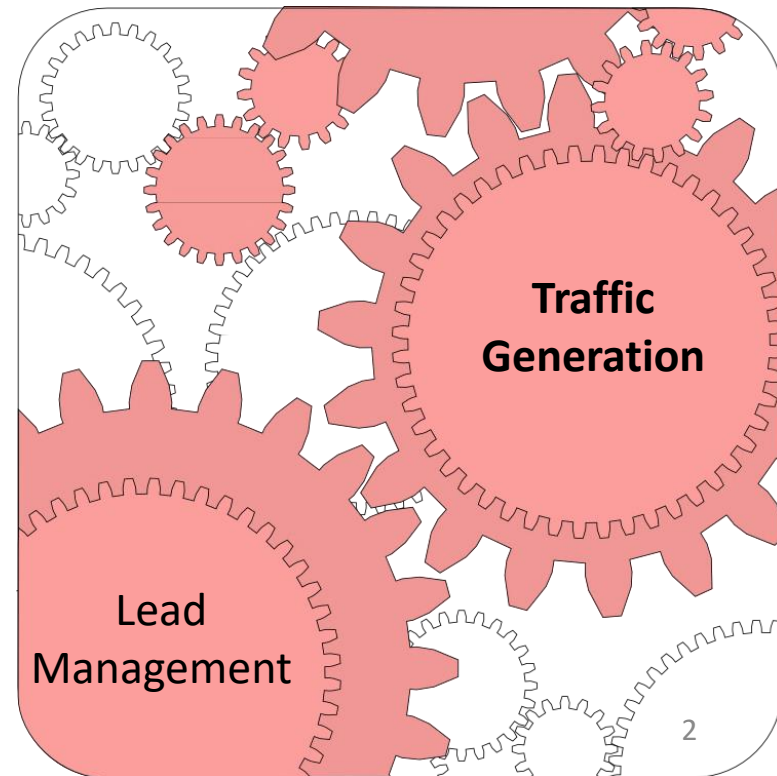
- Definition
- Examples

Goal Setting

- Worksheet
- Examples

Goal Setting Tasks

- Set Goal
- Set Timeline
- Determine Assets
- Assign Responsibilities
- Determine Actions





SMART Goal Setting

SMART GOAL SETTING

S Specific

M Measurable

A Attainable

R Relevant

T Timely

SMART GOAL SETTING

Specific: Visits, Leads or Customers

When creating a goal, you want it to be as short, crisp, and specific as possible.

Having "a good marketing year" isn't a reflection of where your company is interested in goal.

Imagine that your boss is about to leave for vacation, and you have less than 90 seconds until he/she runs out the door, and all they want is to quickly hear what next year's goal is -- what are you going to tell them rapidly that concisely explains the marketing goal?

SMART GOAL SETTING

S Specific: Visits, Leads or Customers

M Measurable: Provide a number

Oftentimes, companies say they want to "increase their social media following." While that is a goal, it's not a trackable goal.

If you start the new year with 10 followers, and end with 11, technically you met your set goal. But if you switch that goal to read, "we want to increase social media following by 25%), suddenly you can measure your progress every month to see if you're on track to ultimately jumping from 10 to 12.5 followers. Now you really know you hit your goal -- hopefully it's more ambitious than this example!

SMART GOAL SETTING

S Specific: Visits, Leads or Customers

M Measurable: Provide a number

A Attainable: Understand benchmarks

While having history-breaking goals are beneficial, it's still important to keep these goals realistic. If in your company history you've generated an average of 10 leads every month, jumping to 2,000 leads per month would be a drastic change. Many businesses do this to push employees and to "go as far as they possible can." But in reality, all this does is discourage the worker as he/she sees they can never actually be successful.

SMART GOAL SETTING

- S** Specific: Visits, Leads or Customers
- M** Measurable: Provide a number
- A** Attainable: Understand benchmarks
- R** Relevant: Relates back to overall end goal

Why have a goal if the goal doesn't matter? Say you're a teddy bear that has 100 stores who will only accept 10 teddy bears per month in their toy store. In this situation, your goal likely shouldn't be to "increase production of teddy bears from 1,000 per month to 5,000 per month." While it's great you have more product, if no one is going to take them for sale, why bother? Your goal should be something along the lines of, "increase distribution channels by X%."

SMART GOAL SETTING

- S** Specific: Visits, Leads or Customers
- M** Measurable: Provide a number
- A** Attainable: Understand benchmarks
- R** Relevant: Relates back to overall end goal
- T** Timely: Include time-frame

While having the aforementioned helps develop a solid goal, you need to ensure you have a timeline for meeting that goal. Going back to the teddy bear example, if you do decide that your goal is to increase distribution channels, you need to know when you will accomplish this in order to know when to start working on a secondary goal of increasing teddy bear production. You don't want a situation where you end up with more toy stores taking your teddy bears, but no teddy bears to give.

SMART GOAL Template:

Increase _____ by _____ (starting at this amount _____ and go to this amount _____ per _____) by this date _____.

SMART GOAL Example:

Increase visits by 50% (5,000 per month to 7,500 per month) by September 30th,

- S** Specific
- M** Measurable
- A** Attainable
- R** Relevant
- T** Timely

Set your SMART Goal



Review your monthly historical conversion rates, as well as the median and 25th percentile rates across HubSpot's thousands of customers.

	Your Last Month	Top 25%	Median
Visits	29,056	14,770	1,508
Visits Conversion Rate	0.024%	3.1%	0.93%
Contacts	7	452	14
Contacts Conversion Rate	0.0%	56%	7.1%
Customers	0	255	1

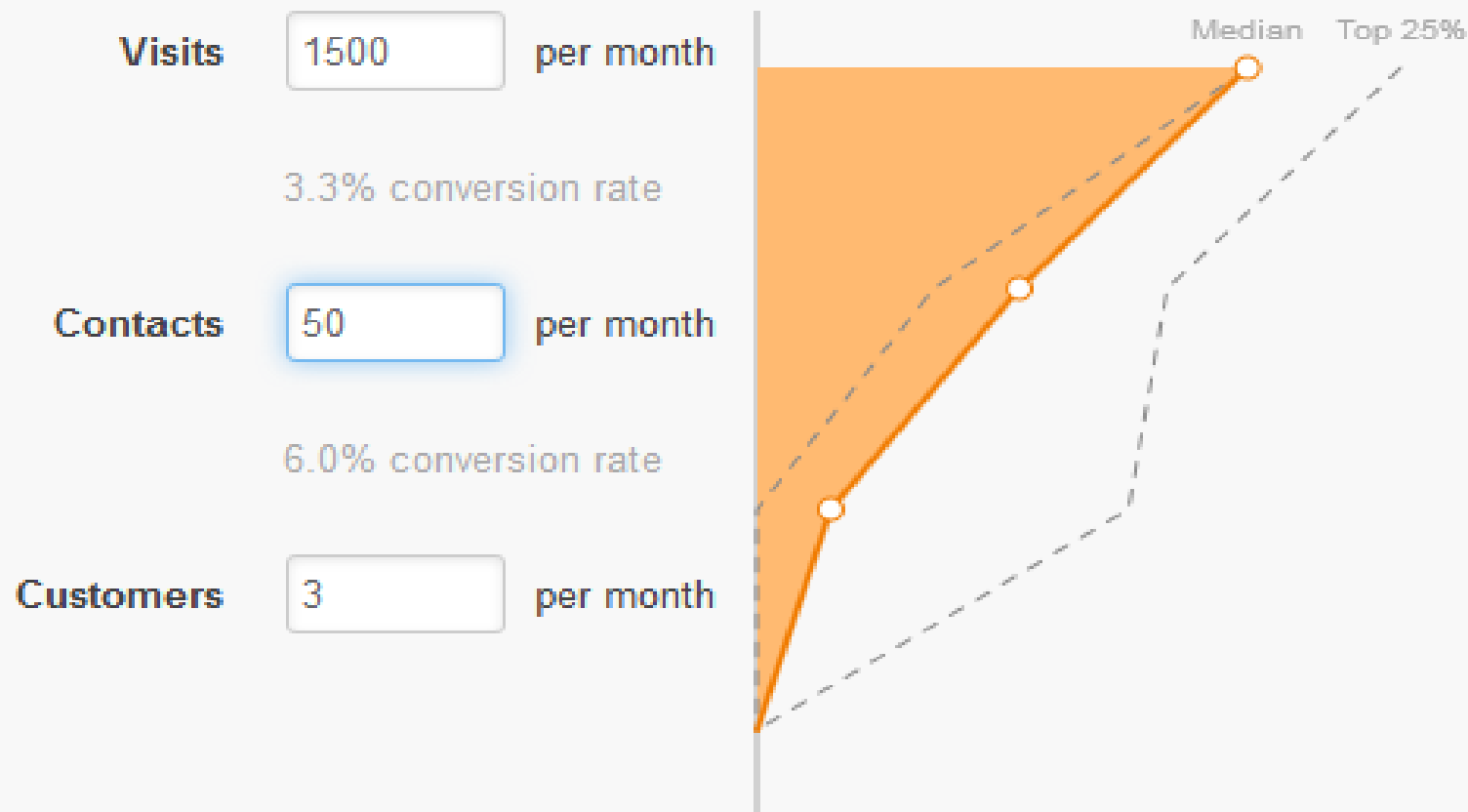
My goal is new in months

Next

Set your SMART Goal



Here is a visualization of your monthly goal based on your historical performance. You can edit it below.



Back

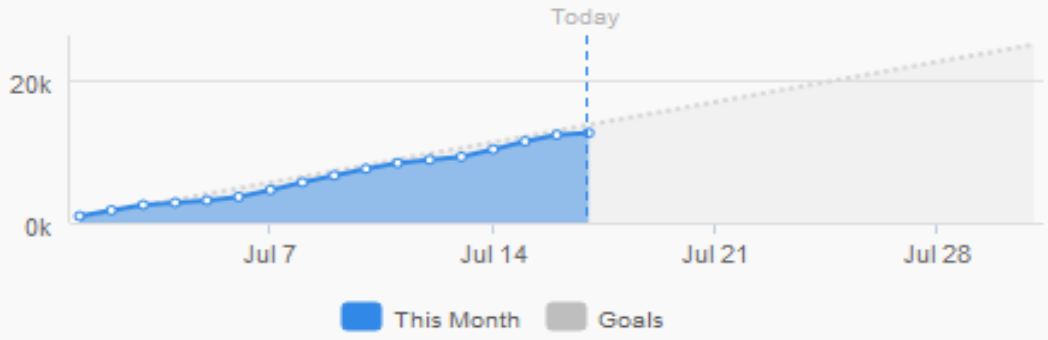
Save Goals

Marketing Performance in July



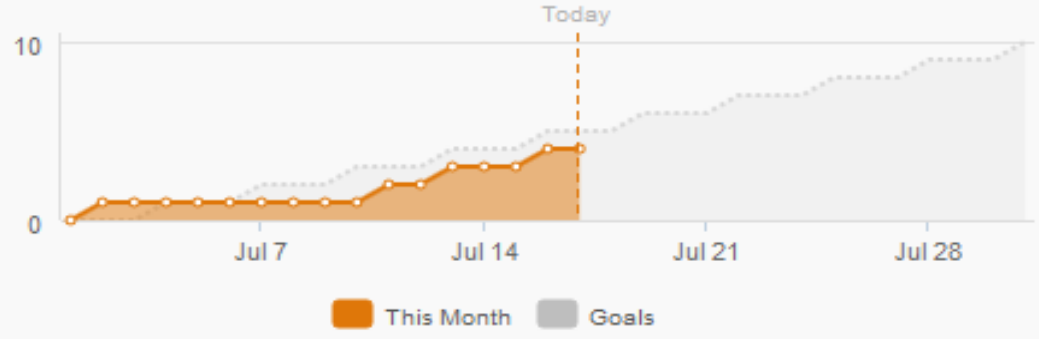
Visits
12,591 compared to 13,709
↓ Behind 8.16% (1,118)

0.03%

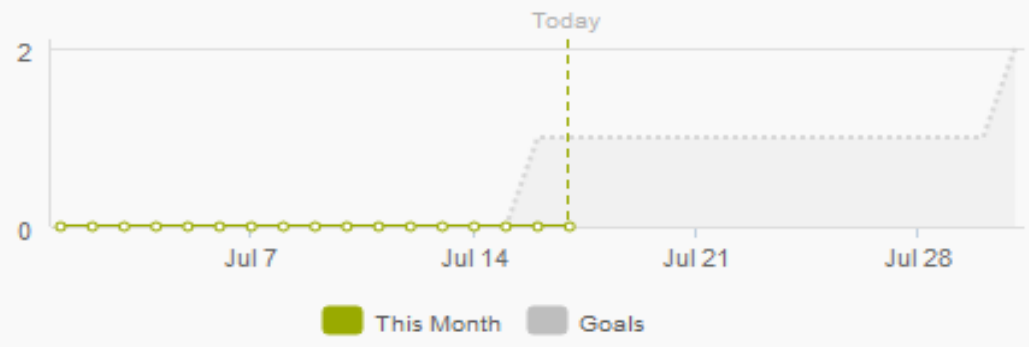


Contacts
4 compared to 5
↓ Behind 20% (1)

0%



Customers
0 compared to 1
↓ Behind 100% (1)





Inbound Project Worksheet

Create and execute your inbound project worksheet within the specified timeline to reach your goal.

Research: Identify your Goals and Timeline

Goal: Increase visits by 50% (to go from 1,000 to 1,500)

Timeline: By end of August

Design: Identify your Project Assets

Take stock of what assets will be built. e.g. landing pages, emails, blog posts?

Execute: Delegate Action Items

Date	Person	Action

Questions? ✉ academy@hubspot.com

You are a project manager.



Blog 2x/week - 4 hours

Optimize on-page SEO - 2 hours/week

Publish social media message - 15 min/d

1 Press Release in time-frame

Attract 1 inbound link/month - 1hr/week

Convert 1 blog to other media format 1/hr

Execute: Delegate Action Items

Date	Person	Action
4/15/	Sarah	Write 1 blog article - 2 hours
4/15/	Sarah	Autopublish blog content & share other content - 15 min.
4/16/	Lindsay	Optimize on-page SEO - 2 hours/week
4/17/	Lindsay	Write 1 blog article - 2 hours
4/17/	Sarah	Autopublish blog content & share other content - 15 min
4/18/	Sarah	Compile list of potential inbound links



Thank You!

innovation