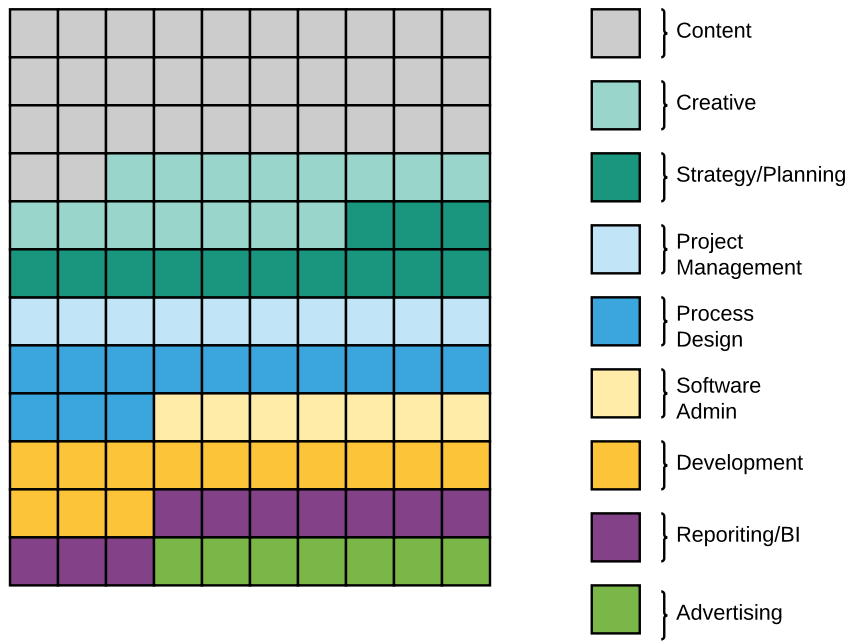




The following areas of marketing expertise every team requires. The categories on this page are used in the card-sorting activity.

Content	Ad Copy	Website	Blog	Whitepaper/Case Study	Webinar/Seminar
Creative	Email	Landing Page	Graphics/InfoGraphics	Website Design	
Strategy/Planning	Persona Development	Campaign Planning	GAP Analysis	Metrics/Reporting Analysis	Marketing Calendar
Project Management	Project Management for all Marketing Initiatives and Platforms				
Process Development	Deliverability	Lead Scoring	SQL Process (Initial Consult etc.)	Contact Management	Automated Programs
Software Admin	List Management	Email Sends	CRM Process Management	Deliverability Management	
Development	Javascript	API	Website Coding	HTML	
Reporting/BI	Automated Report Development	One-time Custom Report	Scripting	CRM/Dashboard Reporting	
Advertising	PPC	Social Ads	Search Ads	Tradeshows/Events	



The purpose of this tool is to help visualize what areas of marketing expertise are currently lacking and require re-assignment, recruitment, or outsourcing.

The goal is to not simply have everything bucketed, but to ensure that proper subject expertise is applied.

Using the categories provided, assign the responsibility for each core marketing element to the appropriate resource on your team.

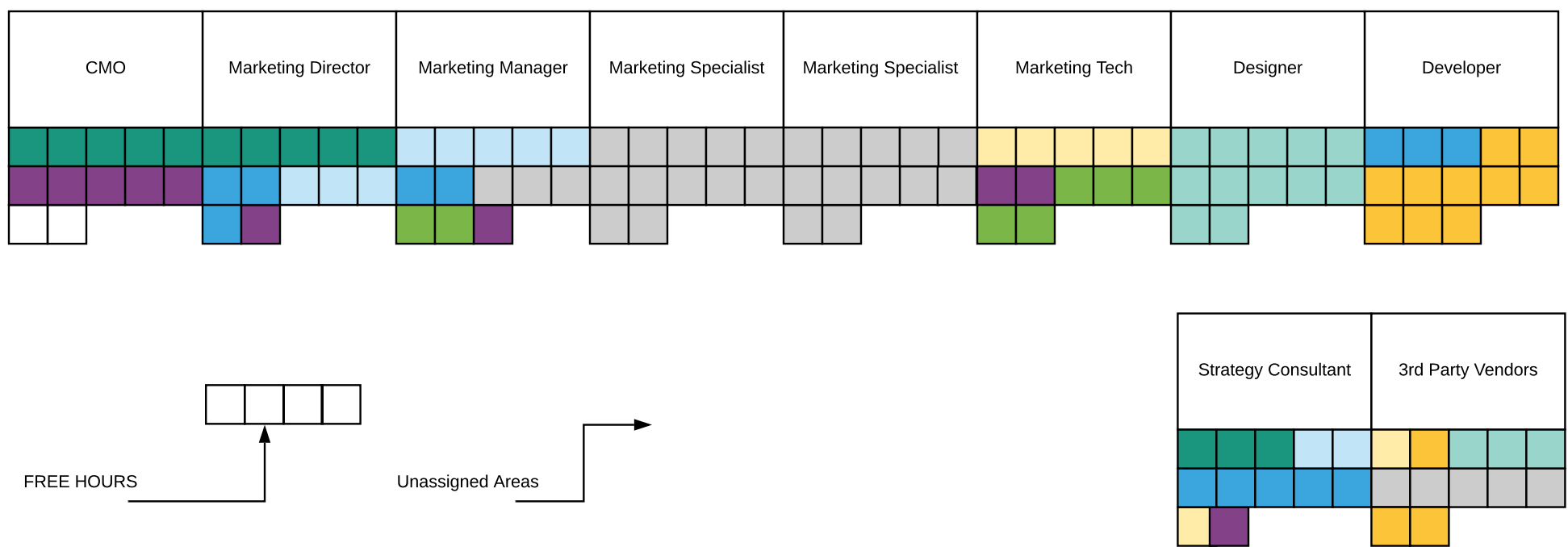
After making assignments compare how many areas of expertise each resource is required to have, which elements are left un-covered, and how involving contracted experts can alleviate the gaps.

No internal resources should have more than 3 colors assigned to ensure expertise is available and excellence can be maintained.

For assistance in evaluation and marketing expertise in strategy, process design, and content development please contact me at sarah@breakglassconsulting.com

This exercise does not include capacity planning as it is designed for marketing teams of any size. For complete visibility, the categories can be revised and cards re-assigned based on appropriate weight for your organization.

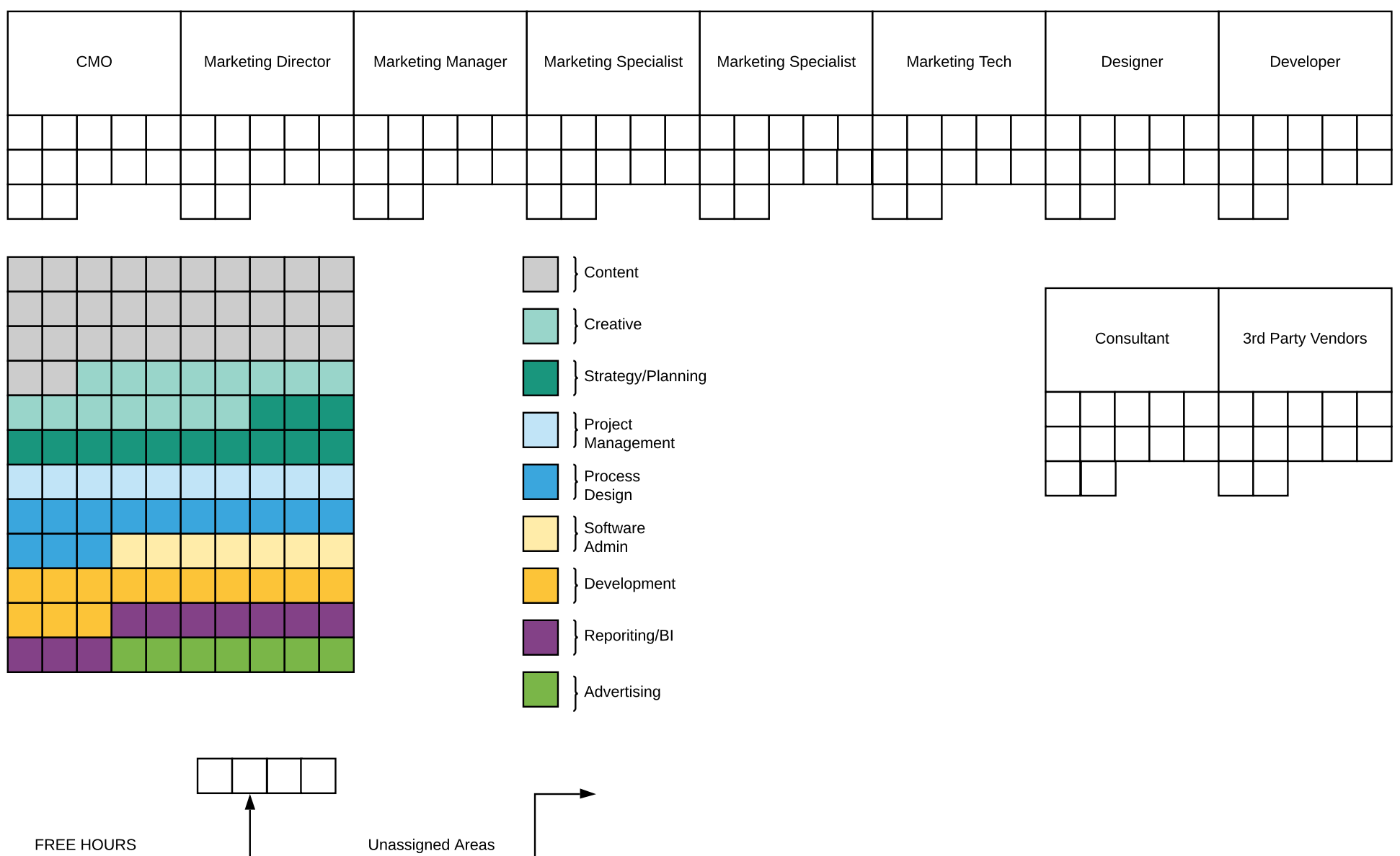
Example 1: For Example, on a team of 8 with two current external resources the breakdown of responsibility may look as follows:



FREE HOURS

Unassigned Areas

Work Sheet: Here is a blank version, try it for yourself and see what your current division of initiatives looks like and what is being left undone or done by the wrong resource.



FREE HOURS

Unassigned Areas