Best practices for campaign planning

8 tips to help your marketing team work as one.

Airtable

Table of contents

Introduction

Duplicative work. Competing priorities. Coordination that isn't quite...coordinating. Marketing leaders are battling an onslaught of campaign and content requests, and they're struggling to deliver a coherent experience for their customers.

In a recent survey of 300+ marketing leaders, 95% of leaders reported a jump in the volume of campaign requests in the last year, and that their teams' workload increased by more than half, causing widespread stress and burnout. Our customers are experiencing the same intensity, juggling expectations from leadership, requests from across the org, and the wellbeing and engagement of their own teams.

Many leaders depend on strong planning processes to help their teams stay motivated and moving as one. But spiraling numbers of stakeholders, painful labyrinths of email chains, and constantly shifting priorities can make "planning time" a dreaded endeavor. Even worse, plans may be committed to in silos, meaning different functions will continue to work against different deadlines, without a common thread between deliverables—and no shared impact across the marketing org.

World-class campaign planning should unite your team from the outset, giving you a framework for prioritization as well as a rationale to say "yes" or "no" to the torrent of requests that shows no signs of slowing. Silo-proof planning is good for your team's culture, too: It deeply connects employees to cross-functional partners, and brings more purpose to their work.

What do we mean by world-class campaign planning?

Among the most successful marketing teams we work with, leaders aim to plan organized, integrated campaigns that, taken together, tell a single story. The term ‘integrated’ captures the multi-channel aspect of these campaigns—depending on your organization, they might span your blog, PR, email, social, paid marketing, and more, working together to address the entire customer journey.

As Mckinsey puts it: “[An integrated] approach isn’t just about doing more across each stage of the funnel. It’s about understanding how each of the stages impacts the others for a complete customer experience—how media spend can boost the impact of personalized emails, or how social media ad campaigns can drive online and in-store visits.”

When planned well, integrated campaigns manifest a delightful customer experience and pave a seamless journey from awareness to conversion. Research from Gartner reports integrated campaigns outperform single or dual-channel campaigns by 300%. And, where traditional advertising, (non-integrated ads on social media, TV, print, and outdoors) can be “intrusive” or “irritating”, Kantar Millward Brown found integrated campaigns are 31% more effective at building brands.

The purpose of this ebook is to help your team plan as one. It includes best practices from our enterprise customers, who have shared their secrets to driving massively scaled, multi-channel campaigns. These strategies will help you set goals, share data, manage requests, and prove your value as a marketing powerhouse. Consider them a gentle nudge returning you to the driver’s seat of your marketing strategy, and a framework to push you forward as you reinvest in the creativity, messaging, and ideas that only your team can share with the world.

The 'why you're here' checklist: Are any of these experiences familiar?

- ☐ **Siloed operating:** Your marketing team thinks and acts in silos, with each function unaware of (and unable to find) what another function is delivering. This leads to duplicate or redundant work, and drains overall team performance.
- ☐ **Too many sources of information:** Because there are so many places where information and data is stored, it's impossible to get a quick, accurate read on ongoing marketing activities. This means you're unsure whether the update you just shared with leadership is still accurate, and you dread answering even basic questions about your team's work.
- ☐ **No shared language:** When one marketing function describes their work, the words they use (like asset, activity, deliverable, or campaign) aren't the same as other functions'. This lack of shared language runs deeper than the words themselves; disparate taxonomies often mean deeper misalignment.
- ☐ **Can't keep up with requests:** Content requests are coming in quickly, and individuals on your team are helpfully responding with emails, Slacks, and Zoom calls. But, because you don't have a centralized place to track these requests, you're not 100% aware of all the work being done across your team (or why it's been prioritized).
- ☐ **Reporting is a nightmare:** It takes hours, if not days, of bouncing between tools and following up with individuals to understand what work has been completed and the results you have to show for it. Even after you've uncovered your team's wins, it's difficult to prove how they connect to company-wide goals and why leadership should pay attention.

You're not battling these challenges alone

If you checked 'yes' to any of these pain points, you're not alone. Based on our work with countless marketing teams, these challenges are widely shared and they tend to stem from three key problem areas:

1. **Disorganized data**
   Data is duplicated across different marketing tools, and information is hidden in emails or spreadsheets.
2. **Painful processes**
   Teams don't plan, deliver, or launch assets in repeatable (aka scalable) ways.
3. **Controlling culture**
   When employees don't have the autonomy to identify problems and experiment with solutions, they disengage.

Featuring: In this ebook you will hear from experts who have been in your shoes, and who are well-positioned to share actionable, insightful takeaways to help your marketing team move as one.

Meagan Nelson

Publishing Manager at Equinox Media

Meagan manages the publishing schedule and launches new types of digital content in the Equinox+ app, which offers classes and other fitness-focused content. Previously, Meagan worked on the agency side in PR and social media.

Jenny Bodenlos

Head of the Enterprise Program Management Organization at BlueOcean

Jenny oversees all project work end-to-end at BlueOcean, a brand tracking and measurement software company, and is expertly focused on optimizing the customer journey. Previously, Jenny was director of business operations at Nike.

Nicole Dahl

Marketing Project Manager at Taylor Guitars

Nicole manages timelines and resources for marketing campaigns at Taylor Guitars, the leading global manufacturer of acoustic guitars. Previously, Nicole was show marketing manager at House of Blues Entertainment.

Navneet Grewal

Head of Integrated Marketing Campaigns at Airtable

Navneet leads our campaign strategy across all channels, and her team forms the connective tissue between product marketing, content, and creative. Previously, Navneet has worked at Veeva Systems, ServiceNow, and Salesforce.

Best practice #1

Introduce an integrated mindset

“It’s such a missed opportunity at the moment of a campaign launch when you realize that, if you’d only thought about the story or customer positioning from the start, you would have shaped the solution or timing differently. That’s what we are trying to avoid by creating a collaborative environment with transparency from the outset.”

— Jenny Bodenlos, BlueOcean

Best practice #1: Introduce an integrated mindset

Creating this collaborative environment, where you have the information you need to anticipate trends and outperform competition, means embracing an integrated mindset. Here's what that looks like:

Before: Functions within marketing plan within their silos; they might respond to copy or design requests from other functions, but their plans are based on their own data, without input from cross-functional stakeholders. There is no global alignment on priorities, which means employees spin in different directions and work doesn't match up across the marketing org.

After: Cross-functional teams plan together by connecting work and sharing data. Initiatives are aligned from the outset, unifying content, product marketing, and campaigns to create a cohesive, entwined customer experience. Integrated campaign planning also streamlines the work itself; by synchronizing workflows, it's possible to build repeatable, scalable processes.

Best practice #1: Introduce an integrated mindset

Create a culture of teamwork, not heroics

Before your marketing team can plan together, you'll need to dismantle silos and deepen team trust. Team members can no longer view themselves as rulers of their own private islands, and instead they must invest in building connection. Here are some ways to foster that culture:

1. **Honestly examine current processes**
   Create space for employees to ask questions, give and take feedback, and honestly examine the "why" behind past challenges and successes. "There needs to be transparency into what's really working and what's not working, with very open, candid sharing of information across the team," says Navneet Grewal at Airtable.

   Take time to consider the messages and content that are performing the way you intended (i.e. engaging the target audience at the right stage of the funnel), and compare them with the messages and content that aren't performing as planned. These conversations are critical for shaping future campaigns, and they should occur during every planning cycle.

2. **Address the vulnerability in the room**
   Information and data silos often afford security to employees who are the only ones who know what's going on in their corner of the marketing department. In contrast, Navneet says integrated campaign planning must be a team sport. "The comms function provides air cover, content produces thought leadership, campaigns ensures regular touches with buyers, and field marketing creates in-person connections," she says. "It has to be a synchronous process; no one person can be the hero."

3. **Create a top-down moment that fuels employee empowerment**
   "From the start, you need leadership to bring the entire marketing team together to align on priorities," says Navneet. "This was a lesson we learned during our own integrated planning, and it's led to a great development—that we now have executive sponsors for all our campaigns."

   This is also a great opportunity for leadership to encourage employees to identify and solve previously-unspoken problems. As Navneet says: "It's part of a growth mindset, to empower the team to take ownership of their own workflows."

Best practice #1:
Introduce an integrated mindset

The need for shared language

As you embark on cross-functional planning, you'll quickly realize that what one function calls a certain activity or concept is not necessarily the same as what another function calls it. This can cause teams to trip up at the first step: "wait, how do we define a campaign?"

In working to create a single source of truth, start by standardizing taxonomy across marketing and enforcing this shared language via the tools you use daily. At Equinox, Meagan does this by ensuring all the metadata associated with fitness classes are consistent across bases.

"We ensure class metadata can only be entered into Airtable at one location," she says. "If another base needs that specific piece of information, we'll create a look-up field that syncs from the original source, instead of creating another field that people can write into."

Take action:

Introducing an integrated mindset

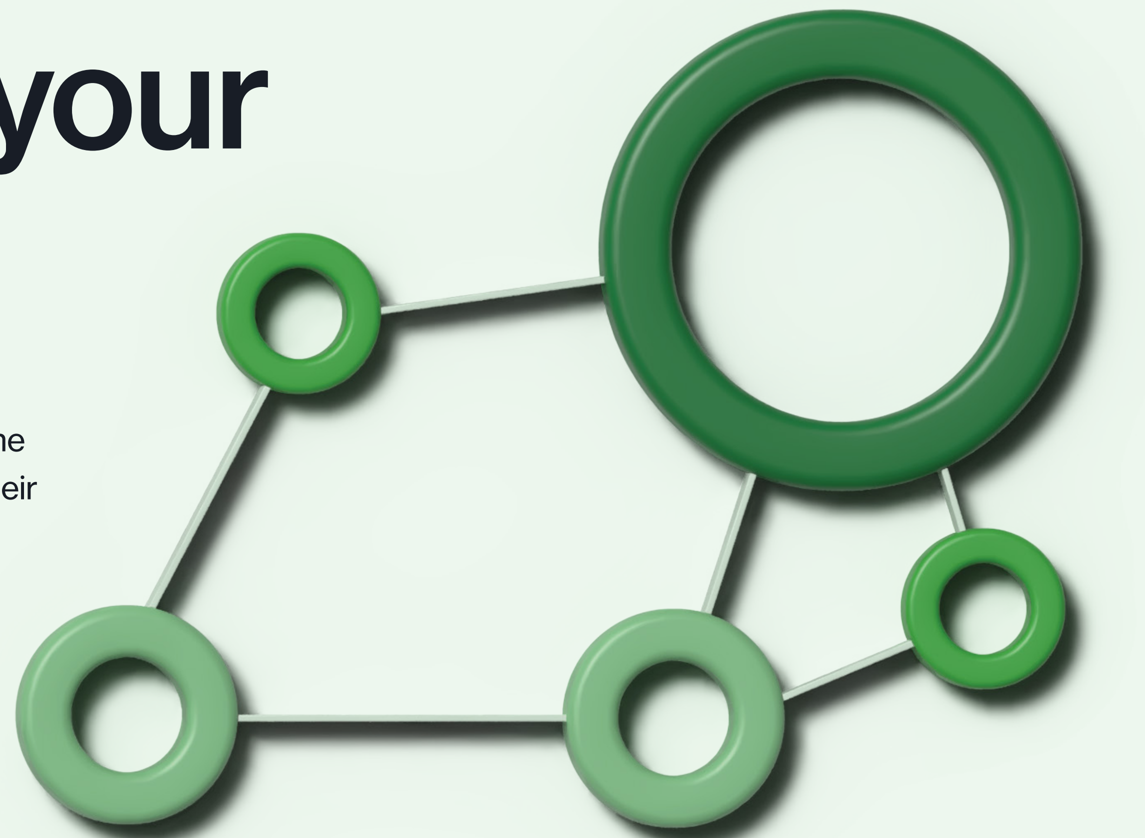
- [ ] Facilitate an open discussion about current processes and past performance.
- [ ] Bring on an executive sponsor to create a "top-down moment."
- [ ] Align on—and document—your shared taxonomy.

Best practice #2

Connect your goals, find your storyline

“For most companies, 75% of their investment is in their people, so where those people spend their time really matters. OKRs encourage people to invest their time against their company’s focal points.”

— Jenny Bodenlos, BlueOcean



Best practice #2: Connect your goals, find your storyline

Now that your team is on board with the idea of integrated campaign planning, it's time to establish the direction of the campaigns and deliverables you're sending to market. These should drive toward clearly defined goals, which ladder up to company objectives and tie together with a unifying theme. Many companies use the OKR (objective and key results) framework to create this connection but, as you've probably experienced, maintaining this alignment between campaign deliverables and company goals is easier said than done.

Ideally, the step-by-step process for setting goals and OKRs looks something like this:

1. The leadership team identifies overall strategic objectives and suggests high-level initiatives to support these goals.
2. Within these initiatives, marketing leaders identify campaigns that target specific audiences with thematic messages.
3. Laddering up to these campaigns are programs, which folks from content, product marketing, and campaigns should shape. Programs specify the different ideas you're sending to market to fuel your campaign.
4. Finally, execution families call for a cross-functional effort: They live within each program and outline exact deliverables and channels for promotion. This way, every single deliverable and promotion tactic clearly rolls up into company-wide objectives.

Best practice #2:
Connect your goals,
find your storyline

How to map campaigns to OKRs

Objectives should convey an end-point or state; present a challenge; and help align leaders across the C-suite.

Initiatives are high-level strategies that define your pathways to achieving your OKRs.

Campaigns are a group of programs that capture your themes and key messages. All campaigns should drive toward specific Key Results (KRs). These KRs quantify “how” you will achieve your objectives; they are measurable outcomes, not activities; and they should be owned by all employees, not just leadership.

Programs constitute the different content ideas, sub-themes, and customer stories that drive your campaign forward. Each program should have components of awareness, demand generation, sales enablement, customer expansion, and market intelligence.

Best practice #2: Connect your goals, find your storyline

What storyline will achieve your goals?

It's one thing to set number-based goals for your campaigns, but it's quite another to translate those goals into a coherent, humanizing strategy that attracts and delights your customers. Themes can help tie collaborative planning together—they also give you an opportunity to contextualize your goals in a creative, inspiring way for the rest of the marketing org. Airbnb's "Belong Anywhere" is a powerful storytelling theme. Nike's "BeTrue" is another strong example.

How can you do this? According to Forbes, a "unifying big idea" should serve three functions:

1. It should be centered on storytelling and serve as your North Star.
2. It should be ambitious and purposeful and aligned with company values.
3. It should inspire a variety of assets and content addressing different audiences and channels. In short, it should help guide every activity and deliverable that comes to life through the campaign.

Adding to this criteria, Navneet suggests a powerful theme should:

4. Be big enough that messaging can speak to different levels of the target audience, for example a chief marketing officer vs a content producer in B2B marketing.
5. Encompass your business's value propositions to prove your differentiation.
6. Incorporate specific 'entry points' that trigger engagement, for example messages hooked upon key customer pain points or pressing market trends.

"If you take a high level objective (e.g. 'drive the best in class lead generation experience for buyers') there is nothing that stops anyone from doing what they want and saying it falls under that umbrella," says Navneet. "Be explicit in saying, 'in order for us to meet our objective, there are three key ideas we want to put into the market'. Now, you have three campaign themes to rally around and it's easier to define your Key Results."

How to connect campaigns to company goals in Airtable

In Airtable, it's easy to link a campaign to a particular objective. You can see the owner, the quarter, and how far along the company is in completing the objective. Watch this webinar to learn how to track your campaigns' contributions to overall company goals.

Watch the webinar

Best practice #2: Connect your goals, find your storyline

How to convince employees to prioritize the work that maps to goals

In most cases, employees welcome the opportunity to prioritize projects that count against company goals. "Nobody wants to waste their time, and it's incredibly fulfilling for individuals to know their work matters," says Jenny at BlueOcean.

You've heard this before. But even with the best intentions, most folks have a tendency to prioritize whatever feels most urgent or easiest to complete. Here are some strategies for overcoming this challenge:

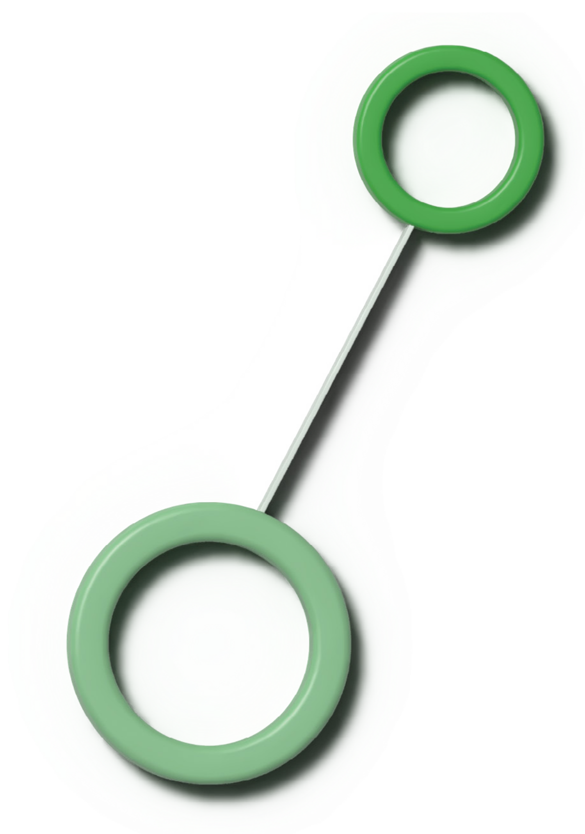
1. **Be selective with airtime**
   Publicly celebrate those who are working in alignment with OKRs: "Intrinsic motivation comes from visibility, and employees want to be acknowledged for their contribution," says Jenny. "When people are pursuing projects in other spaces, and you don't give them the forum to speak to those projects, the projects will most likely fade away."

2. **Dedicate space to sharing new ideas**
   Quashing airtime is one thing, but how do you avoid creating a top-down culture that stifles creativity? "I create space for grassroots innovation, including self-driven areas of interest and intrigue," says Jenny. "I've seen this play out where some of the most successful marketing stories bubbled up from →

Best practice #2:
Connect your goals,
find your storyline

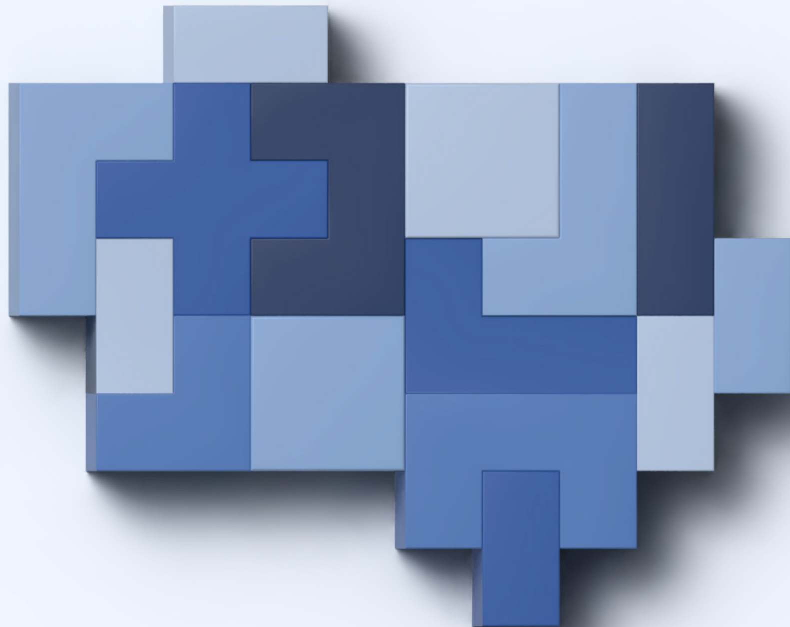
teammates who believed in something and were able to influence the future and create messaging that we hadn't thought of before."

To spark fresh ideas, set up frequent brainstorming meetings and leverage a collaboration tool like Miro. Start these meetings with a prompt—perhaps pulling from your campaign themes or company-wide goals—and give employees time to record their ideas in a shared whiteboarding space. Once all ideas are written down, work together to group the ideas that complement each other, and cast votes for the ones you hope to tackle first. If you use Airtable, you can pull these ideas into a base and organize them with tags and timelines. This allows you to resurface and reexamine budding concepts during each planning cycle. (Read more about how to use Airtable to elevate your brainstorming)



Best practice #3

Build an ‘engine’ for brainstorming and execution



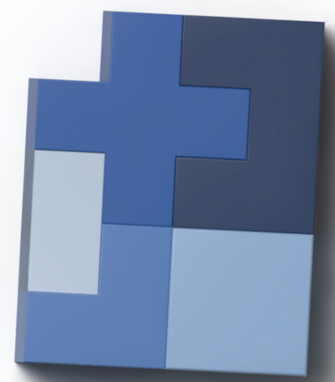
“It doesn’t work when campaign owners just says ‘all right, here’s our go-to-market plan’, and then tells content, customer marketing, social, and paid what they need to do. This is a sign that the campaigns team is planning in a silo and it’s likely that other teams are, too. Campaign planning is a joint effort; marketing should be one team.”

— Navneet Grewal, Airtable

Best practice #3: Build an “engine” for brainstorming and execution

Now you’ve got your goals and campaign themes, it’s time to identify a core team, or ‘engine,’ who is responsible for shaping each campaign and determining deliverables. As Navneet explains: “Different functions within marketing should collaborate to define the most important key messages and the best ways to get these messages to market.”

Jenny adds that moving from campaign themes to specific deliverables involves interrogating key messages: “The first thing we do is ask ourselves questions like ‘what is the elevator pitch?’ or ‘what are the five whys?’ of each theme. These exercises help us ideate the different ways we might tell a story, and give everyone a chance to get their assumptions and considerations out in the open.”



Best practice #3:
Build an “engine”
for brainstorming
and execution

Use a RACI model to clarify roles

Of course, campaign planning that involves multiple stakeholders also brings risk—with too many folks contributing, it becomes difficult to decide on final direction and you can spend weeks, months even, in an ongoing cycle of brainstorming, outlining, reviewing, and then back to brainstorming.

Using a RACI model is an effective way to navigate this; the acronym stands for Responsible, Accountable, Consulted, and Informed (RACI). Assigning team members different letters makes it clear who’s responsible for driving the strategy, and who’s involvement stops and starts at certain points. Typically, the ‘Responsible’ parties are the ‘engine’ who are closest to the work and vision. Depending on how your marketing org is structured, this core team might include team members from campaigns, content, creative, comms, or product marketing. Your marketing org may need to experiment with different configurations for a few cycles before figuring out which stakeholders are needed on different campaigns.

Tip: Use your executive sponsors as “tie breakers” when the Responsible party can’t agree on something. This doesn’t mean execs are involved in every decision, but that they are prepared to navigate the stickier conversations and keep you moving quickly.

A sample timeline for campaign planning

The duration of each stage may vary depending on the size of your organization.

Prior work: Establish marketing OKRs and their connection to company-wide goals. Identify campaign themes to help contextualize those goals. Decide on budget allocation for each campaign.

Week 1: The core team brainstorms thematic storylines. Make time to share qualitative and quantitative feedback on past campaigns, current audience engagement, and gaps in storytelling.

- **Core team:** Campaigns, content, creative, and product marketing
- **Outcome of this work:** Executive sign off on campaign themes and key messages laddering up to those themes. A messaging framework should be underway, along with creative concepting.

Week 2: The core team shares the outcome of the brainstorm with their specific functions, asking for feedback and investigating the most effective ways to bring the campaign to life.

Campaigns should evaluate the ideas through the lens of customer journey, identifying gaps in the funnel, thinking through ways to best reach key audiences, and digging into past performance.

Content should examine opportunities for thought leadership, explore trends happening externally that could strengthen key messages, and think through customer stories and proof points to support.

Product marketing should determine what key messages align best to upcoming product launches, and how they will land in current marketing conditions. They might look into opportunities for engaging analysts, and they should see which messages align with key value propositions.

Creative should begin ideating ways to capture the theme visually and in shorter brand copywriting. Starting this work now will help inspire the rest of the team to help unlock the theme’s potential through the planning process.

Outcome of this work: Feedback from each function on strength of themes, customers to feature, and recommendations on how to send key messages to market. This input will help shape the assets and activities supporting each campaign.

Best practice #3: Build an "engine" for brainstorming and execution

Week 3: The core team comes together to discuss the feedback they received from their specific functions, and to start building a six month framework for each campaign.

Outcome of this work: ~3 key messages for each campaign. And loose abstracts and timing for the "tentpole" assets that will fuel the campaign over the next six months. By this stage, the thematic narrative and messaging framework should be complete.

"Tentpole assets" are sometimes called "pillar" or "big rock" assets. They're typically a large lift, featuring thought leadership and customer voice, and are most likely geared toward lead gen.

Week 4: As a united team, campaigns, content, creative, and product marketing present the proposed key messages and supporting assets to "informed" stakeholders (remember RACI?). This meeting should include leadership.

Next steps from this meeting:

1. Different channel owners should start forming promotional plans, based on the campaign framework. This is a good time to start allocating spend across channels to support the tentpole assets.

2. The core team starts building out a bill of campaign materials that feeds the buyer's journey—you should map these deliverables according to funnel-stage and target audience.

3. Content and creative must commit (or not) to key deliverables and provide a rough timeline for tentpole assets

Week 5: Leadership and RACI stakeholders sign off on strategy, or provide feedback for campaigns, content, and product marketing to implement.

Week 6: Execution planning begins, and campaigns, content, and product marketing start outlining timelines, campaign structure, and workback plans.

Tip: In planning all deliverables (not just pillar assets) always look for chances for work to link to and support other work. For example, you could feature quotes from a product marketing webinar in an ebook on a slightly tangential topic, bringing consistency to messaging and creating horizontal throughlines between assets. (**Hint**: when these plans and timelines live in a single source of truth, it's much easier to make these connections).

Best practice #3: Build an “engine” for brainstorming and execution

Deepening creative’s involvement at Airtable with RACI

As guardians of the Airtable brand, our designers and copywriters needed to weigh in on strategy and direction during campaign planning—but they were often brought in too late to set the scene. To solve this, we added creative to the Consulted list in the RACI model. Bringing our creatives into brainstorming has infused our go-to-market assets with fresh creativity, and including them earlier in the process has helped streamline creative resource allocation overall.

Best practice #4

Create your single source of truth

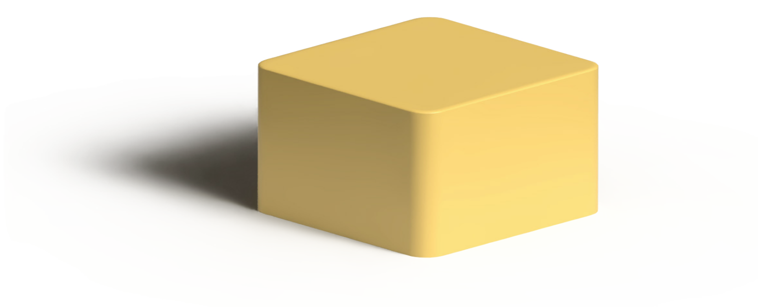
"There is magic that comes from being able to see all your marketing campaigns and activities in one space. It allows you to see the convergence of several different opportunities, and it means you can respond to your customers or your competitors live in the moment."

— Jenny Bodenlos, BlueOcean

Best practice #4: Create your single source of truth

The term "single source of truth" is thrown about a lot in marketing, but the underlying principle—that teams should consolidate information and data to live in one, shared place—is oft-cited for good reason. In a recent survey of more than 300 marketing leaders, we saw a huge spike in performance (meeting deadlines, achieving goals, driving revenue) in teams with fewer sources of truth.

Why? When information isn't stored collectively, your team is forced to spend time reaching out to stakeholders, gathering the correct information, and then figuring out which version is the most accurate or up to date. This makes campaign planning especially painful, as you don't have easy access to past results and you're unsure what work is already underway. Ideally, this information should live at your fingertips, helping you shape future campaigns and ensuring you avoid making the same mistakes twice.



Best practice #4: Create your single source of truth

How reliable is your single source of truth?

A single source of truth connects every stage of the marketing process, including planning, production, delivery and asset management, and measurement.

Good(ish)

- [ ] You consult between 10 and 15 sources to find up to date information on marketing activities
- [ ] 50-59% of your team's work is manual (non-automated tasks, emails, slacks, comments, etc.)
- [ ] Your team's work is spread across more than 20 tools

Better

- [ ] You consult between 5 and 10 sources to find up to date information on marketing activities
- [ ] 20-29% of your team's work is manual (non-automated, emails, slacks, comments, etc.)
- [ ] Your team's work is spread across 10- 19 different tools
- [ ] Your team spends 20% to 29% of the work week on non-core tasks that don't contribute to planned deliverables

Best

- [ ] You consult between 1 and 5 sources to find up to date information on marketing activities
- [ ] Your marketing team uses between 1 and 9 tools on a regular basis
- [ ] Your team spends 10% to 19% on non-core tasks that don't contribute to planned deliverables
- [ ] You spend less than 10 hours in a work week in internal meetings

These checklists were created based on the responses of marketing leaders who reported either 10-14 sources of truth (left column); 5 - 9 sources of truth (middle column); or fewer than 5 sources of truth (right column). Source: Marketing trends report.

Best practice #4: Create your single source of truth

At Equinox, a global tracker keeps publishing on track

As publishing manager at Equinox Media, Meagan is revolutionizing the way the team publishes content to Equinox+, an app for at-home fitness enthusiasts. She uses their global tracker as a single source of truth—a holistic repository of up–to-date information that helps the team make decisions about upcoming content and classes.

"Everything flows up to our global tracker and that's where you can see all the information for upcoming classes," says Meagan. "Our metadata includes class type, skill level, class length, different body focuses, and equipment. Having this information side by side helps our team make decisions quickly. At a glance, we can see if we're releasing two advanced level classes in one week, for example. We don't want to do that, so we'll update the schedule."

The global tracker is also a destination for the rest of the org to see what's next, preventing the back-and-forth that so often happens in Slack or via email: "Right now, we have our calendar planned out months in advance. If anyone wants to know what we're publishing next, they know where to go," Meagan says.

Best practice #4:
Create your single
source of truth

How do you maintain the integrity of a single source of truth?

Meagan uses Airtable to ensure there's only one place to enter and edit information, even if that data appears in multiple places. "If we want to assign a class a live date, we can only do it in one place—the upload schedule table. Using look-up fields, this live date is added to other tables within the brand base, including the metadata table which syncs to our global tacker. Even though the information can appear in different bases, it can only be edited in one field in one table in one base," she says.

Plus, Meagan is strict with editing permissions, ensuring only a handful of people can edit the configuration of the base—"those who actually know how everything is connected, where everything lives, and where everything should live."

Take action:

Create your single source of truth

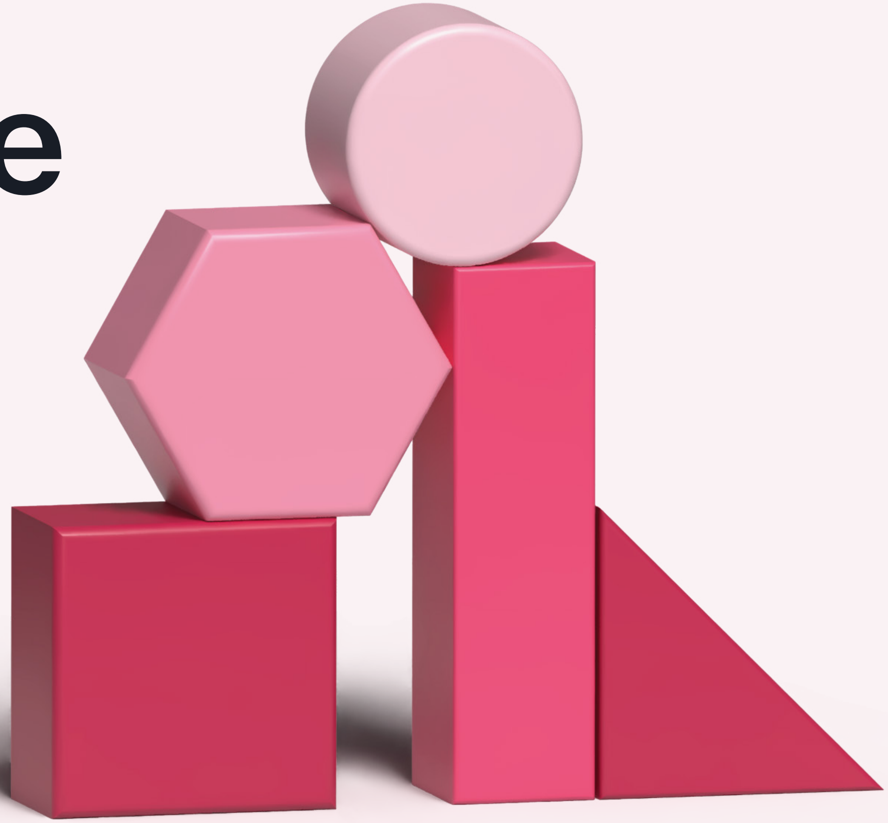
- [ ] Locate all the places where data and information is stored across the team
- [ ] Find commonalities within the data so you can start matching and merging taxonomies; this becomes your shared metadata
- [ ] Pull all the information into one centralized hub

Best practice #5

Identify right place, right time for input

“Views make it very easy to respond to requests. For example, I can create views that show classes of a certain theme, classes that were shot at one location, or classes from specific brands.”

— Meagan Nelson, Equinox



Best practice #5:
Identify right place, right time for input

The nature of integrated campaign planning means there is so much information pulled into plans—whether it's insights from product marketing, budget details from performance marketing, speaking opportunities from content and comms, or brand guidelines from creative teams.

No matter how useful, this input becomes a mountain of information—Airtable customers use phrases like "the base of all bases," "master tracker," or "the marketing hub" to describe their repository for storing data and tracking work. One thing is certain: these databases become a lot to share with stakeholders who aren't involved in the day-to-day.

Best practice #5: Identify right place, right time for input

Making data more digestible

Meagan solves this problem by building views in Airtable for different stakeholders—showing the information they need, without the information they don't. "Whenever our head of content has quarterly meetings with the CEO, they'll want to see how many live and on-demand classes were published in the last quarter, and how many were published and then taken down. So I filter that information into a view for reporting," she says. Views update automatically when data in the global tracker is updated, meaning there's no duplicated or outdated data living in different places.

The ability to create different views allows Meagan to work more collaboratively, too. For example, she uses views to facilitate collaboration between the personal training team who creates new moves, and the product team who ensures the moves show properly on the apps.

"We've built views in Airtable to help track the quality assurance (QA) process of individual fitness moves that are used in goal-based fitness programs," says Meagan. "This helps us keep track of which moves are approved and ready to be included in these programs. It's saving us a lot of time."

Best practice #6

Give others an avenue for requests

“There was a lot of playing catch-up—we would have to read emails back and forth between team members to properly understand the request, and this took up a lot of time.”

— Nicole Dahl, Taylor Guitars

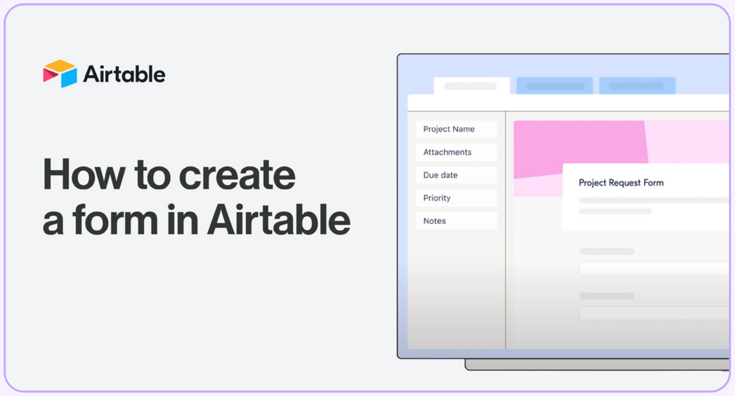
Best practice #6: Give others an avenue for requests

Between new designs, iterations of classics, and custom guitars for well-known artists, Taylor Guitars releases 130,000 guitars each year and distributes these in more than 60 countries. As a marketing project manager, Nicole is responsible for managing campaign timelines and focusing her team on planned deliverables. But, without a ticketing system for managing requests, Nicole found the team was easily pulled into one-off tasks. “One of the primary things I wanted was a form where everyone could submit their requests, receive project identification numbers, and all requests would be trafficked through the project managers,” she says.

How to create forms in Airtable

In Airtable, you can create forms with many different field types to ensure you receive the information you need within every request. See how to use conditional fields to change the information input for different stakeholders or content types.

Watch the webinar



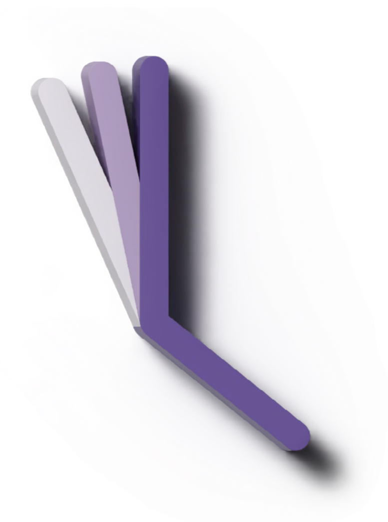
Best practice #6:
Give others an avenue for requests

Focusing the team on what they do best at Taylor Guitars

To solve this, Nicole streamlined marketing requests with Airtable forms. Now, if someone wants an asset created for a specific guitar model, they fill out a form and the information automatically populates the marketing team's Airtable base, where they track work and share information.

To further improve the process, Nicole uses automations to eliminate the back-and-forth in communication. For example, the requester receives an automation to let them know their task has been assigned and, when the task is complete, another automation sends them a link to the finished product.

This not only saves time by reducing emails, but it also improves visibility over ownership and bolsters the team's output. "Airtable saves us four to five hours a week that we would otherwise spend tracking down things that lived in different places. Now, we get to spend more time on the creative output. We're putting out better work because we have more time to do it," says Nicole.



Best practice #6: Give others an avenue for requests

Make your processes more impactful

Here're some ways you can double down on processes for far-reaching results.

Use forms to reiterate OKRs

When you build your request form, include questions that reinforce your campaign themes or OKRs. For example, you could ask requestors “what objective does this roll into?” or “what goal does this help drive?” This not only helps your stakeholders understand your focus as a marketing department, but also helps you say yes or no depending on priorities.

Start building the muscle of automation

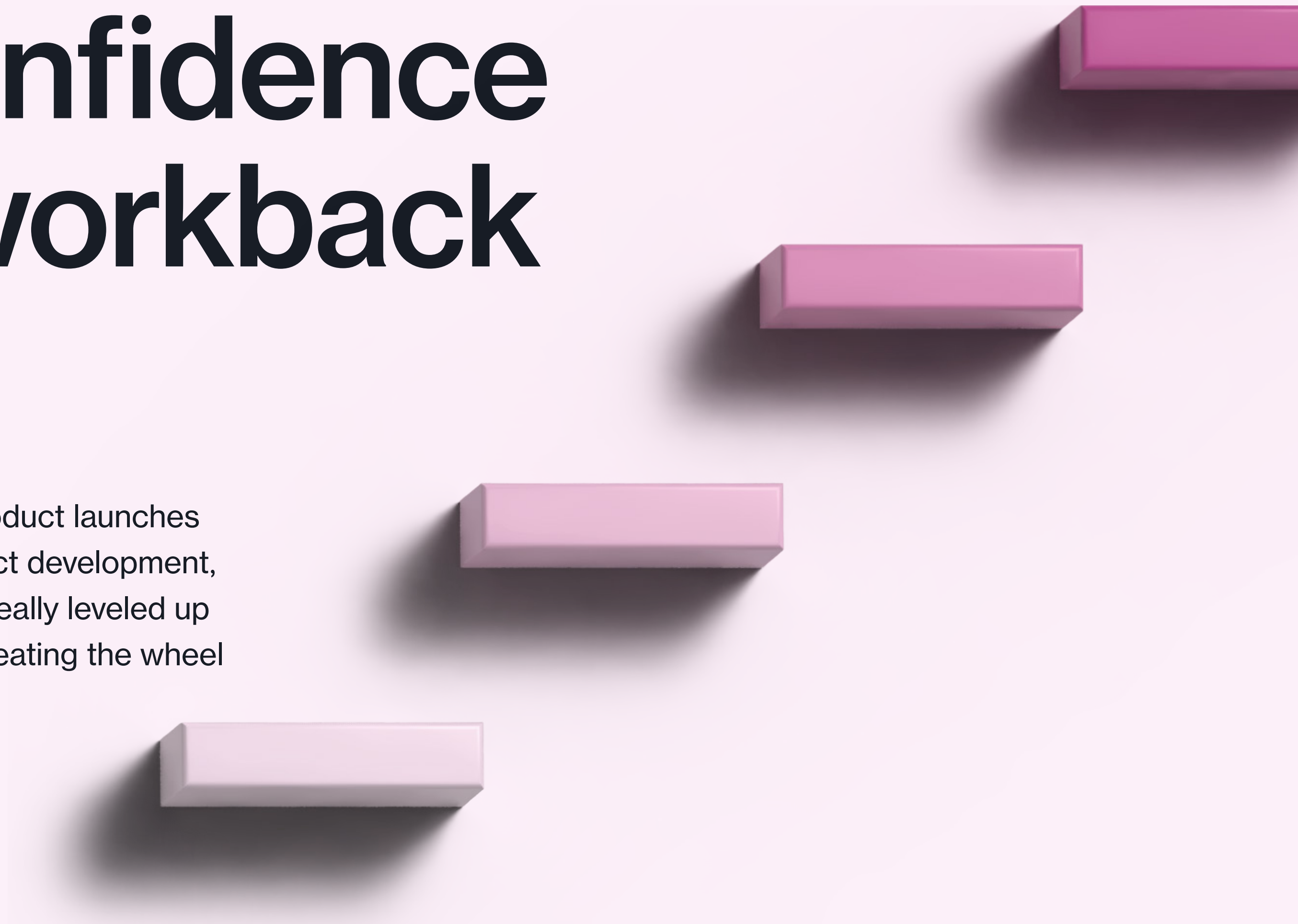
By automating the communication associated with requests, Nicole saves her team four to five hours each week. But this isn't the only area for potential automation. To identify areas for automation, start by looking at the manual tasks your team does repeatedly, whether that's sending follow up emails, notifying stakeholders when reviews are complete, or updating publish dates across different sources of information. These are all areas for potential automation.

If your team is frequently doing these things, that's a sign it's time to start automating:

- [ ] Copying and pasting information
- [ ] Pulling information from multiple sources
- [ ] Sending the same messages via Slack and email
- [ ] Manually changing the dates on every deliverable
- [ ] Clarifying (and re-clarifying) next steps

Best practice #7

Grow confidence in your workback plans



"Being able to create templates for product launches means every task in marketing, product development, and sales is clearly laid out. This has really leveled up our launches and keeps me from recreating the wheel every time."

— Nicole Dahl, Taylor Guitars

Best practice #7: Grow confidence in your workback plans

One of the biggest challenges in campaign planning is accurately predicting timelines, especially when multiple stakeholders are involved. Getting this right becomes even more critical when your team is supporting a big company moment—for example, a product launch.

To prepare for a product launch at Taylor Guitars, Nicole uses templates to outline every repeatable step of the process and the associated timelines. This brings a sense of security—the team trusts they're not missing anything critical in the lead up to a guitar release—and allows the marketing team to better define workback plans and predict timelines during planning.

"Working with a warehouse and a fully functioning factory is a wildly unique experience because we're not only a marketing team, we're also a product development company," says Nicole. "Creating templates to ensure we hit the same deliverables for every product launch means we never forget something super vital and then have to backtrack to make the launch happen. Now, we're starting from a place of certainty; that's been a huge improvement for our team."

Best practice #7: Grow confidence in your workback plans

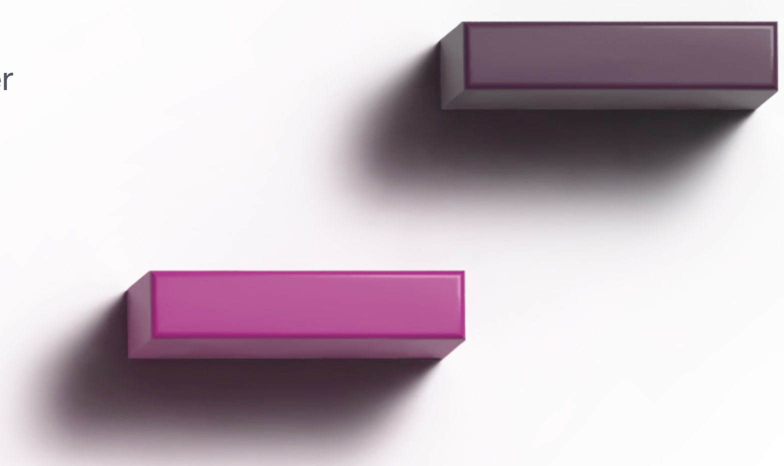
Start with templates for customer-facing assets

According to Jenny at BlueOcean, customer-facing deliverables are the most cross-functional, and these are the assets where you need templated and repeatable processes for every motion. She uses Airtable to keep her team aligned.

"You have to line up activities from every different function to make sure they happen in the right sequence, and that they happen at the right time. You've also got to clarify what tasks can happen simultaneously, and what tasks are reliant on dependencies," says Jenny.

For example, cross-functional feedback on an asset can happen all at once, but copy should be tagged "complete" or "final" before a designer begins their work.

"Without a cross-functional workback plan, what happens is that something that could have been predicted, and could have been planned for, appears as a last minute fire drill that everyone has to rally against," says Jenny. "And they will rally, but it's not repeatable at scale and it's just a recipe for burnout."



Best practice #7:
Grow confidence in
your workback plans

An example for an ebook template

To help visualize the process from planning to launch, here is an example of an ebook production template we use at Airtable.

This process may look different to the way you deliver assets at your organization but, to create something similar, talk to the different "responsible" parties and map out every line item involved in production. As a starting point, explore Airtable templates for project tracking and content production.

The aim is to build repeatable processes that allow your team to spend more time on the asset itself, rather than figuring out what's next in the process.

Best practice #7: Grow confidence in your workback plans

1. Brief & scope

- Complete content brief with goals, target audience, CTAs, and abstract.
- Host production kick off with RACI stakeholders
- Request customer marketing involvement
- Confirm scope of creative requests
- Confirm customer and experts to interview and feature

2. Interview & write

- Interview customers and subject matter experts
- Share content outline with RACI stakeholders and ask for feedback
- Approve quotes with featured experts
- Share full ebook draft with RACI team and executive sponsor for feedback
- Deliver final ebook draft to copyeditor for subediting
- Draft assoc. landing page copy and email copy
- Finalize ebook and handoff to creative

3. Design & create

- Design ebook cover and content
- Design imagery for landing page
- Design imagery for blog and organic social
- Design and write copy for paid ads and email banners
- Review and edit landing page copy and email copy
- Deliver creative assets to RACI stakeholders for feedback
- Implement feedback from stakeholders on ebook draft
- Deliver ebook and supporting assets in PDF format

4. Launch & enable

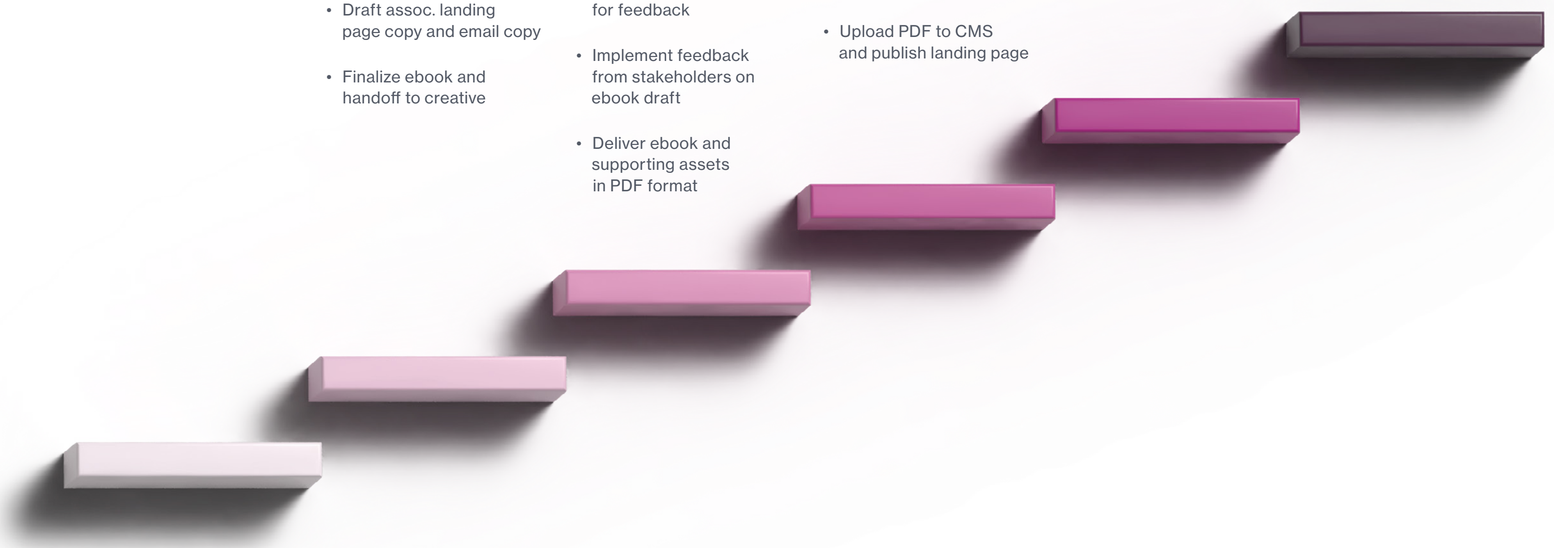
- Run final asset by executive sponsor, as needed
- Create sales enablement messaging and outreach sequences
- Present ebook to sales and customer-facing teams
- Add UTM tracking to links within the PDF
- Create campaign tracking in Salesforce and Marketo
- Upload PDF to CMS and publish landing page

5. Promote & distribute

- Launch organic social campaign
- Launch paid campaigns across all channels
- Send first email to target database
- Publish supporting blog post and re-promote on organic social
- Send follow-up email to target database
- Include ebook in internal and external newsletters

6. Manage & measure

- Add ebook to Data Asset Management (DAM)
- Measure and report on performance at 30, 60, 90 days
- Gather feedback from Sales on ebook resonance with prospects
- Host retrospective to improve process and performance next time

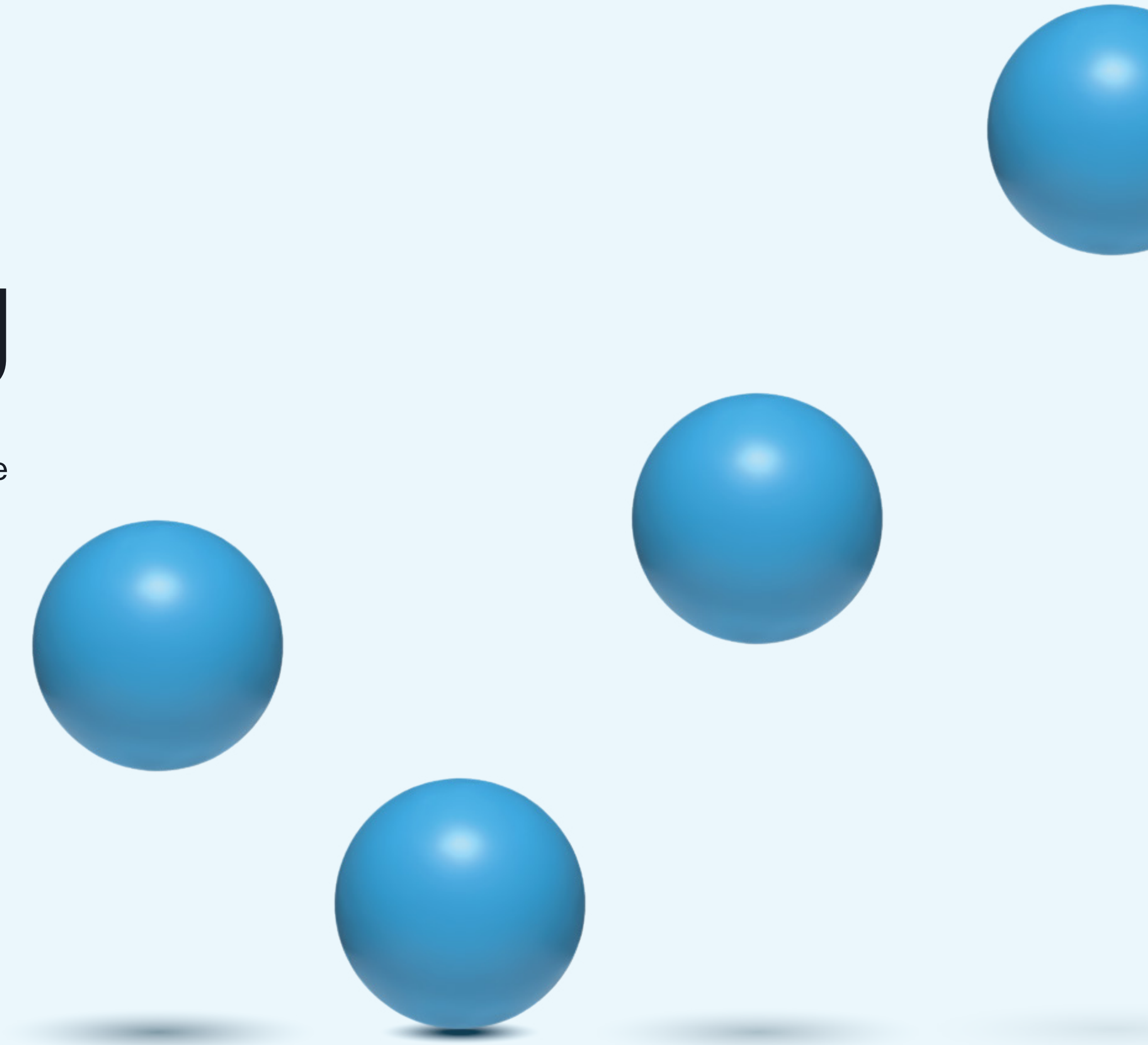


Best practice #8

Find your rhythm of reporting

"We look at each class's starts, completions, average completion rate, and overall rating, and we compare these metrics to the averages of similar classes."

— Meagan Nelson, Equinox



Best practice #8: Find your rhythm of reporting

By this stage in the planning process, you should have:

- [ ] Shared taxonomy across the marketing org
- [ ] Shared goals set for the quarter of the half (i.e. who are the audiences we are focused on, and how will we capture demand from them)
- [ ] Theme-driven campaigns laddering up to these goals
- [ ] A request form established to centralize requests to help aid in prioritization
- [ ] A single, flexible source of truth for aggregating / tracking shared information
- [ ] Specified views for specific stakeholders so teams can work their way without falling back into silos
- [ ] Workback plans based on asset templates and timelines
- [ ] Well-defined strategies on how to efficiently distribute assets across multiple channels, regions, etc.

Now it's time to plan how you're going to track the performance of your campaigns to inform the next planning cycle.

Establish benchmarks for success

Laddering up to your marketing objectives, you have Key Results (KRs) that quantify 'how' you will achieve your goals. These serve as success benchmarks for your campaigns, and they might include targets for content performance, conversion rates, social engagement, or the quantity or reach of individual assets.

Establishing your KRs involves looking at past performance and setting growth goals based on those numbers. As well as evaluating your own data, you might also reference competitor performance or industry averages. Your monthly, quarterly, and yearly KRs should be challenging, but achievable. Most importantly, these targets must be measurable.

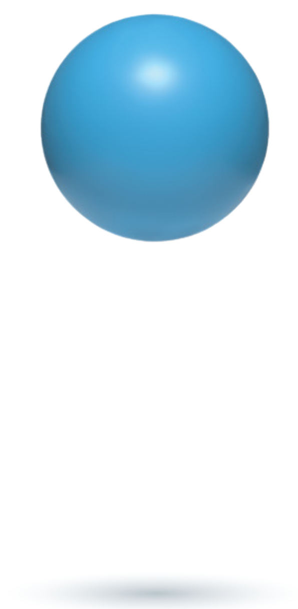
Best practice #8:
Find your rhythm
of reporting

How often are you tracking metrics?

Before you begin executing your plans, you'll need to standardize how often you're going to check on campaign performance and report on KRs. At Airtable, we set up a cadence of weekly check-ins on certain "pulse" metrics, and monthly and quarterly check-ins for KRs and overarching objectives.

You might look at:

1. Weekly pageviews and engagement metrics on your website
2. Monthly activation metrics like sign-ins, time spent in your product, or usage of key features
3. Monthly sign-ups or lead generation
4. Quarterly contribution to overall sales or pipeline



Best practice #8:
Find your rhythm
of reporting

Informing your next planning cycle

Tracking your progress against predetermined benchmarks helps you understand what tactics are working, and what strategies are falling flat. These insights should fuel your decision making during the next planning cycle.

“At the start of planning, we’ll look at content from the past season and rank it according to completion,” Meagan says. “For example, if we have 10 running classes and 5 walking classes, I want to see that the proportion of ‘completes’ matches the number of classes available. Once we have those rankings, we can ask if we need to change the number or types of classes.”

You might compare the performance of different content types (ebooks vs webinars); the reach of various social strategies; the impact of different messaging on target audiences; or the ways some web design updates help drive conversions, while others lead to drop offs. Such analysis is only possible if you’re measuring and tracking performance on a regular basis.

Take action:

Find your reporting rhythm

- [ ] Define the function-specific outcomes that are necessary for achieving your marketing goals, ensure these outcomes are quantifiable
- [ ] Define benchmarks for success for each metric, and assign specific KRs to each marketing function
- [ ] Establish a frequent cadence of reporting, allowing you to check in weekly, monthly, and quarterly to keep your team moving in the right direction.

Conclusion

Whether you're wrangling a large marketing team, or you're growing your team from scratch, honing the campaign planning process helps amplify and elevate every aspect of your marketing strategy. When the planning process is collaborative, it's easy to identify opportunities for work to power other work; and the result is far greater than the sum of its parts.

But for this magic to happen, the foundational work must come first. Creating a shared language, establishing a single source of truth, changing the team's mindset aren't easy to accomplish. And they don't even touch the nitty gritty of creating workback plans, managing requests, and setting benchmarks. All of these best practices bring unique challenges and present a (sometimes steep) learning curve to working together differently, planning as one.

And yet, the results speak for themselves. Yes, integrated campaigns more effectively drive revenue and consistently outperform ad hoc marketing strategies. But they also transform the workplace into one of proactive collaboration, comradery, and the thrill of sharing results and creating impact. By taking these first steps, you won't just change the way you approach campaign planning, you will change the way your marketing org shows up each day.

About Airtable

Airtable enables teams to build workflows that modernize their business processes. More than 300,000 organizations, including more than half of the Fortune 1000, use Airtable's visual, flexible tools to customize workflows that meet their exact needs, whether they're creating blockbuster movies, designing running shoes, distributing life-saving vaccines, or anything in between.

Learn more

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