

Marketing Careers & Skills Development Workbook

Tools and techniques to give you clarity on your future career path, develop your marketing skills and position yourself to attract the roles you want.





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ABOUT THE AUTHORS

Imran Farooq

CEO of MMC Learning and Senior Examiner at the Chartered Institute of Marketing

A pioneer in the world of online education, Imran has championed the growth and empowerment of over 30K global marketers and entrepreneurs. His wealth of experience, spanning over two decades, gives him a unique and insightful perspective on the evolving dynamics of marketing, the integration of AI technology, and the intricacies of customer journey mapping.



His deep-thinking approach and proven ability to drive results have established him as a leader in the field, and his innovative methods continue to push the boundaries of what's possible in digital marketing.

Connect to Imran on LinkedIn

Amelia Cooper



Amelia is Head of Content at Smart Insights and is responsible for managing the paid member content library and e-learning resources, as well as strategic planning to ensure customers get the most from their memberships.

She is a University of Southampton and the Chartered Institute of Marketing graduate with over 8 years' experience in digital marketing, specializing in content marketing.

She is passionate about personal development and helping other marketers grow their skills in a dynamic industry.



INTRODUCTION

Your learning journey - take 100% ownership

Thank you for downloading this workbook. It's designed to help you reflect, gain clarity, and plan your future career as a marketer.

In the past, your employer used to be one of the main drivers to help identify your skills gaps and investigate the training options available. Employers can help you to progress in your career and if they are invested in you, they will push you to take different courses. This is still true to an extent, but with the fast-paced changes in the digital marketplace and the widening variety of skills required to be an effective marketer, the responsibility is more on individuals to stay on top of industry knowledge and improve their skills to stay competitive.

It's increasingly up to you to take ownership of your career development and personal learning journey. That is, if you want to become a marketer who is adaptable to the changes around you, possesses the skills to do the job effectively, and is focused on achieving your career and personal goals.

This workbook contains a series of exercises to help you plan your marketing career. Some exercises you may want to answer in more depth and detail and some could be answered briefly. These exercises will help you no matter where you are in your marketing career journey. Take some time away from your day-to-day tasks to complete the workbook to help you focus. This will allow you to think deeply and look for the one or two light bulb actions you can take that can make a big impact in driving towards achieving your career goals.

"You're either remarkable or invisible. Make a choice."

– Seth Godin

How will this resource help me and my business?

There is an abundance of opportunities ahead for marketers who develop the right skills and gain the relevant experience that employers are looking for. If you want to capture some of these opportunities, you will need to be well-positioned, have the right blend of digital marketing skills and, most importantly, know where you are going and how you can progress to get there. This workbook contains a series of activities for you to take some time out from the noise around you, to reflect and get clarity on the paths you can follow.



This workbook will use a series of guided questions to help you:

- ☑ Map out your personal short-term and long-term goals
- ✓ Help you identify current strengths, weaknesses, opportunities and threats that can
 or could affect your marketing career
- ✓ Identify the key elements that will motivate you to take action
- ✓ Understand the different paths you can take to get to your destination
- Analyze yourself against the 25 digital marketing skills

Who is this guide for?

The guide is aimed at helping any of these marketing roles:

- ☑ Anyone wanting to transfer into a marketing role
- ✓ New and junior marketers
- Marketing and digital marketing managers
- ☑ Senior marketers and directors
- Digital specialists
- ☑ Freelance marketers

How is this guide structured?

This guide uses a series of structured questions to help you review your current career, define your aspirations for the future and define steps to develop the skills you need to progress.

The sections are:

- 1. Grow your skills with RACE
- 2. Your pathway to become a successful marketer
- 3. Positioning yourself
- 4. Developing proficiency in your skills including digital marketing mastery
- 5. Recommended Smart Insights resources



About Smart Insights

Smart Insights is a self-service digital marketing improvement platform that supports individuals, teams, and organizations to plan, manage and optimize their marketing.



Actionable learning and data-driven content covering the full customer lifecycle is provided in a dynamic learning ecosystem to save marketers time, provide quality advice, frameworks and templates that are proven to improve marketing processes and deliver results.

Each month, over 500,000 marketers, consultants and business owners use our blog, sample marketing templates and digital marketing essentials newsletter to follow best practices and keep up to date with the developments that matter in digital marketing.

Thousands of Business Members from over 170 countries use our premium planning and management toolkits, templates, guides, and digital Learning Paths to map, plan, and manage their marketing using the Smart Insights RACE Growth System.

We hope you find this workbook useful in reflecting on your career and identifying improvements for the future.

We would love to support you to reach your goals with the Learning Paths, templates and tools available in a Smart Insights premium membership.



Enhance Your Expertise

Boost your career with Certified Learning Paths, seamlessly paired with proven templates and tools, translating learning into action.



Achieve Marketing Success

Deploy the RACE Growth System's arsenal of best practice processes, templates and tools to watch your results soar.



GROW YOUR SKILLS WITH RACE

Becoming a certified RACE digital strategist

Research shows that employers seek marketing professionals who combine practical knowledge of getting results from digital channels that reach and engage today's audiences PLUS they must know how to plan an integrated approach to strategy, campaigns and always-on marketing...

A digital marketing strategist is an expert in creating and implementing integrated digital marketing strategies and optimizing the success factors for implementing best practices to support the goals of a business.

The Smart Insights learning approach is to help support your career development so that you can become a strategic T-Shaped marketer who has a wide breadth of knowledge of modern marketing channels and an in-depth knowledge of detailed best practices for effective use of these channels. But it goes beyond that, since employers are looking for a broader skill-set than digital media. They need self-starters who know how to create strategy and plans for the business and individual channels. Unlike most online learning, all our toolkits start with goals and strategy rather than diving straight into tactics.

THE STRATEGIC T-SHAPED MARKETER



We cover becoming a T-shaped marketer more in Section 3 of this workbook.

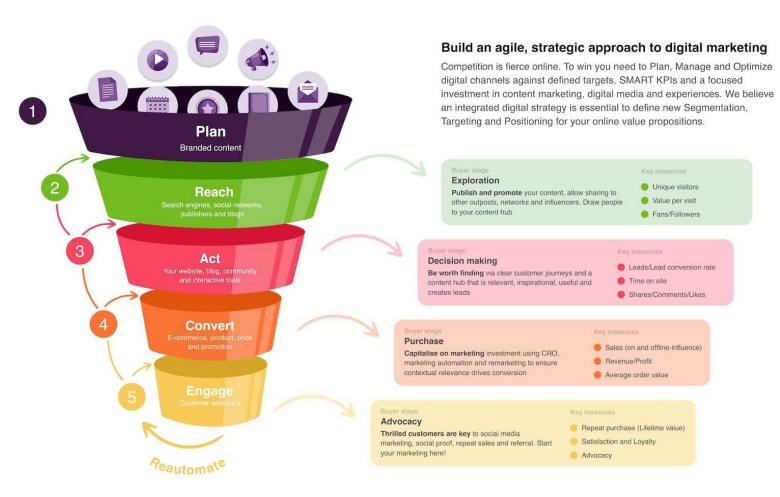


The RACE Growth System

We created the Smart Insights RACE Growth system to empower marketers to use a strategic, planned approach while competing using the latest best practices which are so important to success.

Our RACE Growth System for improving marketing effectiveness has two parts:

- 1. The RACE Planning Framework: defines the essential activities and measures businesses need to master to survive and thrive in today's marketing world. Our members' Learning Paths and downloadable templates break this down further, recommending 25 key marketing activities 5 for each part of RACE that are essential for businesses to compete by improving their digital marketing maturity.
- **2. The RACE OSA improvement process:** defines the three steps needed to build and implement your growth plan either for your overall marketing plan or for an individual channel, such as organic search, social media or email marketing.



Using the RACE Growth System, you can improve your skills as a digital marketing strategist by helping meet customer and business needs strategically, at every stage of the marketing funnel.



YOUR PATHWAY TO BECOME A SUCCESSFUL MARKETER

People who have achieved success in their lives, in their business or in their careers all have one thing in common – they have been on a journey to get there which is, often, a long journey. It's easy to underestimate what is required to get there and most people miss their one-year goal, give up, and lose track of their core purpose and goals.

This section contains a series of activities to help you get clarity on what you want and to help put some structure on designing your future path.

Start with the why - Your purpose

For anyone on their career journey, it's important to clarify and articulate a purpose. This purpose can act as a motivational force to help you keep going through tough times and get you back on track. Best-selling author Simon Sinek developed the Golden circle model which talks about the "why". Sinek researched great leaders on how they inspire people to take action and companies that defy what is possible to exceed expectations. He found that these great leaders always communicated and articulated their purpose very well. When asked what they do, most people talk about the "how" and the "what", but people rarely talk about the "why".

As a marketer, whether you are at the start of your career or at a later stage, it is always useful to clarify why you decided to take this journey.

What is the WHY behind your marketing career journey?

Enter your purpose - why are you doing what you do? What drives you to improve?



Personal SWOT

As marketers, you will all be familiar with the SWOT business analysis tool, but you may not have applied it in a personal scenario. SWOT is an acronym which stands for Strengths, Weaknesses, Opportunities and Threats.



Using this for personal development can help you highlight your core abilities, helping identify which are strong and which may need development. This exercise can also help uncover opportunities that may be within reach but you're unaware of or haven't explored yet. Generally, this will be because you've never dedicated quality thinking time to them and haven't outlined the steps required to take action.

Weaknesses and Threats can be overcome, but it is important to identify them in order to find ways to mitigate them. Is there a certain area of marketing you struggle with? How can you develop your skills to turn that weakness into a strength?

Over the next few pages, answer the questions under each section to create your own personal SWOT analysis.



1. Your Pathway to Becoming a Successful Marketer



What are the areas you excel in?

What abilities and skills do you have that set you apart from your team?

What are you naturally good at (tasks, thinking, approach)?





What types of tasks do you struggle with or avoid?

Why would your boss select someone else to do a task over you?

What things are limiting you from progressing forward?





What is the employer/market demand that meets the skills/knowledge you own or could easily acquire?

Do you have transferable skills that could be used in other areas or marketing?

Who are the people in your company that can help you progress your skills?



1. Your Pathway to Becoming a Successful Marketer



Which of your skills could go out of date quickly?

What are the threats facing your industry that could impact your role?

What is the impact of technology and automation on your role?



1. Your Pathway to Becoming a Successful Marketer

Different career pathways

Marketing career paths used to be more linear, with only a handful of roles and marketing job titles being used. You would start off working as a marketing assistant, work your way up to become a marketing manager, then onto senior and director-level positions.

With digital marketing and the internet, the marketer career ladder has completely changed. You'll now see a vast array of new roles at all levels - from entry level, to management, to senior and director level. There are job titles that didn't exist even a year ago, and there will be new job titles appearing in the future that don't exist today.

For this activity, research different job websites in your country to identify future roles that you would like to explore. Analyze them and assess whether you could carry out the roles.

Smart Insights Business members can use our job descriptions template.

Career pathways

What are the job titles?

What are employers looking for?



Making key decisions on your pathway

In every aspect of life, you are presented with different choices and you have to make decisions that are going to impact your future. Some of these can have a small impact and others can be larger. Sometimes, the decisions are made quickly and sometimes we spend a lot of time procrastinating over them.

"Future scoping" style exercises are useful when making some of the bigger decisions because we all want to live life without regrets – we don't want to be in a future where we say "I wish I had done that". Sometimes, we get into a comfort zone and don't want to leave. We want to choose a life of ease rather than a new or more adventurous path.

The CEO of Amazon, Jeff Bezos, and many other successful people use the next exercise, and it's clear it had a profound impact on the direction they decided to take. Find a quiet space so you can meditate on this one.

Future scoping

Either imagine you are retired and have reached the age of 80 OR imagine yourself 10 years in the future. Reflect and think deeply about the kind of life you would have wanted and the things you might regret. Then consider the sentence below:

"I wish I had done	in my life, in my business or in my career"
List your conclusions belo	W:



2 POSITIONING YOURSELF

If there was a new job opportunity, would the management of your organization consider you for that role? If you aren't that person then you have a lot of work to do to get yourself positioned in the minds of the key decision-makers.

How do you stand out from the crowd of marketers? How do you want others to feel about you – your line manager, the team you work with, and future employers? There are many aspects to positioning yourself and the following exercises will help you.

Introducing yourself

When you meet someone for the first time, most people (within seconds) mentally give you a score based on the way you look and the very first interaction – which is how you introduce yourself. A great interaction would be an intro that obviously includes your name, where you're from, and something that inspires you or communicates your purpose. This will trigger a response, such as a question of interest, from the person you are speaking to.

The potential response that you should be aiming to get from your introductory sentence should be along the lines of "That sounds interesting, tell me more" or something like "Oh really, how did you do that?"

Your 'elevator pitch' - opening sentence

For this activity, design your perfect introduction that can be delivered when interacting with people in live scenarios. Brainstorm the words you can use.

Write out your one sentence introduction:



Personal elevator pitch

The elevator pitch is an extension to the brief introduction you created on the previous page. It goes into a little more detail and is designed to ignite interest in your organization, products, project ideas or in any pitching scenario.

It needs to be clear and concise, engaging your target audience so they don't lose interest. It can include things like when you started your journey, your purpose, the impact you have made, what insights you have learned, and what skills and knowledge you have picked up on the way.

You can take what's on your mind and create specific statements around your values, beliefs, ideas, and dreams. It is important that these items clearly connect to each other so your audience is not trying to work out what you do. You may have had lots of different roles or seemingly random experiences in the past. This means there needs to be a clear explanation of how one thing led to another, how the lessons you learnt link from one point to another, and then how it all adds value to what you do now. The goal is to communicate how having all these different experiences helped you create the perfect recipe for success going forward.

Detailed elevator pitch

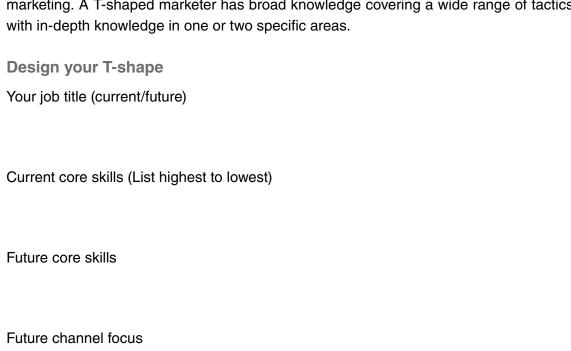
Draft out an elevator pitch referring to your notes from earlier in this section (usually 30 seconds, could be up to 60 seconds depending on the scenario you are in).



3 DEVELOPING PROFICIENCY IN YOUR SKILLS

The T-shaped marketer – design your T

With the expansion of channels and increasing range of marketing skills, it is important for a marketer to broaden their skillset to be able to effectively deliver projects for an organization. The approach of developing a range of skills is known as T-shaped marketing. A T-shaped marketer has broad knowledge covering a wide range of tactics with in-depth knowledge in one or two specific areas.



Robots are here

The topic of Al and robots is vast and has wide-ranging implications on all job roles across most industries, including the function of marketing. This is happening whether we like it or not, so marketers should not overlook these developments as there will be ramifications on ground-level marketing activity at some point in the future.

To learn the types of skills to develop, Business Members can read our regularly updated guide to applying Al and Machine Learning to marketing.

In the short-term, marketers should take an interest and be aware of what is on the horizon and start to gain some knowledge of the different aspects of AI. In bite sizes, some roles are already being automated, such as media buying.

Al and Machine Learning skills

What are the first types of roles in marketing that will impacted by AI and the automation it brings?

What are the personal implications in a future world of automation?

What are the techniques to get excited about?

What are the skills you need to learn from the key applications of AI to marketing?

Digital marketing mastery using the RACE Planning Framework

For success in the future, marketers should commit to mastery of digital skills. The next section looks at the 25 digital skills that you can rate yourself against based on the Smart Insights RACE Planning Framework.

The RACE mnemonic summarizes the key online marketing activities that need to be managed as part of digital marketing. RACE covers the full customer lifecycle or marketing funnel from:

More details on each stage are available in our free digital marketing planning template.

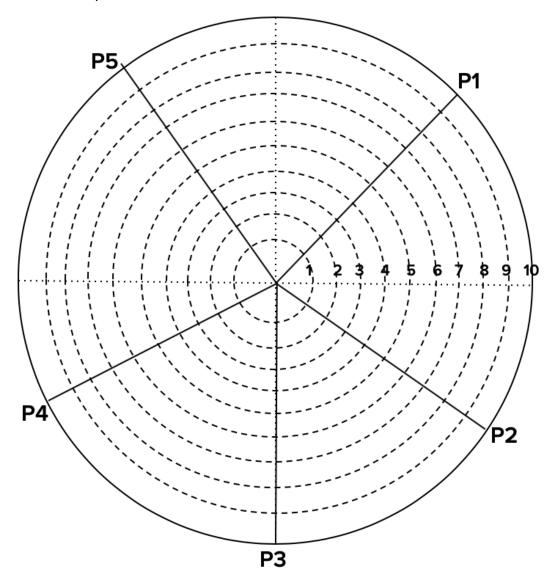
You can review your skills in each area of RACE in the upcoming sections.

The 25 point breakdown of RACE defines the key marketing activities that businesses need to manage. Print out the radar charts on pages 20-24 and rate your skills. For long-term professional development, these charts should be filled in and compared every 6-12 months.



PLAN

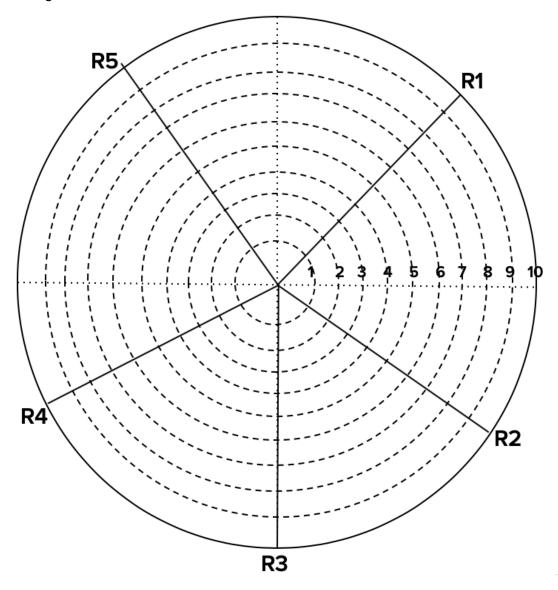
- **P1 Performance review:** Do you know how to audit the effectiveness of your digital marketing?
- **P2 Vision and objectives**: Can you set a vision and specific SMART objectives for digital marketing?
- P3 Strategy and governance: Can you create a digital/multichannel marketing strategy?
- **P4 Segment and target:** Can you define audience segments and personas to create more targeted, responsive personalization?
- **P5 OVP and experience:** Can you review your online website/app proposition and multichannel experience?





REACH

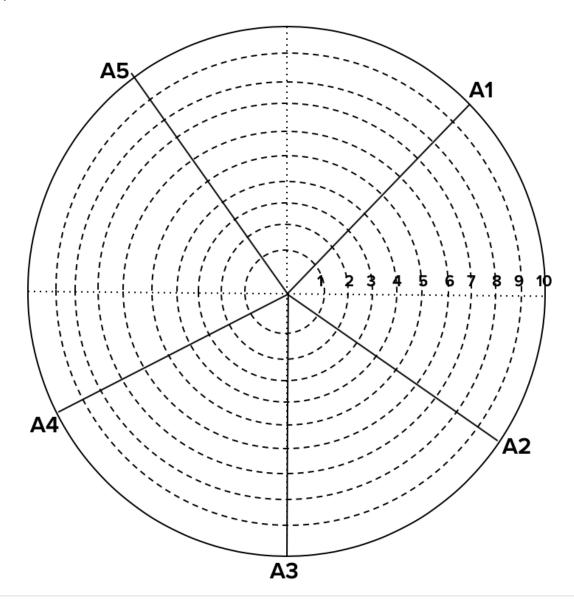
- **R1 Review media effectiveness:** Do you know the steps needed to create an analytics report on the effectiveness of media?
- **R2 Search marketing:** Do you know best practices and levers to gain results with organic search and Google Ads?
- **R3 Owned media and influencers:** Do you understand the process of online PR and influencer outreach?
- **R4 Paid media:** Do you have broad and deep experience of the many online paid media options?
- **R5 Acquisition plan:** Can you create an annual multi-channel media plan to achieve defined goals?





ACT

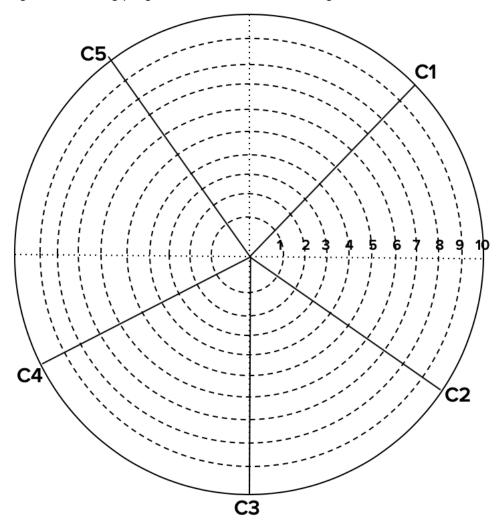
- **A1 Customer journeys:** Can you use analytics and research to review journeys and plan improvements?
- **A2 Lead capture and profile:** Do you know how to define customer data needs and profiling techniques?
- **A3 Content marketing:** Can you create a plan to engage audiences and gain commercial results through content marketing?
- **A4 Landing pages:** Can you design and improve landing pages to generate results?
- **A5 Campaign planning and content schedule:** Can you create a campaign brief and plan/schedule activities?





CONVERT

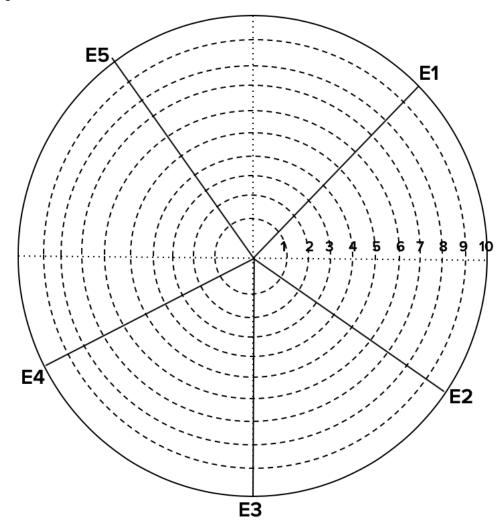
- **C1 Nurture and retargeting:** Do you know how to plan and execute prospect nurturing and ad retargeting to convert initial interest to sale?
- **C2 Web personalization:** Are you able to define rules and implement effective website personalization?
- **C3 Improve mobile experiences:** Can you assess the importance and sequence of mobile and desktop website interactions? Can you then specify and optimize the UX of mobile optimized experiences into the customer journey?
- **C4 Multichannel selling:** Do you know how to review and design persuasive multichannel sales processes including use of web self-service help, support material and Livechat?
- **C5 Conversion rate optimization:** Do you have the knowledge to design and run a CRO or growth-hacking programme based on AB testing and other relevant tools?





ENGAGE

- **E1 Customer onboarding:** Can you review and implement customer welcome and activation?
- **E2-Customer loyalty:** Are you able to assess customer satisfaction and communications effectiveness and improve it by implementing an action plan?
- E3 Customer service: Can you review and improve multichannel customer service?
- **E4 Email communications:** Can you review business email marketing lifecycle activities across the customer lifecycle, design an email contact strategy, and optimize delivery/creative to maximize results?
- **E5 Social media communications:** Can you review social media presence and communication effectiveness for a business, design social media governance strategies, and create practical organic and paid social network updates to improve audience engagement and business contribution?





Prosperity - organization skills

Your success or prosperity is dependent on the prosperity of the organization you work for. So, you should be highly focused on how you can help your organization be successful.

Reflect on the skills you rated yourself for in the previous section, then compare against the gaps and opportunities that will allow you to make an impact within your organization.

Review organization skills

RACE activities	What are the gaps in your organizations?	What skills can you bring to plug these gaps? Or what do you need to learn to plug these gaps?
Plan		
Reach		
Act		
Convert		
Engage		

Personal Development Plan

With everything you've completed so far in this workbook, we now want to consider how we can put all this useful information into a plan for you to follow. Having a plan for your personal development will help you stay on track of your development and help you commit to making steps to developing your skills.

These plans are a great way of working with your manager to show how you would like to continuously develop professionally, and can be used as part of review meetings or monthly/quarterly 1-2-1s to show progress and discuss learnings. This can be a useful way to demonstrate the added value you bring to your organization.

On the next two slides we have a completed example of a personal development plan, followed by a blank editable template for you to complete.



Personal Development Plan: example

PDP for: Jo Sample

My goal: My goal is to increase my knowledge and skills across all digital marketing channels so I am in a good position to apply for a promotional position in two years.

My current reality: I am very successful in my current role and often take on extra responsibilities around administration and other general tasks. Often I hear people talking about other marketing channels, such as email and social media, and I want to be able to know how to use these to support a campaign.

My options:

- ☐ Work through Smart Insights Learning Paths
- Attend webinars and listen to podcast
- ☐ Join professional groups on LinkedIn
- ☐ Attend professional networking sessions and events
- ☐ Professional reading

My way forward:

- ☐ I will commit to completing one Learning Path per week and discuss how these skills can be implemented into my role.
- ☐ I will make time with the current team leaders to talk about how they manage their time.
- The organisation can support me by allowing me one hour per week to complete the learning in work time.

Progress reviews and feedback sessions:

- ☐ Progress review meetings will occur every four weeks
- ☐ Feedback will be provided by my manager on a regular, unscheduled basis

Plan start date: 01/01/2024

Plan finish date: 01/06/2024

Business goal match: As the business grows there will be opportunities for team expansion which will require new team leads. Jo's goal is aligned to business direction.

Manager comments: At Jo's last performance appraisal she was rated highly and she indicated a desire to take on additional responsibilities. She has done this but in order to progress further she needs to understand how each channel works and how they are integrated into a unified campaign. I believe she has the capacity to gain these skill but it will require consistent, dedicated effort to achieve her goal.

Manager comments: I agree with Jo's options. She will be able to monitor her progress through the Smart Insights Dashboard and I will be able to see progress as well, offering support where needed.

Progress summary: 15/03/2024

Working steadily through resources:

- Campaign Planning 100%
- RACE Practical Digital Strategy 45%
- ☐ Has attended 2 webinars

Manager comments: These commitments will be monitored via the dashboard and during progress and feedback sessions. I am committed to allowing Jo one hour per week to fully focus on learning. She is encouraged to book a quiet room to do this away from distractions.

Progress summary: 15/03/2024

My work load has increased with the resignation of one of the team. I have renegotiated the timeline for completion with my manager to take this into account.

Final review comments: 30/06/2024: I have successfully completed 4 Learning Paths that are most relevant to my current role and to support her progression toward applying for a promotional position. It has been difficult for me to find time to implement what I have learned but this will form the basis of my next plan.



PDP for:	Plan start date:	Plan finish date:
My goal:	Business goal match:	
My current reality:	Manager comments:	
My options:	Manager comments:	Progress summary:
My way forward:	Manager comments:	Progress summary:
Progress reviews and feedback sessions:	Final review comments:	



4 RECOMMENDED RESOURCES

Recommended resources for developing your personal marketing skills

- ☐ RACE Practical Digital Strategy Learning Path Learn how to create and implement an integrated omnichannel marketing plan.
- PowerPoint digital marketing strategy planning template Create a detailed digital marketing strategy structured using our RACE planning system.
- □ Digital Skills Assessment Get recommendations on the most relevant resources to improve your knowledge and improve results for your business, rate yourself for each of the 25 key areas of digital marketing (example below). When completed, you'll get your own Personalized Learning Plan to structure your skill development.

