

THE BUSINESS LEADERS PLAYBOOK FOR **MARKETING**

A comprehensive guide for business leaders to build, manage and optimise their marketing function for sustainable growth.

Presented by Leadership Services

www.leadership-services.co.uk

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Chapter 1: Introduction - Why Marketing Leadership Matters

Marketing is the engine that drives business growth. Yet many small and medium-sized businesses operate without senior marketing leadership, relying on junior team members or external agencies to make critical strategic decisions. This playbook is designed to give business leaders the tools and frameworks needed to build, manage and optimise a marketing function that delivers measurable results.

Without strategic marketing leadership, businesses commonly face fragmented brand messaging, wasted advertising spend, missed market opportunities, and an inability to measure what is actually working. A structured approach to marketing leadership can transform these challenges into competitive advantages.

The Cost of Poor Marketing Leadership

Impact Area	Without Leadership	With Leadership
Brand Consistency	Fragmented messaging across channels	Unified brand voice and visual identity
Budget Efficiency	Up to 40% wasted on ineffective channels	Data-driven allocation with clear ROI tracking
Lead Generation	Sporadic and unpredictable results	Systematic pipeline with forecasting capability
Team Performance	Reactive, task-focused activity	Strategic, goal-oriented campaigns
Market Position	Unclear differentiation	Clear positioning and competitive advantage

 *Leadership Tip: If you cannot clearly articulate your marketing strategy in two sentences, your team and customers cannot either. Clarity drives results.*

Chapter 2: Understanding Your Market Position

Before you can market effectively, you need to understand where you sit in your market. Market positioning is the foundation upon which all marketing activity is built. Without it, you are spending money without direction.

Competitive Analysis Framework

Use the following framework to map your competitive landscape and identify opportunities for differentiation.

Competitor	Target Market	Key Strengths	Key Weaknesses	Pricing Model	Market Share Est.
Competitor A					
Competitor B					
Competitor C					
Your Business					

SWOT Analysis for Marketing

Strengths	Weaknesses
List internal marketing strengths	List internal marketing weaknesses
e.g. Strong brand recognition	e.g. No email marketing capability
e.g. Loyal customer base	e.g. Limited digital presence

Opportunities	Threats
List external opportunities	List external threats
e.g. Growing market segment	e.g. New competitor entering market

e.g. Underserved customer need	e.g. Changing regulations
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 *Leadership Tip: Review your competitive analysis quarterly. Markets shift faster than most businesses realise, and last years positioning may no longer be relevant.*

Chapter 3: Building Your Marketing Strategy

A marketing strategy is not a list of tactics. It is a structured plan that aligns marketing activity with business objectives and ensures every pound spent contributes to growth. Many businesses confuse marketing tactics with strategy, leading to scattered efforts and poor returns.

The Strategic Marketing Framework

- Define clear business objectives that marketing must support
- Identify and segment your target audiences
- Develop your value proposition for each segment
- Select the right channels to reach each audience
- Set measurable KPIs for every campaign
- Build a 12-month marketing calendar
- Allocate budget based on expected ROI
- Review and optimise monthly

Marketing Strategy Template

Element	Detail	Owner	Deadline
Business Objective	e.g. Increase revenue by 25%	MD/CEO	
Target Audience	e.g. SME owners, 50-200 employees	Marketing Lead	
Value Proposition	e.g. Senior expertise without full-time cost	Marketing Lead	
Primary Channels	e.g. LinkedIn, Email, SEO	Marketing Lead	
Budget Allocation	e.g. 60% digital, 25% content, 15% events	Marketing Lead	
Key Metrics	e.g. MQLs, CAC, Conversion Rate	Marketing Lead	
Review Frequency	Monthly strategy review	All	Monthly

💡 *Leadership Tip: Your marketing strategy should fit on a single page. If it takes a 50-page document to explain, it is too complex to execute effectively.*

Chapter 4: Brand Identity and Positioning

Your brand is not just your logo. It is the perception that exists in the minds of your customers, employees and the wider market. Brand identity encompasses your visual identity, tone of voice, values, and the experience you deliver at every touchpoint.

Brand Audit Checklist

Brand Element	Current State	Desired State	Action Required
Logo and Visual Identity			
Brand Guidelines Document			
Tone of Voice			
Website Alignment			
Social Media Consistency			
Email Templates			
Sales Collateral			
Customer Communications			
Internal Brand Understanding			
Competitor Differentiation			

Positioning Statement Template

For [target audience] who [need/want], [your brand] is the [category] that [key benefit] because [reason to believe]. Unlike [competitor], we [unique differentiator].

Example: For growing SMEs who need senior marketing expertise, Leadership Services is the fractional leadership provider that delivers transformative

marketing leadership because our directors have a minimum of ten years senior experience. Unlike traditional recruitment, we offer immediate impact with no long-term contracts.

 *Leadership Tip: Test your positioning statement with five customers. If they do not recognise your business in the description, your positioning needs work.*

Chapter 5: Digital Marketing Foundations

Digital marketing is no longer optional. For most businesses, the majority of customer journeys begin online, whether through search engines, social media, or email. Building strong digital foundations ensures that every other marketing activity has the infrastructure to succeed.


Digital Marketing Audit

Channel	Status	Monthly Traffic/Reach	Conversion Rate	Priority
Website (SEO)				
Google Ads (PPC)				
Social Media Organic				
Social Media Paid				
Email Marketing				
Content/Blog				
Video Marketing				
Referral/Affiliate				

Website Performance Scorecard

Metric	Current	Target	Industry Benchmark
Page Load Speed			Under 3 seconds
Mobile Responsiveness			100% responsive

Bounce Rate			40-60%
Average Session Duration			2-3 minutes
Pages Per Session			2-3 pages
Organic Traffic Growth			10-20% MoM
Domain Authority			30-50 for SMEs

 *Leadership Tip: Your website is your most important marketing asset. If it loads slowly, looks outdated, or fails to clearly communicate your value proposition, every other marketing activity will underperform.*

Chapter 6: Content Marketing Strategy

Content marketing is about creating valuable, relevant content that attracts and retains your target audience. It builds trust, establishes authority, and generates leads over time. The key is consistency and quality over volume.

Content Pillar Framework

Identify three to five core topics that align with your expertise and your audience needs. These become your content pillars around which all content is built.

Content Pillar	Target Audience	Content Types	Publishing Frequency	Conversion Goal
Pillar 1: e.g. Industry Insights	Decision makers	Blog, LinkedIn, Whitepaper	Weekly blog, monthly whitepaper	Email signup
Pillar 2: e.g. How-To Guides	Practitioners	Blog, Video, Checklist	Bi-weekly	Free tool download
Pillar 3: e.g. Case Studies	Buyers	Case study, Video testimonial	Monthly	Contact request
Pillar 4: e.g. Thought Leadership	C-suite	LinkedIn article, Podcast	Bi-weekly	Meeting booking

Content Calendar Template

Week	Topic	Format	Channel	Author	Status
Week 1		Blog Post	Website/LinkedIn		
Week 2		Video	YouTube/Social		
Week 3		Case Study	Website/Email		
Week 4		Newsletter	Email		

 *Leadership Tip: Create one high-quality piece of content per week and*

repurpose it across multiple channels rather than creating lots of mediocre content for each channel separately.

Chapter 7: Lead Generation and Demand Creation

Lead generation is where marketing directly contributes to revenue. A structured lead generation strategy ensures a predictable pipeline of qualified prospects. The most effective approach combines inbound and outbound methods tailored to your buyer journey.

Lead Generation Channel Assessment

Channel	Monthly Leads	Cost Per Lead	Lead Quality	Conversion to Sale	ROI Rating
SEO/Organic Search					
Paid Search (PPC)					
LinkedIn (Organic)					
LinkedIn (Paid)					
Email Campaigns					
Referrals					
Events/Webinars					
Content Downloads					
Partnerships					


Lead Scoring Model

Not all leads are equal. Use lead scoring to prioritise your sales teams time and focus on the prospects most likely to convert.

Criteria	Points	Example
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Job Title (Decision Maker)	10	CEO, MD, Director
Company Size Match	10	50-200 employees
Visited Pricing Page	8	Viewed pricing in last 7 days
Downloaded Content	5	Downloaded whitepaper or guide
Email Engagement	3	Opened 3+ emails in 30 days
Social Engagement	2	Liked/commented on LinkedIn post
Website Visit	1	Any page visit

Scoring thresholds: 0-10 = Cold, 11-20 = Warm, 21-30 = Hot, 30+ = Sales Ready

 *Leadership Tip: Track your cost per lead and cost per acquisition by channel. Most businesses discover that 80% of their results come from 20% of their channels.*

Chapter 8: Social Media Strategy

Social media is a powerful tool for brand awareness, engagement, and lead generation when used strategically. The mistake most businesses make is trying to be on every platform rather than excelling on the platforms where their audience actually spends time.

Platform Selection Matrix

Platform	B2B Relevance	B2C Relevance	Your Audience Present	Resource Required	Priority
LinkedIn	High	Low-Medium		Medium	
Instagram	Low-Medium	High		High	
Facebook	Medium	High		Medium	
X (Twitter)	Medium	Medium		Medium	
YouTube	High	High		High	
TikTok	Low	High		High	

Social Media Content Mix

Follow the 70-20-10 rule for content balance:

- 70% Value Content - educational, informative, entertaining content that serves your audience
- 20% Shared Content - industry news, partner content, community engagement
- 10% Promotional Content - direct promotion of products, services, offers

Monthly Social Media Tracker

Metric	LinkedIn	Instagram	Facebook	X	YouTube
Followers					
Engagement Rate					

Reach/Impressions					
Link Clicks					
Leads Generated					
Best Post Type					

 *Leadership Tip: Consistency beats virality. Posting valuable content three times a week for a year will always outperform sporadic attempts at viral content.*

Chapter 9: Email Marketing and CRM

Email marketing remains one of the highest ROI channels available, delivering an average return of 36 pounds for every pound spent. Combined with a well-managed CRM system, email marketing creates a powerful engine for nurturing leads and retaining customers.

Email Marketing Health Check

Metric	Your Score	Good	Excellent
List Size		1,000+	5,000+
Open Rate		20-25%	25-35%
Click-Through Rate		2-3%	3-5%
Unsubscribe Rate		Under 0.5%	Under 0.2%
List Growth Rate		2-3% monthly	5%+ monthly
Deliverability Rate		95%+	98%+
Revenue Per Email			Tracked and growing

Email Campaign Types

Campaign Type	Purpose	Frequency	Key Metric
Welcome Series	Onboard new subscribers	Automated (3-5 emails)	Completion rate
Newsletter	Build authority and engagement	Weekly or bi-weekly	Open rate
Promotional	Drive sales or bookings	Monthly	Conversion rate
Re-engagement	Win back inactive contacts	Quarterly	Reactivation rate
Case Study	Social proof and trust	Monthly	Click-through rate
Event Invitation	Drive registrations	As needed	Registration rate

CRM Selection Criteria

- Contact management and segmentation capabilities
- Email marketing integration
- Pipeline and deal tracking
- Reporting and analytics dashboard
- Integration with existing tools
- Scalability as your business grows
- Cost versus feature balance
- Ease of use for your team

 *Leadership Tip: Your CRM is only as good as the data in it. Invest time in data hygiene monthly to ensure your marketing automation delivers results.*

Chapter 10: Marketing Budget and ROI

Marketing budgets are often the first to be cut during challenging times and the last to be properly measured. A structured approach to budget allocation and ROI measurement ensures every pound is working hard and leadership has confidence in marketing investment.

Marketing Budget Allocation Framework


Industry benchmarks suggest businesses should invest 5-10% of revenue in marketing, with growth-stage companies investing 10-20%.

Budget Category	% of Budget	Monthly Amount	Annual Amount	Expected ROI
Digital Advertising	30%			
Content Creation	20%			
Website and SEO	15%			
Email Marketing and CRM	10%			
Events and Networking	10%			
Brand and Creative	10%			
Tools and Technology	5%			
TOTAL	100%			

ROI Tracking Dashboard

Channel	Monthly Spend	Leads Generated	Cost Per Lead	Conversions	Revenue Generated	ROI
SEO						

PPC						
Social Media						
Email						
Content						
Events						
TOTAL						

 *Leadership Tip: If you cannot measure the ROI of a marketing activity, question whether you should be doing it. Not everything is directly measurable, but brand awareness and lead generation should have clear metrics.*

Chapter 11: Marketing Team Structure and Development

Building the right marketing team is critical to executing your strategy. The structure depends on your business size, budget, and whether you choose to build in-house, outsource, or use a hybrid model.

Marketing Team Structure by Business Size

Business Size	Recommended Structure	Key Roles	Estimated Annual Cost
Under 1M revenue	Outsourced + Part-time Marketing Director	Fractional CMO, Freelance designer, Agency support	25-50K
1-5M revenue	Small in-house team + Part-time Marketing Director	Marketing Manager, Content Creator, Fractional CMO	60-120K
5-20M revenue	Full marketing team	Marketing Director, Digital Specialist, Content Manager, Designer	150-300K
20M+ revenue	Full department	CMO, Channel Managers, Content Team, Analytics, Creative	300K+

Marketing Skills Assessment

Skill Area	Current Capability	Required Level	Gap	Solution
Strategy and Planning				
Digital Marketing				
Content Creation				

Data and Analytics				
Brand and Design				
Social Media				
Email Marketing				
SEO/SEM				

 *Leadership Tip: A part-time Marketing Director can provide the strategic leadership your team needs at a fraction of the cost of a full-time hire. They bring experience from multiple businesses and can accelerate your marketing maturity.*

Chapter 12: Customer Journey Mapping

Understanding how customers discover, evaluate, purchase, and advocate for your business is essential to effective marketing. Customer journey mapping reveals the touchpoints where marketing can have the greatest impact.

Customer Journey Map Template

Stage	Customer Action	Touchpoints	Customer Emotion	Marketing Opportunity
Awareness	Recognises a need or problem	Search, Social, Referral, Ads	Curious, Uncertain	Educational content, SEO, Thought leadership
Consideration	Researches solutions	Website, Reviews, Case Studies	Evaluating, Comparing	Comparison guides, Testimonials, Demos
Decision	Chooses a provider	Proposals, Sales calls, Website	Cautious, Hopeful	Clear pricing, Risk reducers, Social proof
Purchase	Completes transaction	Checkout, Onboarding, Email	Excited, Anxious	Welcome sequence, Clear next steps
Retention	Uses product/service	Support, Email, Account management	Satisfied or Frustrated	Check-ins, Value-add content, Upsell
Advocacy	Recommends to others	Reviews, Referrals, Social	Enthusiastic, Loyal	Referral programme, Case study requests

Touchpoint Audit

List every point where a customer interacts with your brand and rate the experience quality from 1 to 10.

Touchpoint	Stage	Channel	Quality (1-10)	Improvement
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				Action
Google search result	Awareness	SEO		
Website homepage	Awareness	Web		
Blog article	Consideration	Content		
Contact form	Decision	Web		
Proposal email	Decision	Email		
Onboarding call	Purchase	Phone		
Monthly report	Retention	Email		
Review request	Advocacy	Email		

 *Leadership Tip: Walk through your own customer journey as if you were a new prospect. The experience gaps will quickly become apparent.*

Chapter 13: Marketing Analytics and Reporting

What gets measured gets managed. Marketing analytics provide the data-driven insights needed to optimise campaigns, justify budget, and demonstrate the value of marketing to the wider business. Without measurement, marketing becomes a cost centre rather than a growth driver.


Marketing Dashboard KPIs

KPI	Definition	Target	Current	Trend
Website Traffic	Unique monthly visitors			
Traffic Sources	% from organic, paid, social, direct			
Lead Volume	Marketing Qualified Leads per month			
Cost Per Lead	Total marketing spend / leads generated			
Conversion Rate	Leads to customers %			
Customer Acquisition Cost	Total cost to acquire one customer			
Customer Lifetime Value	Total revenue from average customer			
Marketing ROI	Revenue generated / marketing spend			
Email Open Rate	% of emails opened			

Social Engagement Rate	Interactions / followers %			
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Monthly Marketing Report Template

- Executive Summary - 3 key wins, 3 key challenges
- Traffic and Lead Generation - volume, sources, trends
- Campaign Performance - results versus targets for each active campaign
- Channel Performance - breakdown by channel with ROI
- Budget Update - spend versus budget, forecast for remainder of quarter
- Competitive Activity - notable competitor moves
- Recommendations - proposed actions for next month
- Pipeline Impact - marketing contribution to sales pipeline

 *Leadership Tip: Present marketing data in business language. Leadership teams care about revenue impact, pipeline contribution, and customer acquisition cost - not impressions and click-through rates.*

Chapter 14: Product and Service Launch Marketing

Launching a new product or service is one of the highest-impact marketing activities. A structured launch plan ensures maximum visibility, generates early momentum, and sets the foundation for sustained growth.


Launch Timeline Template

Phase	Timeframe	Key Activities	Owner	Status
Research and Planning	12-8 weeks before	Market research, competitor analysis, positioning	Marketing Director	
Pre-Launch Content	8-4 weeks before	Blog posts, teaser social content, email list building	Content Team	
Sales Enablement	6-4 weeks before	Sales decks, objection handling, pricing documentation	Marketing + Sales	
Soft Launch	2-1 weeks before	Beta testing, early access for key customers	Product + Marketing	
Launch Day	Day 0	Press release, email blast, social campaign, website update	Full Team	
Post-Launch Week 1	Days 1-7	Monitor feedback, respond to enquiries, adjust messaging	Marketing Team	
Post-Launch	Days 7-30	Case studies,	Marketing	

Month 1		testimonials, performance review	Director	
Optimisation	Ongoing	Refine messaging based on data and feedback	Marketing Team	

Launch Readiness Checklist

- Value proposition clearly defined and tested
- Target audience identified and segmented
- Pricing strategy finalised
- Website landing page live and optimised
- Email sequences built and tested
- Social media content calendar ready
- PR and media outreach planned
- Sales team briefed and equipped
- Analytics tracking in place
- Success metrics defined

 *Leadership Tip: The best product launches start marketing activity weeks before launch day. Build anticipation and an audience before you have something to sell.*

Chapter 15: Customer Retention and Loyalty

Acquiring a new customer costs five to seven times more than retaining an existing one. Yet most marketing budgets focus heavily on acquisition with little investment in retention. A structured retention strategy builds loyalty, increases lifetime value, and turns customers into advocates.

Customer Retention Metrics

Metric	Definition	Your Score	Industry Average	Target
Customer Retention Rate	% of customers retained over 12 months		70-80%	
Churn Rate	% of customers lost over 12 months		20-30%	
Net Promoter Score	Likelihood to recommend (1-10)		30-50	
Customer Lifetime Value	Average total revenue per customer			
Repeat Purchase Rate	% of customers who buy again			
Referral Rate	% of customers who refer others		5-15%	

Retention Strategy Framework

Strategy	Description	Implementation	Expected Impact
Onboarding Excellence	Structured welcome and setup process	Automated email series + personal check-in	Reduce early churn by 30%

Regular Communication	Consistent value-add touchpoints	Monthly newsletter + quarterly review	Increase engagement by 40%
Loyalty Programme	Reward repeat business	Points, discounts, or exclusive access	Increase repeat purchase by 25%
Feedback Loops	Regular customer satisfaction checks	Quarterly surveys + annual review	Identify at-risk customers early
Community Building	Create customer community	Online forum, events, user groups	Increase advocacy and referrals
Personalisation	Tailored communications and offers	CRM segmentation and automation	Increase open rates by 50%

 *Leadership Tip: Send a personal check-in to your top 20 customers this month. A genuine conversation about their needs will reveal more than any survey.*

Chapter 16: When to Bring in a Marketing Director

This playbook has provided the frameworks and tools to manage your marketing function. However, there comes a point where every growing business needs dedicated strategic marketing leadership. Recognising that point is critical to maintaining momentum.

Signs You Need a Marketing Director

- Your marketing activity is reactive rather than strategic
- You cannot clearly articulate your marketing ROI
- Your brand messaging is inconsistent across channels
- Marketing is managed by someone whose primary role is something else
- You are spending money on marketing but cannot track what is working
- Your competitors are outpacing you in market visibility
- Your sales team complains about lead quality or volume
- You have a marketing team but no one providing strategic direction
- You are planning significant growth and need marketing to support it
- You have tried agencies but lack the internal leadership to manage them effectively

The Part-Time Marketing Director Model

For businesses that need strategic marketing leadership but are not ready for a full-time hire, a part-time or fractional Marketing Director offers the ideal solution.

Factor	Full-Time Hire	Part-Time Marketing Director
Annual Cost	60-120K + benefits + recruitment fees	21-50K depending on days required
Time to Start	3-6 months recruitment process	Immediate - start within days
Experience Level	One background and perspective	Multiple sector and business experience
Risk	High - long notice periods, redundancy costs	Low - flexible contracts, no long-term tie-in
Strategic Impact	Dependent on individual capability	Proven frameworks from multiple businesses

Team Development	Can mentor but one perspective	Brings best practice from across industries
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Leadership Services provides experienced part-time Marketing Directors and fractional CMOs who join your team and deliver transformative leadership from day one. Our Marketing Directors have a minimum of ten years senior experience and a track record of delivering measurable growth.

Ready to Transform Your Marketing?

Contact Leadership Services today for a free, no-obligation conversation about how a part-time Marketing Director can accelerate your business growth.

- Call: 0330 236 8932
- Email: hello@leadership-services.co.uk
- Web: www.leadership-services.co.uk
- Book a call: calendly.com/d/ctvg-k3f-rqh/leadership-services-intro

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