

NORWEST

How to Ace Your Marketing Board Deck

This Session Is Being Recorded And Slides Will Be Provided Following The Webinar.

27 November 2023



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 series and a connected network to help save them time and money.



KATIE BELDING
*Partner,
Portfolio Services*

NORWEST



Talent & Retention

Build and retain a killer team



People Advisory

Build your organization strategically



Business Development

Connect with the right people



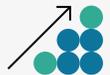
PR & Marketing

Promote and grow your brand



Operations Strategy

Navigate the legal, financial, and real estate waters



Corporate Development

Strategic guidance as you scale your business



Community

Norwest Events & CEO Impact Initiatives

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?



Why Do We Sometimes Dread Board Meetings?



A lot of work

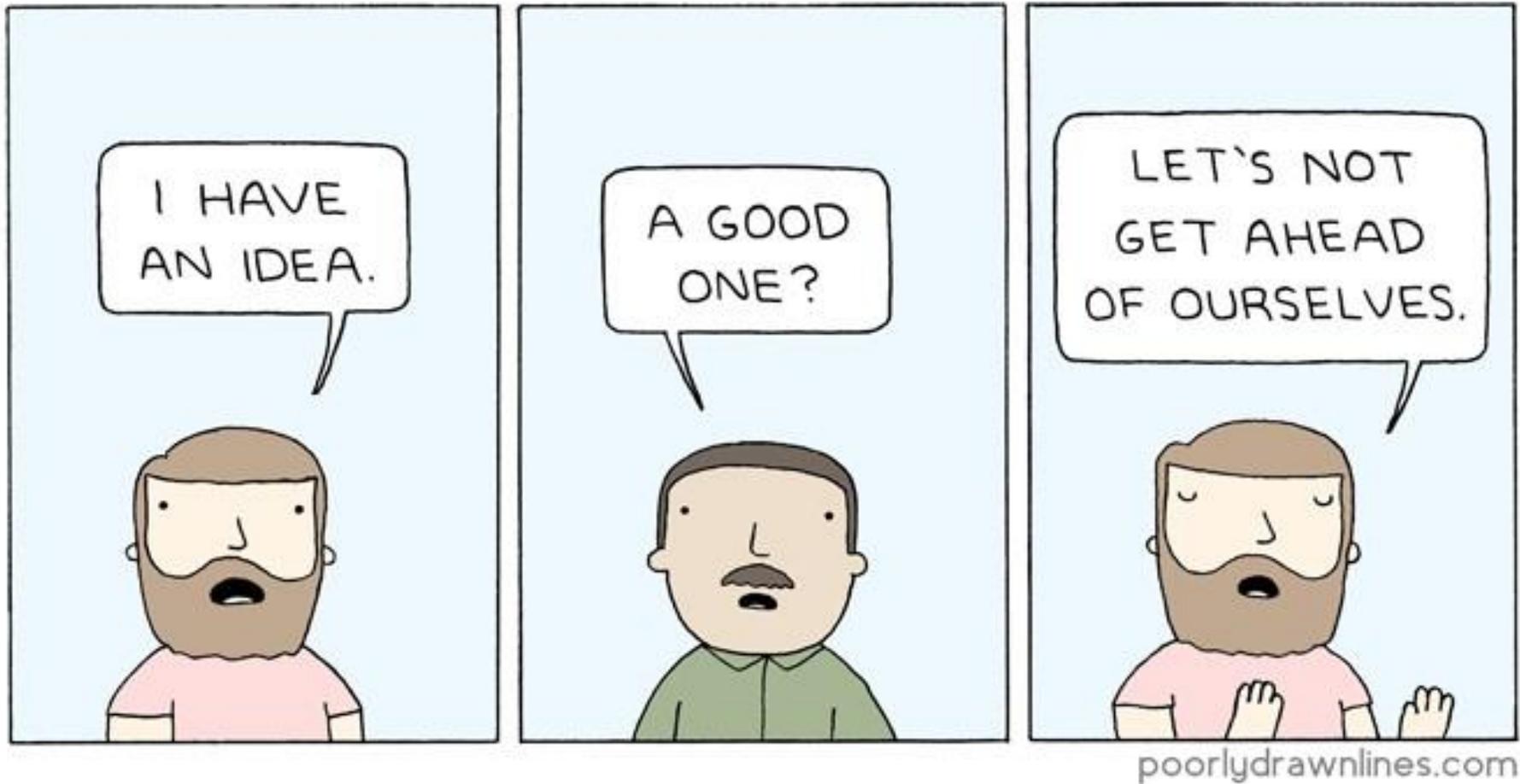


Uncertainty



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

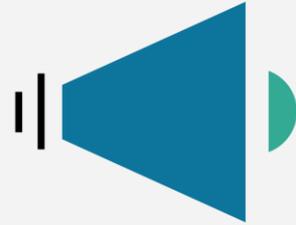


Gaining The Board's Confidence

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'S
THE PLAN?!**

What are the drivers
of growth or underperformance?

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

What are competitors doing
better than we are?

What are the opportunities for
improvement/risks?

NORWEST

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!



Original

BURNING

QUESTION



Recommended on
brand option

Burning Questions



No Questions off Limits- You're Among Friends!

Ask me anything



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



NORWEST

Thank You

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

NORWEST



Bonus Material



Pro Tips – Things To Avoid In Your Deck

01

Lots of data without context – i.e. no QoQ or YoY comparisons; no baseline to know if the results are good or bad.

02

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.

03

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).

04

Diving too deep into the weeds and losing sight of more uber, strategic directions – not getting to the "why". (Mentioned earlier as "zoom out").

05

Upstream/vanity metrics such as email opens/clicks, advertising impressions and clicks, landing page performance, MELs/responders, etc, unless you've discovered something ground breaking in which case you can include it in the "Key Learnings" slide.

06

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)

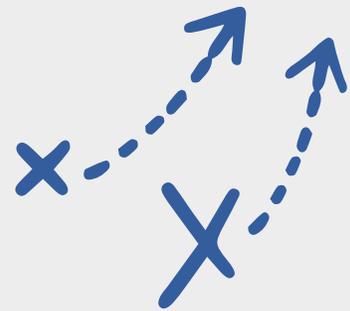
The Kitchen Sink – B2B Metrics (Cont.)

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 Opps	Responders to Opps	Sourced Opps Won	Sources 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%