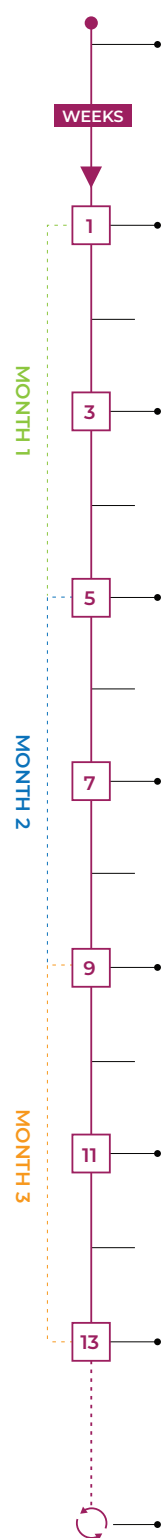


# Installing UMS™



	AGENDA	WHO IS PRESENT	HOMEWORK
<b>2-HOUR SESSION</b> <b>UMS PERSPECTIVES</b> <i>Intro to UMS and adopting a market orientation, core concepts, and how we solve problems and make the solutions repeatable/scalable over time</i>	<ul style="list-style-type: none"> <li>→ Intro to UMS process (whiteboard)</li> <li>→ 13 Questions</li> <li>→ Core Concepts</li> <li>→ Diagnostic Review</li> <li>→ Eulogy Exercise</li> <li>→ Overview of interview process</li> <li>→ Determining interview candidates</li> </ul>	<ul style="list-style-type: none"> <li>→ Executives and Marketing Management</li> </ul>	<ul style="list-style-type: none"> <li>→ UMS Diagnostic</li> </ul>
<b>1</b>			
<b>4-HOUR SESSION</b> <b>MISSION DAY</b> <i>Our goal is going to define our Project, Mission, and Objectives per UMS</i>	<ul style="list-style-type: none"> <li>→ Competitive Radar Exercise</li> <li>→ Project Statement</li> <li>→ Market Focus Exercise</li> <li>→ Mission</li> <li>→ Objectives</li> <li>→ Discuss interview questions</li> </ul>	<ul style="list-style-type: none"> <li>→ All Hands</li> </ul>	<b>FOR EVERYONE:</b> <ul style="list-style-type: none"> <li>→ UMS Orientation Questionnaire</li> <li>→ SWOT Analysis</li> <li>→ Market Focus Exercise</li> </ul> <b>FOR EXECUTIVES:</b> <ul style="list-style-type: none"> <li>→ Define roles within the team</li> </ul>
<b>3</b> <b>ADDRESSES QUESTIONS:</b> 1 3			
<b>2-HOUR SESSION</b> <b>FOCUS ON BUDGET</b> <i>The LTV:CAC Ratio and the numbers behind it</i>	<ul style="list-style-type: none"> <li>→ Review and evaluate progress on OKRs</li> <li>→ Review math on LTV and CAC</li> <li>→ Discuss budgeting and whether OKRs need to be adjusted based on results</li> </ul>	<ul style="list-style-type: none"> <li>→ Executive</li> <li>→ Administrative</li> <li>→ Financial</li> <li>→ Sales</li> </ul>	<ul style="list-style-type: none"> <li>→ Completed draft of OKRs</li> <li>→ Draft of LTV and CAC</li> </ul>
<b>5</b> <b>ADDRESSES QUESTIONS:</b> 2 6 7			
<b>2-HOUR SESSION</b> <b>FOCUS ON CUSTOMERS</b> <i>Developing Personas</i>	<ul style="list-style-type: none"> <li>→ Review interviews and key findings -- what do they mean?</li> <li>→ Listing/creating personas</li> <li>→ Buying circles</li> </ul>	<ul style="list-style-type: none"> <li>→ Administrative</li> <li>→ Research</li> <li>→ Sales</li> <li>→ Product</li> </ul>	<ul style="list-style-type: none"> <li>→ Customer Interviews</li> </ul>
<b>7</b> <b>ADDRESSES QUESTIONS:</b> 4 5			
<b>2-HOUR SESSION</b> <b>FOCUS ON UNDERSTANDING</b> <i>Curating your brand's voice, prioritizing your efforts based on the sales process, and the value of good customer experiences</i>	<ul style="list-style-type: none"> <li>→ Review and evaluate personas discuss voice</li> <li>→ Relating the sales hill to customer experience</li> <li>→ Discussing ways that we can improve that experience</li> </ul>	<ul style="list-style-type: none"> <li>→ Administrative</li> <li>→ Research</li> <li>→ Sales</li> <li>→ Product</li> <li>→ Creative</li> </ul>	<ul style="list-style-type: none"> <li>→ Draft Persona Worksheets (first page)</li> <li>→ Calculations for LTV for your best and worst customers</li> </ul>
<b>9</b> <b>ADDRESSES QUESTIONS:</b> 8 9 10			
<b>2-HOUR SESSION</b> <b>FOCUS ON COMMUNICATIONS</b> <i>Discussions on how we are going to make potential customers comfortable with what we are offering them and how</i>	<ul style="list-style-type: none"> <li>→ Review and evaluate completed persona drafts (with special focus on the communications guidelines)</li> <li>→ Workshop a list of core materials that marketing tactics can be built upon</li> </ul>	<ul style="list-style-type: none"> <li>→ Administrative</li> <li>→ Research</li> <li>→ Sales</li> <li>→ Product</li> <li>→ Creative</li> <li>→ Reporting</li> </ul>	<ul style="list-style-type: none"> <li>→ Draft Persona Worksheets (second page)</li> <li>→ Bring a list of all the marketing assets you believe you have (popular web/social content, case studies, testimonials, white papers, ebooks, videos, awards/certifications, offers, etc.)</li> </ul>
<b>11</b> <b>ADDRESSES QUESTIONS:</b> 10 11			
<b>2-HOUR SESSION</b> <b>FOCUS ON TACTICS</b> <i>What tactics will our marketing strategy include?</i>	<ul style="list-style-type: none"> <li>→ Review of buying process priorities for each persona</li> <li>→ Tactics workshop</li> <li>→ Tactics Prioritization Worksheet</li> <li>→ Introduction to the creative brief</li> </ul>	<ul style="list-style-type: none"> <li>→ Administrative</li> <li>→ Sales</li> <li>→ Product</li> <li>→ Creative</li> <li>→ Reporting</li> </ul>	<ul style="list-style-type: none"> <li>→ Refined list of core materials and a plan to create them</li> </ul>
<b>13</b> <b>ADDRESSES QUESTIONS:</b> 12			
<b>2-HOUR SESSION</b> <b>FOCUS ON MEASUREMENT</b> <i>How are we going to measure our success?</i>	<ul style="list-style-type: none"> <li>→ Review tactic</li> <li>→ Discuss methods and tools for measuring success, how those measures relate to OKRs, and potential issues that we may run into along the way</li> </ul>	<ul style="list-style-type: none"> <li>→ Executive</li> <li>→ Administrative</li> <li>→ Sales</li> <li>→ Reporting</li> </ul>	<ul style="list-style-type: none"> <li>→ Refined list of prioritized marketing tactics (with budgets)</li> </ul>
<b>13</b> <b>ADDRESSES QUESTIONS:</b> 13			