



# CK's Epiphanies

Inspirations & revelations from  
the mind of a marketer.



## roles: How Many Roles Are You Playing?

A depiction of 8 roles marketers perform

(Part 2 of a 2-Part Series)

In our last edition we learned that a marketer's job is really a series of roles. And that success doesn't always hinge on mastering one's principal role, but managing all roles.

In this edition we conclude our 2-part Series on the diverse roles that marketers perform (if you missed Part 1 of the series, it's available at [www.ckEpiphany.com](http://www.ckEpiphany.com)). Through the series we're identifying and depicting 8 key roles that marketers perform.

The 4 strategic roles we reviewed last issue of Researcher, Goal-Setter, Strategist and Planner are integral in devising goals and plans. The 4 tactical roles we'll discuss in this issue are imperative in developing plans and programs.

### Introducing the epiphany:

**Comprising a plan requires strategic roles.  
Realizing a plan requires tactical roles.**

Since a plan is only as good as its execution, we'll depict the roles and responsibilities necessary for plan development, namely:

**Promoter; Manager; Tracker and Optimizer.**

### **Role #5: Promoter: Getting buy-in from inside.**

Promotion begins well before products hit the market. Marketers promote programs initially to management and ultimately to prospects.

### **In a promotional role, marketers are tasked with:**

- Getting approval: In order for a program to get-off the ground, it needs to get past the boardroom. Marketers must provide compelling reasons, supporting data and sound projections to garner program approval.
- Gaining support: Marketers need to ensure that every customer "touch-point" (e.g. sales, service, support) is on-board and up-to-speed. That means educating employees on program goals and tactics is a core component of the marketer's job.

### Illuminating Questions:

How good are you at performing the tactical roles of marketing?

Take a moment and answer:

- Do you promote your programs inside the organization before promoting them to prospects?
- Are you providing your team with clear direction and concise schedules at the outset of initiatives?
- Do you secure a "Plan B" in case of marketing mishaps?
- Are you employing the necessary tracking tools and systems to assess post-promotional data?
- Are you optimizing all program components before concluding the program is ineffective?
- Do you document and debrief those "lessons learned" with your team and managers after a program has transpired?

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- Generating enthusiasm: It's not enough to communicate, the marketer must motivate. Before a marketer can get buy-in from customers, they need to get it from employees.

### **Role #6: Manager: Managing the method...and the madness!**

Whether it's managing ideas, programs or people, a good marketer is a good manager.

#### **In a managerial role, marketers are responsible for:**

- Creating project schedules: Successful programs are supported by clear and concise project schedules. The marketer produces schedules replete with timetables, activities, resources, responsibilities and budgets.
- Managing resources: Be they in-house staff, partners, vendors or a cross-section of all these groups, a marketer acts as the project manager responsible for delegating individual tasks and evaluating overall performance.
- Securing the proverbial "Plan B": Many times projects go awry; it's the nature of managing plans, programs and people. It's up to the marketer to secure the proper support to keep the plan on-track and on-budget. Good marketers plan ahead plan for such events; thereby preventing conflicts from becoming catastrophes.

### **Role #7: Tracker: Realizing Return-On-Investment.**

Tracking is instituted to measure program returns and provide intelligence for future initiatives.

#### **In a tracking role, marketers are accountable for:**

- Determining benchmarks: Different programs provide different criteria for the marketer to measure. The first step in tracking is determining the relative factors to assess (e.g. sales, customer acquisition, customer retention).
- Employing tracking systems: Marketers are tasked with employing the tools and systems for collecting results (e.g. surveys, sales data, coupon redemption rates).
- Assessing results: Once the data is in, the marketer evaluates the success or failure of initiatives.

### **Role #8: Optimizer: If at first you don't succeed...Optimize!**

While some programs will undoubtedly fare better than others, a marketer must discern the difference between an unsuccessful program and unsuccessful program elements.

#### **In an optimizer role, marketers are responsible for:**

- Detecting ineffective elements: Whether it's the wrong trade journal used to reach the desired audience, a headline that flops with prospects or a discount that's not deep enough to evoke product purchases, the marketer's job is to detect the factors that deem the program unproductive.
- Refining the program: The marketer's focus then shifts to re-tooling and refining the ineffective components to produce a successful re-launch of the program.
- Documenting "lessons learned": Once the program has achieved a return, the marketer documents the tips and techniques that facilitated the program's success. These lessons provide valuable know-how for future endeavors.

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A marketer's mission is identifying opportunities, developing strategies and plans and evaluating returns. These tasks require the marketer to perform various roles in order to fulfill that mission. Some of the roles are strategic, others roles are tactical. All roles are essential in the marketing process.

### **Bringing us full-circle to the epiphany:**

**All roles are created equal.**

Next edition we'll explore messaging epiphanies. Hope you'll join us. ■

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## **who is CK?**

CK is Christina Kerley.

Since '91, Christina has been identifying and developing marketing epiphanies for up and coming Start-Ups and formidable Fortune 500s. Passionate about working on extraordinary projects and providing exemplary service, she formed ckEpiphany in '99.

Strengthening marketing efforts one epiphany at a time, the business develops client strategies, plans and programs. For more information on CK and ckEpiphany, please visit: [www.ckEpiphany.com](http://www.ckEpiphany.com)

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