

The Team Alignment Handbook

10+ Lessons on Aligning Teams From Leaders at Google, Nvidia, Vimeo, Venngage, Wrike, Mutiny, and Pantheon.



Table of Contents

What is alignment? It's a constant activity.	03
Chapter #1: On instilling an agile mindset across your team	05
Chapter #2: On the role culture plays in aligning teams	12
Chapter #3: On goal-setting to align teams	18
Chapter #4: On structuring and running meetings	28
Chapter #5: On keeping your team connected and productive	37
Final thoughts	45



Sarah Fruy

Director of Brand & Digital @ Pantheon



Aristomenis Capogeannis

Director of Marketing (Networking) @ Nvidia



Nadya Khoja

Chief Growth Officer @ Venngage



Camila Kaul

Head of Sales Dev & Strategy @ Google



Melissa Matlins

VP of Marketing (B2B) @ Vimeo



Jaleh Rezaei

Founder @ Mutiny



Heidi Cerenzia

VP of Demand Generation @ Wrike

What is alignment? It's a constant activity.

“

My calendar is slammed. I don't want more meetings. I'm not a meeting guy. But I have to have these conversations even if it's just a personal check in to make sure we're on the same page, working together, and getting stuff across the finish line.

True alignment is you as a marketer agreeing to end up with a calendar during the week that looks like a Tetris game that you're essentially winning.

For team alignment, It is meeting, meeting, meeting. It's not a quarterly check-in, its true alignment on a personal level to ensure that you have cohesion among the organization to get everything in play that you need to deliver cohesive experiences.

”

[Introduction: What is alignment? It's a constant activity.](#) [Go back to Table of Contents.](#)

We're not going to waste your time with a 1-page explanation on what team alignment means. If you're reading this handbook, chances are you already know the "what".

You're reading this because you want to know what alignment actually entails, what it takes to truly align teams and most importantly, how to communicate team alignment. This is where Venngage and our expertise in [visual communications](#) comes in.

In this handbook, you'll learn not only tactical ways top leaders align their teams but you'll walk away with actionable resources and visual tools to help you communicate alignment.

A special thank you to our friends at [Growth Marketing Conference](#) for providing us amazing speaker sessions from their past conferences. This handbook wouldn't exist without them.

– The Venngage Team



Create infographics at venngage.com

Chapter #1: On instilling an agile mindset across your team

In this chapter, you'll learn why an agile team is an aligned team. At the end of the chapter, we share some actionable steps you can take right now to infuse agility into your teams.

“

There are two main schools of thought when it comes to project management and marketing: agile or waterfall.

Agile is a philosophy designed for context where it's hard to predict the future and address that by taking an iterative approach to validated learning.

This means that we run a small test (an MVT), while still validating direction. If we get validation, we do more. If we don't, we try something else.

”

Chapter #1: On instilling an agile mindset across your team. [Go back to Table of Contents.](#)

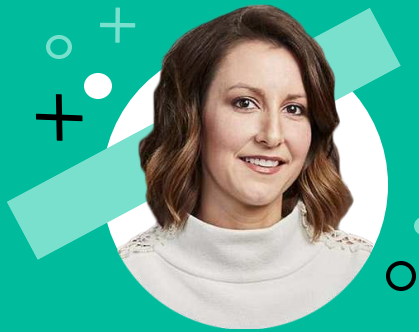


Sarah Fruy

Director of Brand &
Digital @ Pantheon



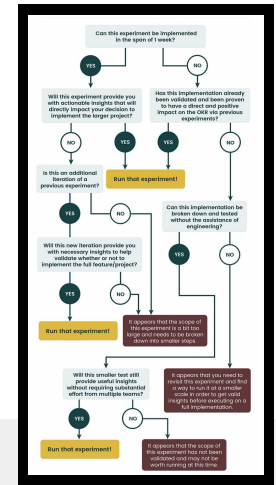
Design Tip



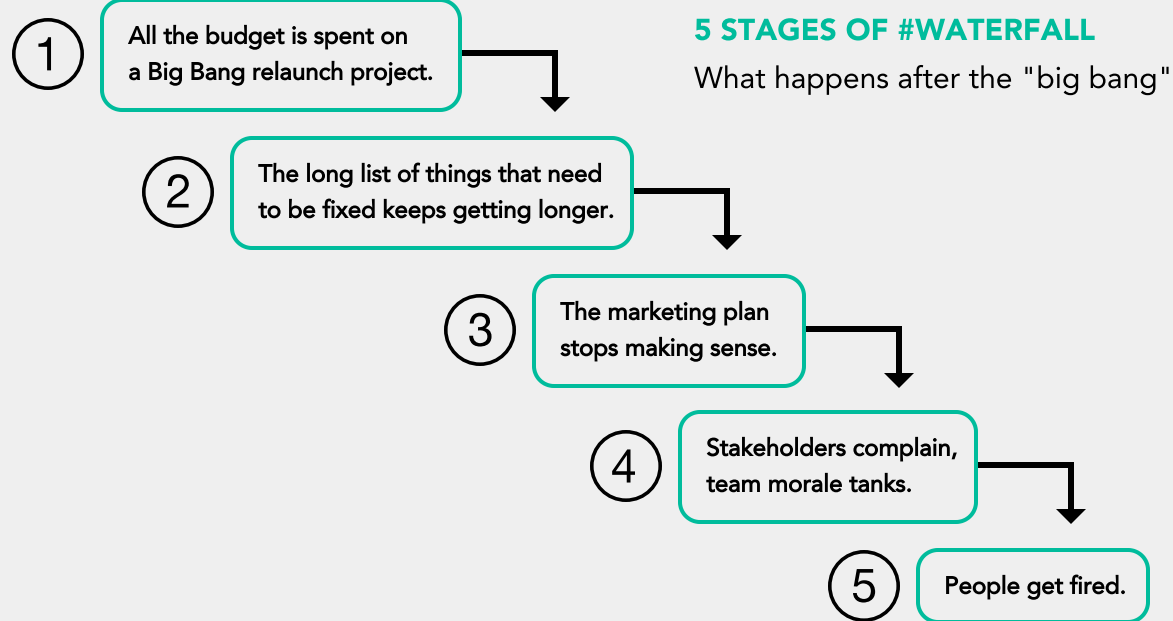
Sarah Fruy
Director of Brand & Digital @ Pantheon

Break down large releases into smaller ones by creating an MVTs (minimum viable tests). Here's an MVT experimentation board that can help you ideate, prioritize and execute minimum viable tests:

[Click to view full template](#)



Waterfall, on the other hand, is the measure twice, cut once approach. And it fails more often than not in rapidly-changing markets. Most annual marketing plans are out of date in less than a quarter. The result? A few high-risk big bang releases.



“

Adopting agile means transitioning from a world of a few big releases to a world in which you make many small releases. By quickly delivering many small releases you fundamentally reduce the risk of any individual release. The result? Many smaller low-risk releases that validate direction while quickly delivering small wins.

In fact, agile teams are 2x likely to succeed.
And they do so by having measured goals.

”



Sarah Fruy

Director of Brand & Digital @ Pantheon



Design Tip

When it comes to planning and executing projects in an agile manner, scrum is the most common methodology used. Here's an example of what an agile scrum board looks like. You can go ahead and customize this template:

BACKLOG	TO DO	IN PROGRESS	REVIEW / QA	DONE
Translating landing page to Spanish	Publish content section	Make payment mode more visible	Fix discrepancies with tool	Updating tags for tracking
Researching business users	Publishing pricing page	Implement team event	Release new business onboarding	Upgrade student capabilities
Equipment for Q4	Add new category	Equipment premium plan	Enable tracking	
	Add new illustrations	Publishing pricing page		
	Update user request sheet			

[Click to view full template](#)



Camila Kaul

Head of Sales Dev &
Strategy @ Google

“

For me, growth is made of two major elements: speed and thoughtfulness.

You've got to be thoughtful about your next steps by provoking your brain to think differently and not the way you've always thought. And then speed. Speed means are you willing to test? The faster you can iterate, test, prove this may or may not work – the better you'll be in the long term.

Creative thinking allows you to do both of those things:

- Tapping into your brain's potential and thinking differently about the problems you're trying to solve.
- It gives you a very simple and easy roadmap for at least testing your ideas.

Your tests don't have to be super in-depth. Just by conducting a survey, running a panel, or talking to a few of your customers – this will allow them to start being agile and grow. Creative thinking is a powerful mechanism to get out of stuck mode and into creator mode.

”

“

Instead of building the perfect thing or coming up with the perfect plan, I think the best thing to do is to ship it! You want to ship it within 1-2 weeks. Two weeks being the maximum amount of time you want to give yourself to ship it.

Have you ever tried pushing a big box? When you first start pushing it, It's really difficult but as soon as it starts moving, the box gets significantly easier to push. This isn't an illusion – static friction is higher than kinetic friction. I think this analogy works similarly for people and teams that are executing on programs. Once they are set in motion, everything happens a lot more easily.

It's hard and uncomfortable to do new things, leading to months of planning in isolation to “get it right.” The most effective way I deal with this is to give my team “motion goals.”

Motion goals get you out of your basement and into the real world to start doing things that get you the impact you want in your program.

”



Jaleh Rezaei

Founder @ Mutiny

“

Examples of bad (static) goals:

- Build a list of partners and do TAM analysis.
- Research other programs and design our partner program deck.

Good examples of motion goals:

- Sell the program to 1 partner this week.
- Book 1 customer meeting through a partner this week.

”

Here's a visual tool to help you measure the overall impact of the tests and experiments you're launching. This marketing checklist can help you prioritize the most high-promising tests so you focus on what moves the needle:

[Click to view full template](#)

Marketing Sprint Validator
Use this table to measure overall impact of experiments

What is the experiment you are pitching for this sprint?
Email new cohort of users who have completed 80% or more of their project to push to create a new project.

JOB TO BE DONE	PERSONA	CHANCE OF SUCCESS	EFFORT	ONCE IMPACTED
<p>Prioritize People who want to pitch an idea but aren't sure how to do it.</p> <p>Manage People who want to manage projects more effectively.</p> <p>Organize People who want to research all of their projects in one place.</p> <p>Complete People who want to complete their projects in a given time frame.</p>	<p>Marketter</p> <p>Executive</p> <p>Product Manager</p>	<p>HIGH</p> <p>MEDIUM</p> <p>LOW</p>	<p>LOW</p> <p>MEDIUM</p> <p>HIGH</p>	<p>Acquisition</p> <p>Activation</p> <p>Retention</p> <p>Referral</p> <p>Revenue</p>

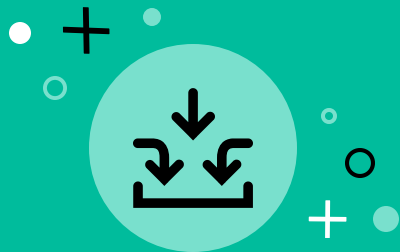
StartupMasters VENNGAGE



Jaleh Rezaei
Founder @ Mutiny



Design Tip



Takeaways

- **Agile > Waterfall.** By delivering many small releases quickly, you reduce the risk of any individual release going wrong. Also, agile teams are 2x likely to succeed.
- **Growth = thoughtfulness + speed.** Can you think differently and test fast? The faster you can test, the luckier you can get.
- **Set motion goals.** Static goals keep you in the basement. Motion goals get you out in the real world to start doing things.
- Visual roadmaps, gantt charts, and project plans can help you fast-track planning, execution of complex projects, and prevent the dreadful waterfall.



Resources

[Growth Strategy: 5 Templates To Help Plan Your Business Goals](#)

[How to Communicate Strategy To Your Team Effectively](#)

[How To Create a Product Roadmap \(Product Roadmap Templates\)](#)



Tools

[Marketing Roadmap
Templates](#)

[Project Plan
Templates](#)

[Gantt Chart
Templates](#)

Chapter #2: On the role culture plays in aligning teams

In this chapter, you'll learn about the role culture plays in building winning teams and how to build (or improve upon) your company culture.

“

I get a lot of exposure to different types of marketing teams (a lot of successful ones too) and I always get this question from CMOs, CEOs, and folks in marketing, “What are the winning tactics? What channels should we look at?”

I think it's fine to keep an eye on the latest and greatest within growth. In my experience, however, tactics are actually a byproduct of the real driver: the culture of the marketing team.

Winning marketing teams tend to have a culture and unique characteristics that consistently leads to great tactics that work.

”

Chapter #2: On the role culture plays in aligning teams. [Go back to Table of Contents.](#)



Jaleh Rezaei
Founder @ Mutiny

“

But, how do you define excellence in marketing? There are a lot of cultural characteristics of marketing teams that lead to excellence. Some common ones are:



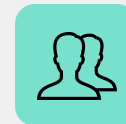
Structured thinking



Results oriented



High quality



Great team

But in my experience, speed is the single most important attribute of a winning marketing team.

You want to make sure you're a little uncomfortable, because that means you're moving fast enough. There should also be moments where you cringe and that's okay!

Mistakes are a critical part of being fast. If nothing ever goes wrong, it means you're not learning fast enough.

”



Jaleh Rezaei

Founder @ Mutiny



Melissa Matlins

VP of Marketing
(B2B) @ Vimeo

“

Culture, to me, is very dependent on size. Once you get to a team of 500+ people (depending on how distributed your team is), everybody's attention will turn from building the company culture to building the culture of the team.

What you end up with is micro-cultures where your team may have specific dynamics that don't look like the rest of the company. But that's just a function of scale and size. If you're finding pods of isolation in teams smaller than 500, overall as a company – that can often come back to goal-setting.

I often find that if the strategy and goals aren't clear in smaller companies, the culture will reflect that.

With respect to transparency, I keep my goals and my team's goals public. This helps reinforce not only the numerical part of our goals, but also what each of us need to work on from a personal development perspective.

”

“

If you're a manager (or leader), your focus should not be on doing more work. Rather, your focus should be improving what's already working and figuring out new strategies for growth.

By building a growth-minded and autonomous team, you eliminate the bottleneck problem (you) and help pave the foundation of a company that has the potential for very long-term growth. In other words, you need to learn how to delegate. But before you attempt any form of delegation, you need to set the right expectations with your team. Here's one way:

Identify and define your core values. Your core values are the backbone of your business and team.

If every person on your team is not embodying your core values through and through, you'll not only have a shaky culture but effective growth is going to be really hard to accomplish.

”



Nadya Khoja

Chief Growth Officer
@ Venngage



Design Tip

An onboarding manual will tell new hires everything they need to know about your company – especially your core values. Don't have a visual onboarding manual yet?

Make this one your own:

[Click to view full template](#)



“

Buffer, Amazon and Spotify can help you get a better idea of how to decide which core values to set and are also inspiration on good core principles from high-performing companies. **At Venngage, we have five core values:**

We own our jobs.

We win together, we lose together.

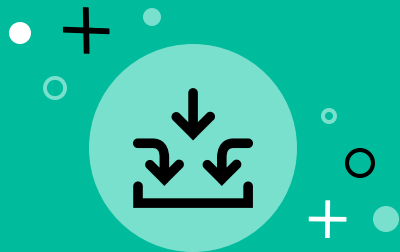
We reflect plan and act.

We keep learning and improving.

We put customers first.

As long as you find people who embody and reflect your company's core values (and push others on your team to do the same), you won't need to hire people with years of experience. Eventually, you'll find yourself with a strong team of motivated A-players and a company that keeps on scaling. Because, if people keep growing, chances are your company will grow too.

”



Takeaways

- **Speed above all else.** Winning marketing teams have plenty of unique cultural characteristics, but speed trumps them all.
- **Your culture is dependent on size.** If you find pods of isolation in teams smaller than 500, your strategy and goals are probably not clear enough.
- **Define your core values.** They're the backbone of your business and will directly dictate the kind of employees you hire and indirectly, your business growth.
- **An important component of building winning teams is onboarding.** Employee manuals and onboarding checklists can help set the right tone for incoming hires, resulting in faster onboarding and core value alignment right out of the gate. Learn how to create (or streamline) your onboarding process (below).



Resources

[Busting 8 Common Company Culture Myths \(Infographic\)](#)

[How to Make an Infographic in 5 Steps \(Guide\)](#)

[11+ Tips for the Best Employee Onboarding Process](#)



Tools

[List Infographic
Templates](#)

[Employee Handbook
Templates](#)

[Work Checklist
Templates](#)

Chapter #3: On goal-setting to align teams

In this chapter, you'll learn the role goal-setting plays in creating aligned teams, along with actionable ways you can set the right team and company goals today.

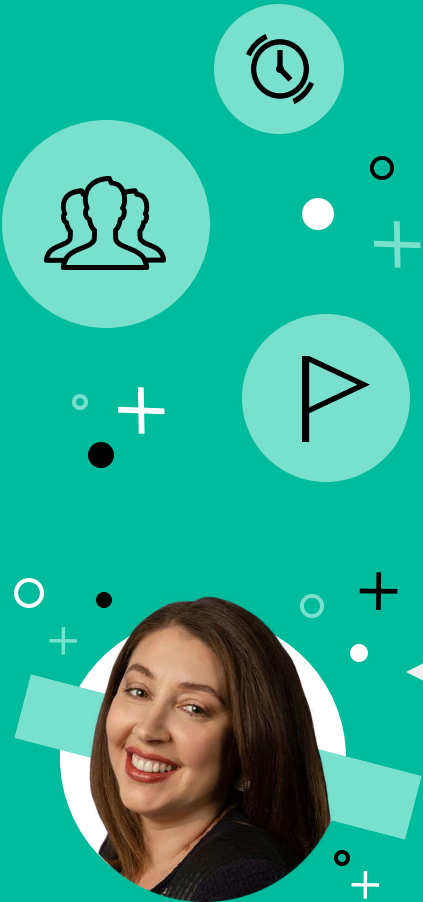
“

As your team evolves, I'm a big fan of writing out what I call "team narratives." This helps a ton with goal setting. I'm not talking about an org chart. **A team narrative is a natural story about how your team will hit a specific goal, what that looks like, and how that may evolve your team over time.** Here's the basic structure I follow: the job to be done, the people that are going to do it, the experience (what that's going to look like), whether or not there's a growth component (what your team will learn, how that might evolve their skill set if they're successful).

If you want to grow a new business pipeline from SEM, what does that look like? Do you pair people on the team to get different capabilities working together? Is there team movement that you need to build in where one's interested in exploring a new role? And through goal achievement can you create a structure for them to safely do that?

”

[Chapter #3: On goal-setting to align teams.](#) [Go back to Table of Contents.](#)



Melissa Matlins

VP of Marketing
(B2B) @ Vimeo



Design Tip

While org charts have their place, if you'd like to set human-centric goals, customize this business strategy template. Replace the strategies by the job to be done and people who are going to do it:

[Click to view full template](#)



This, for me, is the human-centric model of goal setting. Numbers, of course, are critically important. But, this is generally where most companies stop. Big pieces like “what’s it going to take them to get there?” and “how are they going to do it?” get left out when you only set numerical goals.

To conclude, when setting goals I like to combine:

- The numbers.
- The activity (by individual contributor).
- What it’s actually going to take for them to get there?
- What does this look like in their day-to-day?
- Do they need to learn anything to achieve this goal? (hard or soft skills)



Melissa Matlins
VP of Marketing
(B2B) @ Vimeo

“

One strategy for integrating speed into your marketing programs is by breaking down large problems in a 90 minute meeting. You should do this when you're testing new channels or launching new programs.

In this meeting, sit down with the team (that's working on the new program) to define what the program means and uncover all the unknowns. You also need to define one big inspiring problem statement (and success metric).

And you want this to be really inspiring for your team. For example: In one year, we want to have 1 million blog subscribers. Or, In one year, we want to have 5,000 partners selling our product to their customers.

DEFINE GOAL

One big problem statement + success metric (1 year)

BLACK HAT TECHNIQUE

We failed. What went wrong?

- Problem 1
- Problem 2
- Problem 3

WHAT MUST BE TRUE – KEY LEVERS

List of hypotheses & metrics:

- Hypothesis 1 & metric
- Hypothesis 2 & metric
- Hypothesis 3 & metric

”

“

At this stage, everyone on the team tends to take a monolithic view towards this statement. They bring up questions like:

- **How do we make this happen?**
- **What does the program look like?**
- **How can we build a timeline to start executing on it?**

The reality is that your problem statement is actually a composite of hypotheses that you may or may not be right about. Which is why I recommend breaking down this big statement with what we call the “black hat technique.”

What is the black hat technique? You fast forward to the end of the timeline you set for yourself. Let’s say you wanted to get 5,000 partners by the end of the year. Let’s also assume that we failed at our goal. What went wrong?

This technique switches people from an optimistic mindset to triggering their problem solving – so they can start identifying all the unknowns and things that can go wrong. Along with your team, come up with 5-10 unknowns. Usually big programs have at least five major unknowns that form a mutually exclusive, collectively exhaustive list of assumptions.

”



Jaleh Rezaei

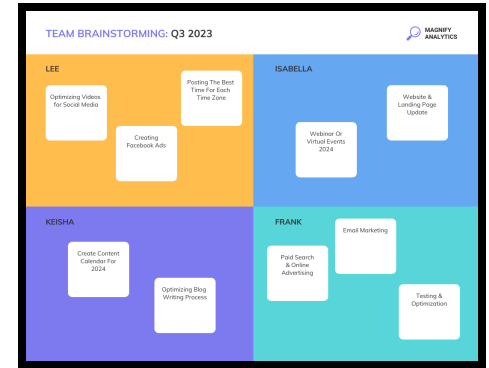
Founder @ Mutiny



Design Tip

For effective brainstorming, try using this visual collaboration board. Come up with fresh ideas, identify any unknowns, and more in your next team meeting:

[Click to view full template](#)



To make it easily understandable, I flip them from negative to positive statements. Instead of saying “there weren't enough partners in the market”, we’d say “the market is large enough and there’s enough partners within our ideal profile that we can go after.” I also recommend attaching a metric (so there’s no ambiguity). Example: There’s at least 50,000 partners in the market. If you can get a 10% penetration rate, you can hit your 5,000 goal.

Once you get past this step, everyone has this x-ray vision into the program and that’s really important for staying fast. Because now you know what all those levers are and you can navigate a lot more quickly. This method can also be used as a framework to start planning what to focus on in the next quarter. It gives your team great strategic understanding that a lot of folks designing big programs don’t possess. You’re already many steps ahead of the rest of the market.





Design Tip

This roadmap helps you set one, three, five, and ten years goals plus actionable steps required to hit those goals:

[Click to view full template](#)



Set specific, yet broad expectations. What this means is that you set clear goals which your team can work towards achieving. But you're keeping these goals broad in the sense that you're not showing them exactly how to achieve them.

With goal setting, you provide the what and why. Your team needs to figure out the how.

This is where it becomes important to set ambitious stretch goals based on trends from previous years (or months) so you can set a realistic baseline for your goals.

Your job as a leader then, is to provide guidance on figuring out how to roadmap the process for achieving those goals so your team can execute on said roadmap.



Nadya Khoja
Chief Growth Officer
@ Venngage

“

From the previous example, maybe you identify certain actions within your product that correlate with better retention. You may want to set specific goals around that action.

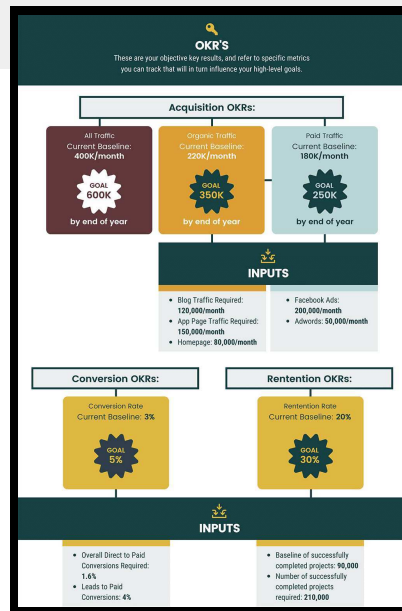
For example: Increase use of widget/feature X from 50% to 70%. If the use of that particular widget/feature increases by 20%, it will contribute to the increase in overall retention numbers.

No matter what your overarching goal is, identify the leading indicators (new inputs) for your goals and set new ones around these indicators (inputs) that your team can focus on.

”

How do you break down bare goals into inputs?
Here’s a customizable business report template with OKRs being the main focus. Visualizing goals can give you the needed clarity and focus to hit them:

[Click to view full template](#)



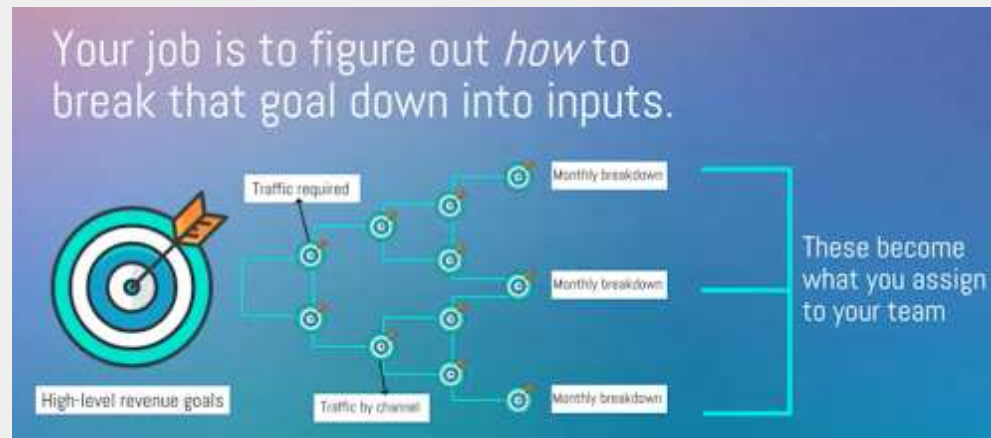
Nadya Khoja
Chief Growth Officer
@ Venngage



Design Tip

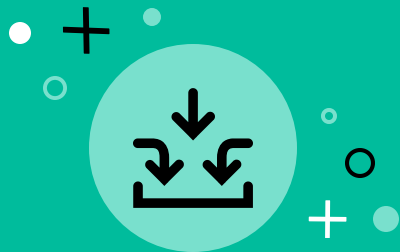
“

At Venngage, our marketing goals are usually tied to acquisition. There's a total volume of traffic that we need to hit in order to achieve our revenue goals. This means that for us, traffic is an input of revenue. But even that is too broad. I can break that number down by looking at traffic from different channels and continue breaking it down even further into monthly or weekly goals. I keep going further down the line until it looks something like this:



The third and fourth layer is where I've identified the monthly metrics for the channel in question. This is what I can assign to my team as a goal that to go after. These goals are specific enough for them to wrap their heads around and still correlates with our bigger, broader goal. This creates ownership and enforces accountability within your team which is going to help them move towards being more autonomous and growth minded.

”



Takeaways

- **Create a team narrative.** Numbers are important, but also consider how your team is going to hit their goals and what it's going to take them to do that.
- **Break down large problems.** Scope large marketing programs, uncover unknowns and define one big inspiring problem statement (and success metric).
- **With your goals, avoid ambiguity.** Break down big goals into relevant and comprehensible inputs to make it easy for your team to hit them.
- Tools like timeline, roadmaps, gantt charts, etc can help you not only set visual goals but also provide a clear blueprint for your team to execute on.



Resources

[How to Use Visual Communication: Definition, Examples, Templates](#)

[40+ Timeline Template Examples and Design Tips](#)

[30+ Product Roadmap Templates, Examples and Tips](#)



Tools

[Timeline Infographic Templates](#)

[Project Plan Templates](#)

[Marketing Roadmap Templates](#)

Chapter #4: On structuring and running meetings

Meetings get a bad rep and for good reason. They often lack clear agendas, next steps, and are sometimes plain boring. Here's how top growth leaders run their team meetings.



To continue on the topic of building a fast team that's learning quickly, what I find to be really effective is a **bi-weekly learning meeting**.

The goal of these meetings is to encourage and codify learnings across your team. Usually you would have your entire marketing team in attendance. But, it's also a great session to attend for teams that work with marketing.




Want to run meetings where everyone gets to the point? Here's a team meeting template that can help make your next meeting less boring:

[Click to view full template](#)

Chapter #4: On structuring and running meetings. [Go back to Table of Contents.](#)



Jaleh Rezaei
Founder @ Mutiny


Design Tip

“

It's a simple format where we're trying to get to consistency in execution so the team knows what to look for. When a team has something to share about their program, they would join the meeting, we'd have a google doc that contained all of our learnings. It was also a great way to onboard new people to the team as well.

Good format:

- Hypothesis: we predicated that _____
- Test: designed the following test to see if true
- Learning: we learned that _____.

Contextualize using the program goal + core levers.

In other words, we believed X, so we constructed test XYZ to validate that. And here's what we learnt as a result. For example, to continue with our partner example from earlier: we believed that through a revshare model we could create a really meaningful economic incentive for partners to join our program. So we created a 50% discount (which is the most revshare we can offer) and we ran that by five partners. They told us that this amount of money is really small relative to the revenue they make every month. We learned that this revshare model is not going to be a major driver. But, we also learned that they're really interested in building their own services model on top of our product so they can monetize higher. They're also interested in passing a discount directly to their customers. So that's how we're going to pivot this program.

”



Jaleh Rezaei

Founder @ Mutiny



Design Tip

Weekly learning meetings are a great place to share experiment results, wins, losses, and to determine next steps. Here's a roadmap template your team can use:

[Click to view full template](#)



These tests don't always have to be these statistically significant A/B tests – qualitative learnings are just as important. But even when you're doing qualitative, you still want to be analytical about it. Which is why we have this hypothesis, test, learning format.

This is where usually these hypotheses line up cleanly with the core hypothesis of the program. It's a great way to go back, focus on the different levers, and elicit ideation from the whole team. If you have a large team, usually they're not in the weeds of every single program. This format surfaces the crux of the issue in a way that any smart person can be helpful to their peers without needing a ton of context. It's also a great way for everyone to have a deep understanding of what's going on in your organization and the different programs you're testing.



Chapter #4: On structuring and running meetings. [Go back to Table of Contents.](#)



Jaleh Rezaei
Founder @ Mutiny



Camila Kaul

Head of Sales Dev &
Strategy @ Google

“

When we think about innovating and coming up with new ideas, the first thing everyone thinks about is conducting a brainstorming session. The problem that we face and I've seen a lot of teams doing this is that we don't necessarily know how to run or drive a successful brainstorming session. A brainstorming session is the moment where we need to not only allow all ideas to be heard but also to be prepared.

In a good brainstorming session, **the first key component is to be really expansive and signal that to your team.** Which means everything goes, you can come up with any ideas and we're not going to judge. Instead, we're going to nurture those ideas.

The second component is to give each person a moment to reflect. It's hard to come up with ideas when everybody is trying to say something. Pose a question, give your team some time to reflect and allow them to write down their thoughts on a post-it (or piece of paper) and paste it on a whiteboard. This will allow for all the different ways in which your team thinks to be contemplated as part of diversity of thought.

Finally, a good brainstorming session always has some type of outcome. It doesn't have to be the final decision or the perfect solution. But we do have to come up with next steps, or a prototype, or a test we want to run.

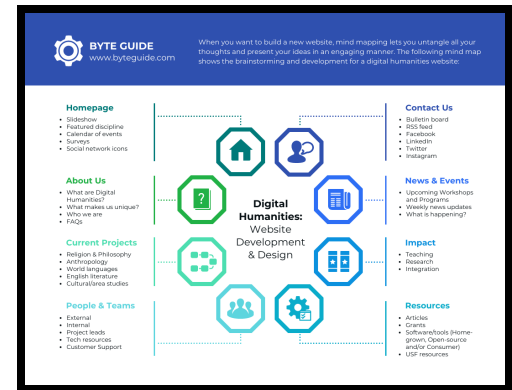
”



Design Tip

Mind maps are extremely powerful for brainstorming and organizing your ideas. Here's a strategy mind map that can aid in effective brainstorming:

[Click to view full template](#)



“

Just make sure that at the end of the session, there's a moment for reductive thinking. Which means that from all the ideas on the whiteboard, your team identifies the top 2-3 ideas that they really want to move forward with, explore further, or test.

Above all, keep it simple. Even a couple of minutes at the beginning of each team meeting works. Pose a good question and for the next five minutes, ask your team to think of a solution to the problem you're facing. Just for five minutes, allow your team to think of the weirdest, craziest ideas they can think of. This way they can generate solutions that they haven't thought of for that particular problem.

This helps condition your team to think differently for the rest of the meeting. It's just about massaging your brain and giving it enough food so that it's willing to think differently later on.

”



Camila Kaul

Head of Sales Dev & Strategy @ Google

“

Firstly, this may seem obvious but consistent and clear communication is a must. Shockingly, your employees cannot read your mind. Sometimes we also fall into the “knowledge bias”. We tend to assume that the people we’re communicating with already have a general understanding of the concept or idea we’re trying to express.

You can assure that you’re communicating clearly by having frequent 1-1s with each person on your team and having a structured system for giving or receiving direct and specific feedback. Let’s talk in-depth about structuring your 1-1s. Now, organic conversations with your employees should naturally happen throughout the week. But there needs to be an opportunity for structured 1-1 time with each employee.

This is an opportunity where you get a better idea of what each person is working on this week, how that ties back to your company goals, give or receive clear and constructive feedback, but most importantly, learn about struggles and worries your employees may be facing.

I’ve put together a [Trello board](#) which includes specific 1-1 questions you can ask your employees today. It also includes an explanation for how to measure each employee’s progress week over week. It’s set up on a four week basis so you can track if they’re improving over this period of time.

”

Chapter #4: On structuring and running meetings. [Go back to Table of Contents.](#)



Nadya Khoja
Chief Growth Officer
@ Venngage

“

Secondly, you need to provide resources for continuous improvement. A growth-minded and autonomous team is one that's constantly moving towards betterment. Naturally, in order to provide said resources, you need to practise continuous improvement yourself. One of the ways I learn best is by talking to people who are succeeding at what I want to be doing. It only makes sense that my team should be learning by talking to other people too.

So I introduced the concept of growth interviews as part of a monthly or bi-monthly requirement in our meetings.

Here's how to setup growth interviews with your team:

- Let your team know that you'll be having a knowledge sharing meeting (in two weeks).
- By this time your team should reach out to somebody who's a really good marketer, UX designer, product manager, etc.
- Interview them about a specific process. Ideally one you're working towards implementing or improving within your own company.
- Share your learnings with the rest of the team in your meeting.

”



Nadya Khoja

Chief Growth Officer
@ Venngage



Nadya Khoja

Chief Growth Officer
@ Venngage

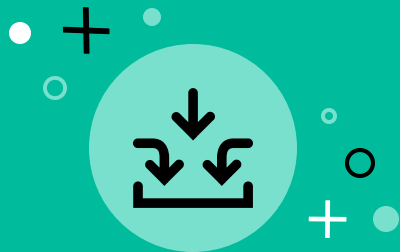
“

The goal here is not only to learn only from that person's experience and apply those learnings to your own work but to also build up a strong network of like-minded people.

Eventually what will happen is that your team will start reaching out to these experts on their own time, or attend meetups, or seek out other resources to improve themselves. The end result is that your team members will have their own network of peers/mentors to draw information from.

When we surround ourselves with like-minded individuals working towards similar goals, we're more focused and interested in the growth we're trying to realize.

”



Takeaways

- **Encourage and codify learnings.** Have bi-weekly learning meetings with your team to get to the crux of issues arising in tests (and programs) you're running.
- **Brainstorming works, if done right.** Allow your team to be expansive, give them time to reflect (quietly), and become reductive at the end (pick the top 2-3 ideas).
- **Always be learning and improving.** A growth-minded and autonomous team is one that's getting better each day.
- Mind maps are powerful tools that can facilitate brainstorming, boost creative thinking and turn loosely-held ideas into concrete strategy. Learn about mind maps (below).



Resources

[50+ Essential Business Report Templates](#)

[Venngage – Design Professional & Engaging Presentations](#)

[40+ Amazing Mind Map Templates You Can Use Now](#)



Tools

[Marketing Report
Templates](#)

[Marketing Roadmap
Templates](#)

[Mind Map
Templates](#)

Chapter #5: On keeping your team connected and productive

Team connectivity and productivity are yet another key tenet of team alignment. This section dives deep into tactics top leaders use to keep their teams on the same page.

“

You came up with the program, you spent two weeks executing on it, getting out there, and experiencing it for yourself.

Now, as a leader, you need to create a little bit of structure around the way that your team executes on programs (or tests) every week. What I recommend is coming up with weekly targets and some sort of dashboard that communicates how they're doing.

I tried many versions of goal-setting and different ways of giving my team guidance. What I find works best is if you take your quarterly goal and make it one consistent weekly goal.

”

Chapter #5: On keeping your team connected and productive. [Go back to Table of Contents.](#)

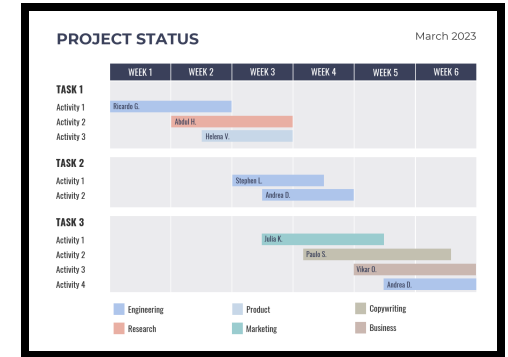


Jaleh Rezaei
Founder @ Mutiny



Design Tip

After determining your quarterly goals, map out all the projects (or tasks) that need to be completed on a weekly basis. Here's a gantt chart template that can work in this instance. Swap out the departments with members on your marketing team and you're all set:

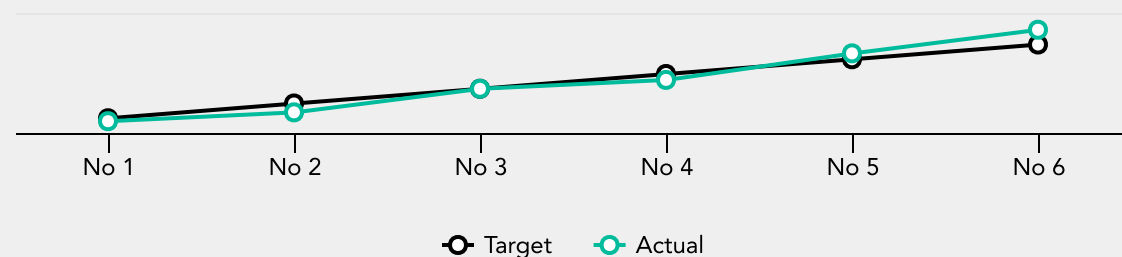


[Click to view full template](#)



That creates the best execution rhythm for your team because they don't have to constantly think about what their goals are or what they're trying to achieve each week. You can eliminate this layer of ambiguity. For example, if your goal is to get 12 partners in one quarter, that's one partner per week.

I pick goals that are furthest down the funnel but can still be impacted every week. In your dashboard, you want to always have the actual vs. the target goal.



“

The difference between actual vs. target is a really important part of your dashboarding because that's what ends up driving your team forward. If you can achieve these two simple things, it will end up being all that your team needs to be able to self-manage and problem-solve on a daily basis in order to hit their goals.

This shifts the conversation from, "What's happening in this program?" to having a clearer view where you can talk about what's working, new tactics we want to try (based on how hard it was to meet the goal last week) with your team.

”

To save time, you can create a template and update it periodically by versioning and re-using the same design. Here's a template you can use for dashboarding and sharing project updates:

[Click to view full template](#)



Jaleh Rezaei

Founder @ Mutiny



Design Tip

“

One of the main causes of the “bottleneck problem” stems from a need for control. The most difficult part of delegating to other people on your team is a fear of trust. As a leader or manager, you need to let go of complete control. Your only goal is to help your team get better at their jobs than you used to be (at that job.)

Yes, there’s a risk of someone else failing or making an unavoidable mistake. But, that’s necessary for building a growth-minded and autonomous team (as we touched on earlier.) **You need to let your team make mistakes and learn from them.**



If you’re constantly holding their hand or fixing their problem, they won’t make any mistakes but they also won’t learn anything. And it will definitely not solve your “bottleneck problem” as a manager or leader.

”



Nadya Khoja
Chief Growth Officer
@ Venngage

“

Next, you need to document and improve every process. Although, this may seem unnecessary in the early days – it’s really important to continuously be working on your “playbook”. This is the in-depth guide of all the processes you’ve got in place. This is also documentation that you give new hires as part of their onboarding process.

This is what a snapshot of the ~200 page Venngage marketing playbook looks like.

This is an ongoing playbook that you need to keep improving. Once you document something, pass that process along so everyone else can execute what you’ve already figured out. Now, you can figure out the next thing and so on.

Think of this playbook as the manual for the growth machine you’re trying to build.

[Part 1: Email](#)

- a. [Drip Campaigns](#)
 - i. [Segmenting Users](#)
 - ii. Campaigns and Filters
 - iii. Tagging
 - iv. Zapier Integrations
- b. [CTAs and Tracking Codes](#)
- c. Upgrade Nurture Campaign
- d. [Weekly Newsletter Emails](#)
- e. [Email Newsletter Checklist Before Sending](#)

[Part 2: Venngage Blog Guidelines and Best Practices](#)

- a. [Blog Content Strategy](#)
- b. [Updating Existing Content](#)
- c. [Blog Style Guidelines](#)
- d. [Blog SEO Checklist](#)

[Part 3: Category Landing Pages](#)

- a. [Category Landing Page Strategy](#)
- b. [Keyword Research for Category Landing Pages](#)
- c. [Accessing the Landing Page Admin Tool](#)
- d. [Category Landing Page Structure](#)
- e. [Scheduling Design Assets](#)
- f. [Publishing Category Landing Pages](#)
- g. [Internal Linking to Category Landing Pages](#)
- h. [Scheduling Landing Page Outreach](#)



Nadya Khoja
Chief Growth Officer
@ Venngage

”



Design Tip

If you want to keep it bare-bones, a Google Doc will work just fine. But if you want to add some visual flair to your marketing playbook? Customize this eBook template that can also double as your teams growth manual:

[Click to view full template](#)



Eventually, it'll become harder to know everything as your team scales. So as your team becomes autonomous and specialized, get them to write specific parts of the playbook for you. By getting them to write the playbook, not only are you reinforcing their knowledge, you're also alleviating some of the work for you. Not only that, this practise allows you to plan for the future. If ever at some point somebody decides to move on from the company, the business will continue thriving since your manual will always be available for others to reference.

You're constantly improving on what you already have. This helps every new member coming into the company become smarter and instantly aligned the second they start.





Heidi Cerenzia

VP of Demand
Generation @ Wrike

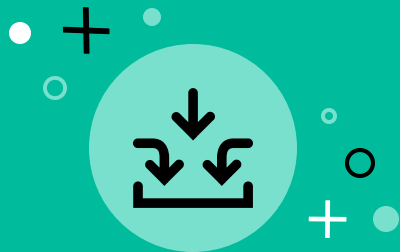
“

Our entire team is now remote so in order to bring back the missing human element, every Friday we have a 30 minute coffee talk. The only rule? You can't talk about work.

We try to mix up too, we even had happy hours once. We're all moving in a thousand directions and while we have our tool to keep us on track – these things help instill a human element. We regularly check in with our team to see how they're doing. We talk about their kids, dogs, and things that are important to them. This prevents that robotic feel and brings a balance to the team so they talk about themselves.

It's important for managers to stay connected to team members. I know we have Zoom fatigue, but it's crucial that you see each other face-to-face as much as you can (virtually of course.) I encourage managers (and even team members) to hop on a zoom call, take a walk with one another, and give yourselves a break from the day's monotony. I think that's really helped our teams at Wrike to stay connected.

”



Takeaways

- **Turn your quarterly goals into weekly goals.** This creates the best execution rhythm for your team and eliminates ambiguity around goals.
- **Keep working on your marketing playbook.** This is the go-to manual for the growth machine you're trying to build.
- **Reignite that missing human element.** Everybody's moving in a thousand directions, have regular check-ins with your team to see how they're doing.
- Communicating complex ideas or company processes with visuals like diagrams, checklists, process infographics, etc can help your team grasp new ideas quickly. Learn why visual communication is important (below).



Resources

[10 Tips for Effective Communication With a Remote Team \[Templates\]](#)

[How to Use Visual Communication: Definition, Examples, Templates](#)

[How to Communicate Strategy To Your Team Effectively](#)



Tools

[Process Infographic
Templates](#)

[Diagram
Templates](#)

[Work Checklist
Templates](#)



Final thoughts

I hope this handbook gave you actionable strategies, frameworks, and models you can use to align your teams (and the larger company) today.

Ari hit the nail on the head when he said, “Team alignment is a constant activity.” Team alignment is one of the biggest growth levers you can pull to not only get shit done in the short term, but to drive exceptional business outcomes in the long term.

Need help aligning your team on processes, communicating strategy, and reporting on results? Create infographics and more with [Venngage](#).

Want to learn actionable growth strategies and tactics from the world's best marketing and product leaders? Subscribe to [The One Growth Show Podcast](#) on iTunes.

About GMC

Growth Marketing Conference is the leading, globally-focused event for B2B and B2C growth marketers. We host world-class thought leader speakers and workshop instructors to teach the actionable, no-nonsense growth strategies and tactics that drive rapid, cost-effective, and sustainable revenue and user growth – in 2021 and beyond. Their sessions are attended by the best and brightest in the growth marketing world (think Uber, Amazon, Netflix, Dropbox, Slack, etc.). GMC's events cover topics like customer lifecycle marketing, B2B & enterprise growth, product innovation and more. To learn more about GMC, visit growthmarketingconf.com.

About Venngage

Venngage is an all-in-one design platform that helps businesses communicate complex, boring and technical information, visually. Whether you're visualizing complex data, mapping a process or marketing your business, easy design starts with Venngage. Learn more at venngage.com.

About the author

Aditya Sheth leads growth at Venngage where he spends his time writing actionable content and running growth experiments. Outside of work, he enjoys reading nonfiction, listening to rap or scrolling through his Twitter feed. Tweet him [@iamadityashth](https://twitter.com/iamadityashth).

Designed by Luiza Bibire. Edited by Sara McGuire, Bronwyn Kienapple, and Jeilan Devansean.
Co-created in association with Growth Marketing Conference.

