Do This First

A Prioritization Workbook for Marketing Leaders

"It is not enough to be busy.
So are the ants. The question is:
What are we busy about?"

—Henry David Thoreau

It's the best and worst time to be a marketing leader. So many choices and opportunities. And on the flip side, more pressure than ever. And the demands of the day-to-day are relentless.

The fact that you're reading this means you've decided to take some action to manage the onslaught of meetings and to-do's. It probably means you or your team are feeling some of these things:

- The workload is getting hard to manage

- Everything is a priority

- It's not completely clear how all this activity is having an impact against goals

- It's difficult to assess new opportunities … is this worth doing?

Here's the good news … There's a better way. And it's not that difficult. This guidebook will lay out an overall approach to prioritization and provide some tools and frameworks you can choose from, depending on the specific need in front of you.

This isn't about theory alone. This workbook is designed not just to be understood, but also to be used.
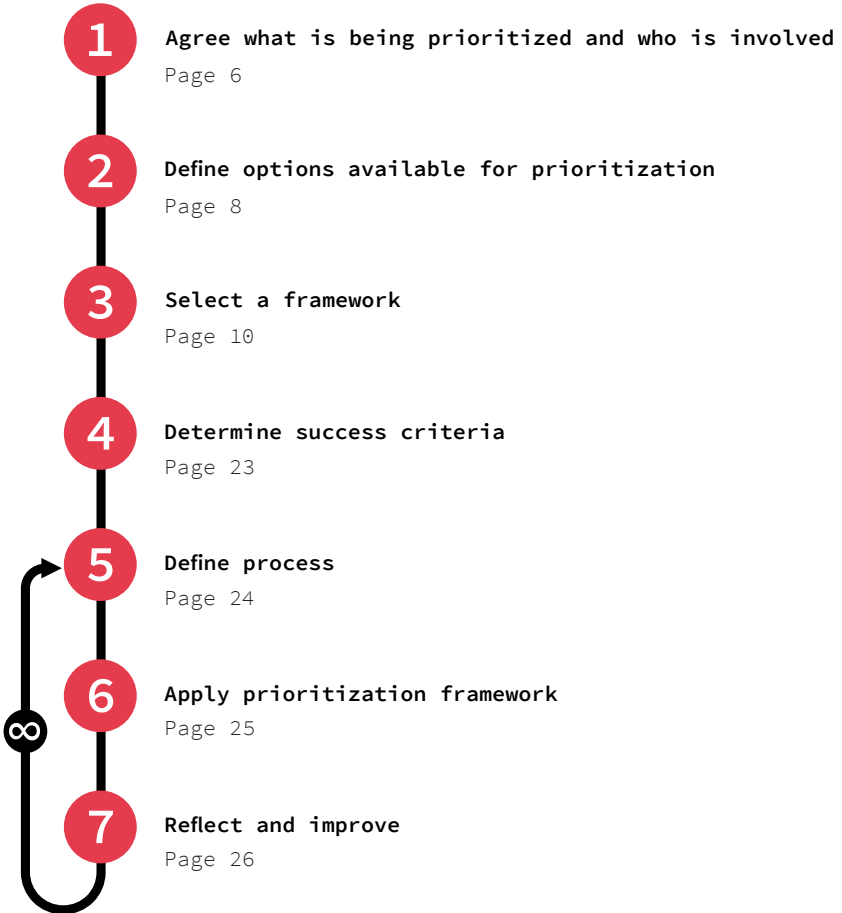
The Pareto Principle

20%
EFFORT

80%
RESULTS
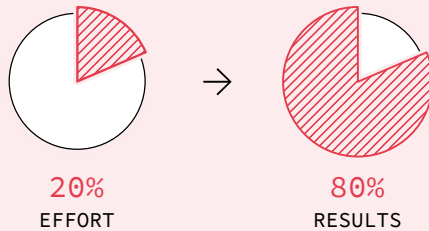
The Pareto Principle tells us that 20% of our efforts deliver
80% of the results. Mastering prioritization steers you and
your team towards the right 20% more often. The upshot is
worth the effort: more impact.

Knowing where you're going is half the battle. With this in mind, we've created a handy map you can follow.

1 Agree what is being prioritized and who is involved
Page 6

2 Define options available for prioritization
Page 8

3 Select a framework
Page 10

4 Determine success criteria
Page 23

5 Define process
Page 24

6 Apply prioritization framework
Page 25

7 Reflect and improve
Page 26

For the rest of this workbook, we'll walk through each of these steps together.

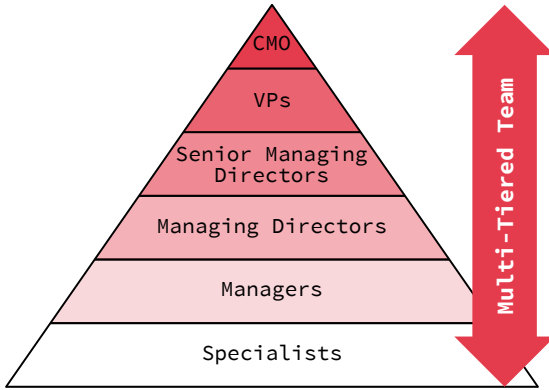# Step 1
What and Who?

Prioritization happens at different levels. Which one matches your needs right now?

☐ **Organizational:** Choices that guide the direction of the entire organization.

☐ **Departmental:** Deciding on the direction of one department.

☐ **Cross Team:** Choices affecting more than one team, but not the full department.

☐ **Single Team:** Choices guiding a single team within a larger department.

☐ **Individual:** Personal choices about daily activities and workload management.

> ❶ **NOTE:** If you picked **"Individual"**, skip to Step 2.

Otherwise, the question you need to answer is: who should be involved? The ideal group will offer a balanced mix of:

- **Decision-making authority:** These people have the power to make the call.

- **Expertise:** These people have knowledge and skills in key areas.

- **Front-line insights:** These are the people who will execute the things you're prioritizing.

The pyramid shows, from top to bottom: CMO, VPs, Senior Managing Directors, Managing Directors, Managers, Specialists. A vertical double arrow labeled "Multi-Tiered Team" appears beside the pyramid.
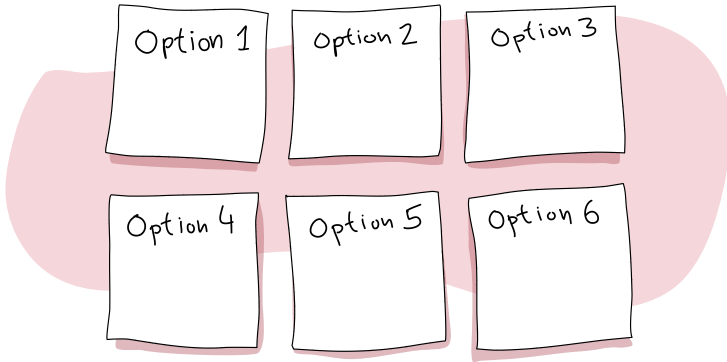

✏️ **DO IT NOW**

Pause now to draft an initial list of participants that matches the level you're working at. For example, if you're prioritizing team-level activities, you probably don't need to involve the CMO.

Step 2
Define the Options You're Choosing From

Before you can choose the most impactful actions, you need to list out all of the options in front of you.

To make sure you've got a complete list, start with all the options you've already considered. These might include strategies and tactics from previous years, activity backlogs you've already assembled or even that list of dream initiatives you keep tucked away in a special secret folder.

Once you've got all of that in front you, it's time for some fresh ideation. If you're working as a group, consider a survey or a carefully structured brainstorming session. If you're working on your individual priorities, consider putting your laptop aside and sketching out a map of the best possible future with old-fashioned pen and paper.

Draft your full list of options before going any further. Take as much time as you need. And don't worry if you miss one or two items. Progress is more important than perfection.

Step 3
Choose Your Framework

This step is absolutely crucial. It starts with two questions.

1. **First, what is being prioritized?** Are you choosing from specific tactics (doing more Instagram videos vs. launching on TikTok) or making strategic decisions on a larger scale (overall focus on acquiring new customers vs. pursuing more value from existing ones)? Where do you fit on this continuum below?

<div align="center">

WHAT IS BEING PRIORITIZED?

Strategic ⟵⟶ Tactical

</div>

2. **Next, how much rigour is required?** Some approaches are more exhaustive and quantitative. These are useful when the stakes are high, but they're likely overkill in most situations. It's also important here to take a clear-eyed look at the overall sophistication of your organization. If you pick a system that's too complex and out of step with the way work actually happens, you're off to a bad start.
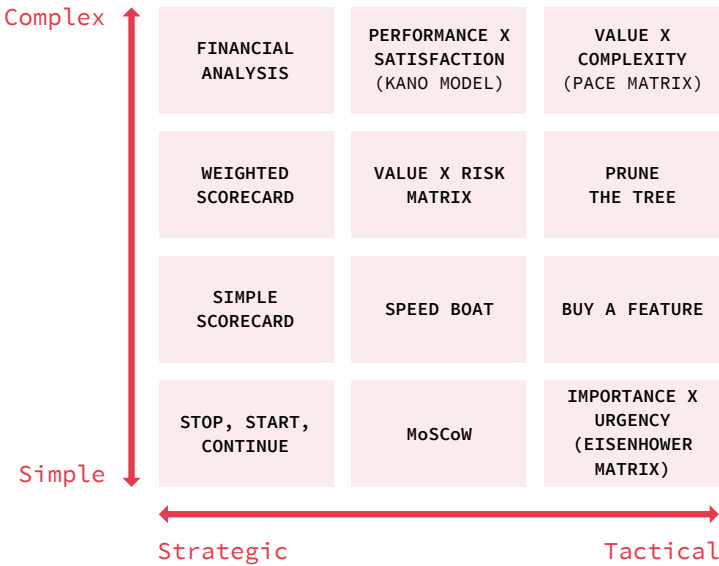
    With all of this in mind, where do you fit on this continuum?

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HOW MUCH RIGOUR IS REQUIRED?

Simple ⟵⟶ Complex

</div>

In the matrix below, these two continuums become axes, helping you explore the prioritization frameworks that best match your specific needs.

	Complex		
	FINANCIAL ANALYSIS	PERFORMANCE X SATISFACTION (KANO MODEL)	VALUE X COMPLEXITY (PACE MATRIX)
	WEIGHTED SCORECARD	VALUE X RISK MATRIX	PRUNE THE TREE
	SIMPLE SCORECARD	SPEED BOAT	BUY A FEATURE
	STOP, START, CONTINUE	MoSCoW	IMPORTANCE X URGENCY (EISENHOWER MATRIX)

Complex ↑ / **Simple** ↓

Strategic ←→ **Tactical**

Next we'll give **five** of these frameworks a closer look. We've chosen the ones used most commonly with our clients. If none of these are a good match for your position on the matrix, stop now for a little desk research into those that fit bitter.

Step 3: Framework 1
Stop, Start, Continue

OVERVIEW

Retrospectively review the performance of strategies to date while generating new alternatives.

WHEN TO USE IT

You're making strategic choices, but the decisions are relatively simple.

HOW TO USE IT

1. Articulate your objective clearly.

2. List out things you're currently doing to achieve the objective.

3. Add your list of new options to consider to form a single pool of possible actions.

4. Sort each item on the list into one of the three categories.

BENEFITS	DRAWBACKS
• This simple concept is not reliant on training.	• The definitions of each category needs to be defined clearly to ensure they're not misinterpreted by the team.
• Quick and easy to complete.	
• Effective for both existing strategies/tactics and potential ideas.	• Relies on everyone involved having a solid understanding of the potential impact.
	• Too many things can end up in the "must" category.

STOP

Current activities that shouldn't continue.

START

New activities to add to the mix.

CONTINUE

Current activities that are worth keeping up.

Step 3: Framework 2
MoSCoW

OVERVIEW

Categorize items into one of four groups based on how important they are.

WHEN TO USE IT

The choices you're making are a mix of strategic and tactical. You're looking for a framework that's fairly straightforward.

HOW TO USE IT

1. Agree on the objectives.

2. Agree on any further criteria.

3. Review the items on your list of options to consider.

4. Sort each item on the list into one of the three categories.

BENEFITS	DRAWBACKS
• This simple concept is not reliant on training.	• The definitions of each category needs to be defined clearly to ensure they're not misinterpreted by the team.
• Quick and easy to complete.	
• Effective for both existing strategies/tactics and potential ideas.	• Relies on everyone involved having a solid understanding of the potential impact.
	• Too many things can end up in the "must" category.

MUST	SHOULD
Unquestionably vital.	Desired but not essential.

COULD	WON'T
Nice to have, time and budget permitting.	Limited value.

Step 3: Framework 3
Simple Scorecard

OVERVIEW

Activities are assessed against a simple, unweighted scorecard. Only those that meet all of the criteria make the cut.

WHEN TO USE IT

The choices you're making are related to strategy and some degree of rigour is required.

HOW TO USE IT

1. Agree on the objectives.

2. Agree on your criteria, ideally 3-7 of them.

3. Rate each option or idea against all the criteria.

4. Ideas that don't meet all of the criteria are eliminated.

BENEFITS	DRAWBACKS
• Easy to apply.	• This binary system doesn't yield any sort of ranking.
• Most useful for filtering out activities to be dropped.	• Assumes that all criteria are as important as each other.

	CRITERIA 1	CRITERIA 2	CRITERIA 3	GO/ NO-GO
IDEA 1	✓	✓	✓	✓
IDEA 2	✗	✗	✓	✗
IDEA 3	✓	✓	✗	✗
IDEA 4	✗	✓	✓	✗
IDEA 5	✓	✓	✓	✓

Step 3: Framework 4
Weighted Scorecard

OVERVIEW

Adds a mechanism for weighted ranking to the simple scorecard.

WHEN TO USE IT

You're making strategic choices that require more rigour than the simple scorecard can provide.

HOW TO USE IT

1. Agree on the objectives.

2. Agree on your criteria, ideally 3-7 of them.

3. Agree on the weighting of each criteria.

4. Create a spreadsheet to handle the calculation.

5. Rate each option or idea against all the criteria.

6. Eliminate the lowest ranked options.

BENEFITS

- Allows the team to stipulate the most important success criteria.

- Provides a ranking of the activities as an output.

- Adds some quantitative rigour to the prioritization process without making it overly complex.

DRAWBACKS

- More complex.

- Time consuming to set-up, apply, and review.

	CRITERIA 1 Weight: 50%	CRITERIA 2 Weight: 30%	CRITERIA 3 Weight: 20%	TOTAL Max 5	RANK
IDEA 1	5	2	1	3.3	2
IDEA 2	3	3	3	3.0	=4
IDEA 3	4	2	3	3.2	3
IDEA 4	5	4	4	4.5	1
IDEA 5	1	5	5	3.0	=4

Step 3: Framework 5
The Eisenhower Matrix

Use this simple quadrant to consider both importance and urgency.

OVERVIEW

Use this simple quadrant to consider both importance and urgency. Named for its originator, former U.S. President Dwight D. Eisenhower.

WHEN TO USE IT

You're prioritizing tactical choices or tasks and there's no need for too much rigour or complexity.

HOW TO USE IT

1. Sort your options into one of the four categories.

2. Proceed accordingly.

BENEFITS

- A great tool for individual prioritization. Works effectively for managing workloads and activities.

- Improves productivity by focusing on urgency and importance.

- Helps leaders delegate.

DRAWBACKS

- Less effective for broader strategic prioritization.

- Requires the ability to delegate.

- The outcomes may change throughout the process as importance and urgency of an activity is relative to other activities on the list.

NOT URGENT, BUT IMPORTANT Decide when you'll do these and schedule it	**URGENT AND IMPORTANT** Do these tasks as soon as possible
NOT URGENT NOR IMPORTANT Drop these from your schedule as soon as possible	**URGENT, BUT NOT IMPORTANT** Delegate these tasks to someone else

Importance

Urgency
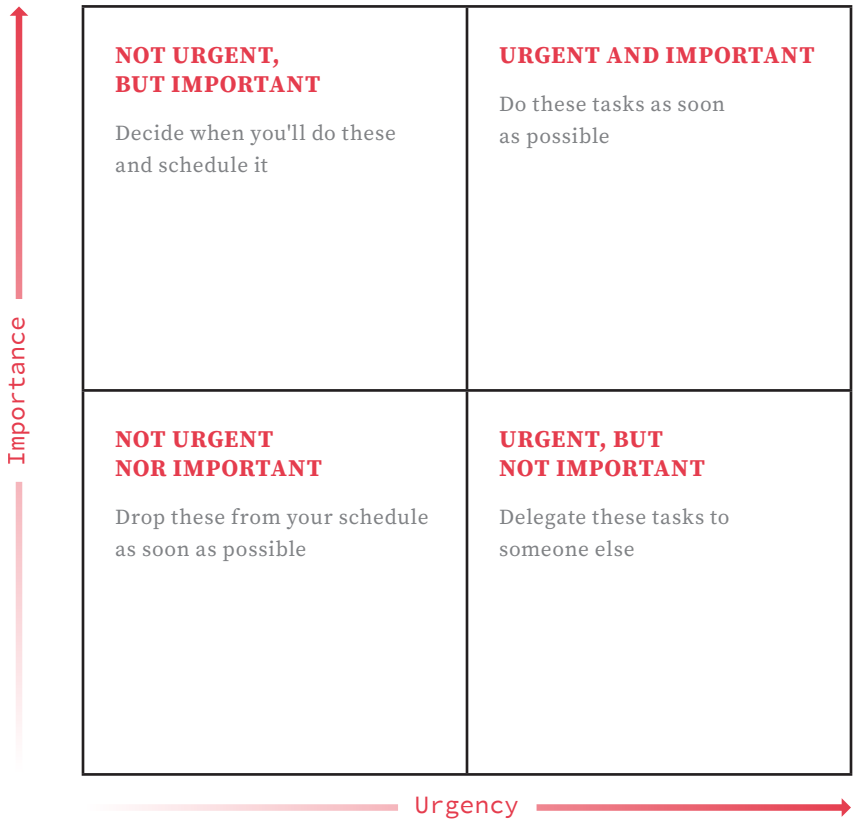
DO IT NOW

It's time to choose the best framework for your needs. Review your position on the matrix along with framework descriptions above and the results of any desk research. Then make a call based on what fits the best.

FINANCIAL ANALYSIS	PERFORMANCE X SATISFACTION (KANO MODEL)	VALUE X COMPLEXITY (PACE MATRIX)
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Complex ↑ — Simple ↓

Strategic ←————→ Tactical
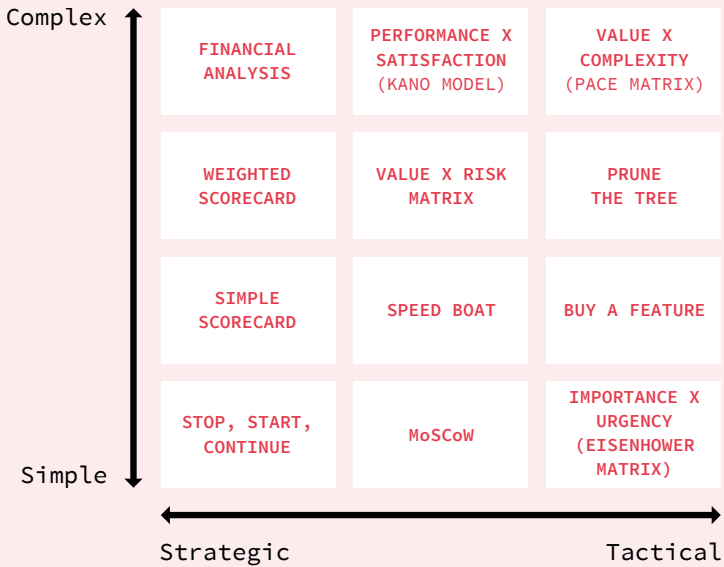
Step 4
Define Your Criteria

Whatever method you use, prioritization relies on a clear definition of what makes a specific activity valuable.

SOME TIPS TO BEAR IN MIND:

- Shoot for somewhere between four and seven so things don't get too complex or difficult to manage.

- Make sure you don't have any criteria that cancel each other out.

- The right criteria will be very specific to the context you're working in. There are no right or wrong criteria.

- If you're working as a group, define the criteria together.

- Make sure everyone has a clear, shared understanding of all of the criteria.

- Recognize that your criteria may end up changing once you put them into practice. This is normal and nothing to worry about. In fact, it's a good sign—it shows that the process is helping you see things clearer.

✏️ **DO IT NOW**

It's time to choose your criteria. Remember, somewhere between 4 and 7 is ideal.

Step 5
Define Your Process

Now it's time to plan your approach for putting your framework and criteria into practice. How will the process be set up? How will it be managed? What can be done now to turn prioritization into an ongoing practice instead of merely a one-off?

To ensure you've covered all the bases, break your decisions into three categories.

Before you start, there are a few things you should bear in mind.

First, if you're prioritizing as part of a larger quarterly or annual planning process, consider taking advantage of the break in everyday activities to add more participants and more rigour. If you're doing it while these plans are already in-flight, consider an approach that's smaller and more nimble.

And second, recognize that it's okay to start small. The process doesn't have to be complicated to be effective.

✏️ **DO IT NOW**

Don't go any further until you've drafted an action plan that covers these questions.

Step 6
Get Prioritizing!

Congratulations on making it this far. If you've followed all of the previous steps, you're well set up to succeed. But potential pitfalls still exist. Here are some tips for avoiding them:

- Someone needs to own the prioritization process. Without a clear owner, it will never happen.

- Resist the urge to make this one-and-done. Prioritization works best when you dedicate time to it and turn it into a habit, whether you're doing it alone or as a team.

- Adapt to new information that impacts priorities. Feedback is inevitable as you move from planning to action. Take the time to feed these signals back into your prioritization system to make it stronger.

- As new opportunities arise, run them through the framework to keep your workload manageable and avoid needless distractions.

- Make sure leadership are fully bought into the outcomes. This will help to manage future requests.

- Socialize the outputs from prioritization widely.

Step 7
Reflect and Look For Ways To Improve Next Time

Now that you're done, it's time to reflect on what you've learned so the process will go better next time.

Take a moment to reflect on these questions:

- Was the team satisfied with the outputs? If not, why?

- Was the framework understood and applied correctly?

- Does the prioritization criteria need to change?

- How about the process and tools? Are any tweaks or adjustments called for?

- Were too many / too few involved in the process?

✏ **DO IT NOW**

Why wait? Jot down some honest answers to these questions while you're thinking about them. Then head back to the beginning and start planning for next time.

Bonus Step
Pay it Forward

If this workbook was helpful, share it with a friend or colleague.

About Modern Craft

Modern Craft is a consultancy dedicated to helping organizations supercharge marketing operations. Our clients are our partners and serving them is our priority.

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