

A blurred background image of a laptop screen. The screen shows a line graph with data points and a pie chart with a green slice labeled '27.8%'. The text 'Learn to Rally Your Team' is overlaid in white. 'Learn to' is in a sans-serif font, while 'Rally Your Team' is in a large, white, handwritten-style script font. A thin white horizontal line is positioned below the word 'Rally'.

# Learn to *Rally Your Team*

Building strong marketing teams is essential—but often elusive.

R A L L Y

# Chapters

## Chapter 1

**Page 5** Client In-House Marketing Teams

## Chapter 2

**Page 23** Agency Marketing Teams

# Introduction

Both in-house marketing departments and outside agency teams need to build strong marketing teams to succeed—but team building can get tricky. Teams are groups of humans, and humans can be complicated.

Getting everyone on the same page and working toward the same goals takes work. We happen to be experts at that work. Keep reading to get guidance and tips based on proven tactics that have repeatedly helped us build strong marketing teams.





# Chapter 1

## Client In-House Marketing Teams

Rally Your Team focuses on clarity, unity, innovation, and winning to help our clients build and strengthen their in-house marketing teams.

Here, we share some steps that any in-house marketing team can take to build stronger teams.





# ◆ Clarity

## 1. Start with a clear definition of what success looks like.

Ask everyone on your team what they think success looks like for your team—don't assume everyone is on the same page. Once you've collected answers, you can work to implement one agreed-upon definition of success so you can work toward it as a team.

Everyone you supervise or hire should be crystal clear about what keeps you up at night.

## 2. Get everyone to understand their role and contribution.

Beyond understanding your company's definition of success, each team member needs to understand how their role contributes to success. Have frequent discussions with them that show consistent focus and progress toward making that success a reality.

All team members should know exactly what they need to do and where they stand in relation to their goal.

## 3. Make sure everyone understands your value proposition.

It's fundamentally critical for everyone on your team to know and understand your community or your system value proposition to customers—and to be as passionate about it as you are. That doesn't mean everyone needs to say things exactly like you, but they should fully understand the value and be able to communicate it.

Not sure what your value proposition to consumers is? You're not alone. [Get help](#) and hire someone smart to help you rally and figure it out.

## 4. Create consistent decision-making processes.

Everyone on your team should base their decisions on a combination of your definition of success and the organization's value proposition to customers. Any deviation is a potential distraction.

Do you find it difficult to keep your team focused on what's important? [We have more tactics](#) that can help.

## 5. Set goals and get projected ROI.

When projects or initiatives are proposed, start by setting goals and make sure you understand the projected ROI or an intangible but important result. Be sure everyone knows the goal(s) right away, so they have a fighting chance of meeting expectations.

Before moving on to each next step, make sure the team is in agreement about what to do next.







# ◆ Unity

## 1. Create an environment that fosters success.

In other words, create a team where everyone is rooting for each other to win. How? Constantly make sure that your team members have the tools and resources they need to be successful.

Asking team members if they have what they need to succeed will make them feel comfortable talking about it, eliminating excuses for not meeting expectations.

## 2. Don't be afraid to challenge each other.

It's great to get along, but beware of groupthink. Unity means you're all working toward the same goal—it doesn't mean you always agree.

Working through healthy disagreements and debate is good. Team members need to feel safe having differing opinions, or you'll never have true unity.

### 3. Be aware of how you spend your time.

What you focus your time and energy on is what people believe matters most to you, regardless of what you say. “Actions speak louder than words” may be a cliché, but it’s true.

Make sure you give equal time to important topics during meetings and conversations, and beware of talking too much about the things that personally interest you more.

### 4. Don’t be afraid to pivot.

You’re not moving a couch, you’re building a team—you can pivot. When you find out people on your team have skills or knowledge outside of their usual roles, don’t be afraid to use them in order to help the team reach success.

You may hire people or agencies for one reason but find out they have another useful talent or potential role—that’s what people mean when they say it’s a win/win.

## 5. Hire people who are good with people.

Sounds like simple advice, but in marketing and sales, people skills are a deal-breaker. Marketing and sales are all about people. To succeed, one needs an understanding of how to work with and understand others.

Interpersonal skills speed work along. Having to mediate team interactions delays progress.

## 6. Don't play favorites.

It's normal to favor personalities of certain team members. You're human, and you may be inclined to spend more time with some team members than others. However, you have a vested interest in building a well-rounded team, and you need to treat everyone equally.

Find ways to include those you don't naturally gravitate toward. Show that you believe they are important to the team. You may believe it, but they need to feel it.









# ◆ Innovation

## 1. Give everyone permission to get creative.

Use both words and behavior to make clear that you want to see everyone's creative side. Show that you want them to make you uncomfortable and pull you out of your comfort zone. They need to feel encouraged to present new ideas.

Associates who feel like there may be negative consequences to sharing untraditional or risky ideas will stop sharing their ideas—and it's hard to un-ring that bell. Always give positive reinforcement for creative, new ideas, even if a particular idea won't work.

## 2. Try new things.

Your team will learn from watching you, so if you want them to take chances with new, innovative ideas, you need to put yourself out there, too. If you want others to believe you're open to trying new things, lead the way.

A great way to get a team to suggest new ideas is by leading the discussion with an idea of your own.

### 3. Accentuate the positive by embracing the negative.

It sounds a little weird, but the tough times are necessary and good. The most innovative ideas are the result of adversity. When a team is forced to deal with a negative, they can dig deep and turn it into a positive.

Finding new solutions to problems ultimately makes us all better and builds stronger teams.

### 4. Get better at being dreamy.

You read that right. We're encouraging you to daydream and embrace your "silly" ideas. Why? Because the most genius solutions come out of group ideation sessions. What you might think sounds dumb can inspire another team member to find the perfect solution. Some of the best ideas come from silly suggestions. Before there was Uber, someone said, "I wish there was a way to call a taxi without having to call a taxi." Everyone on your team should feel free to express themselves.

It starts with you. If you are willing to think differently and put yourself out there, everyone else feels more comfortable doing the same.

## 5. Don't stop believing.

We're not joking—you really do need to hold onto that feeling. We strongly believe that believing in yourself and your ideas helps manifest success. It's that simple.

Nearly every problem can be solved with time and ingenuity.



## 6. Innovation comes in all shapes and sizes.

There is no innovation too small. Even small process changes can have a huge, positive, lasting effect on the whole team. Innovation doesn't require a major shift—one minor change can have a major impact.

Little things are important and can make a huge impact.

## 7. Go big or go home.

You might hear that a lot on competition TV shows, but it applies to the world of marketing and sales, especially in the senior living industry. While it's important to know what works for your industry and to use best practices, it's just as important to challenge what works—and that includes industry best practices. Don't be afraid to go big and think about the craziest way to solve the problem. That's how progress happens.

If you think “no one would ever do this, but it might work,” seriously consider the pros and cons of giving it a try. If the pros are big enough, it might be worth a try.









# ◆ *Winning*

## 1. Enjoy being awesome.

Happy teams are the best teams. Enjoy your day and love what you do—and make sure your team is enjoying their days and loving what they do.

People who are happy and love what they do strive to be the best.

## 2. Lead by example and take care of yourself.

Seriously. No matter what you tell yourself, if you're not taking care of yourself, your team won't take care of itself. Winning at work and losing personally isn't winning. People want to impress you because they want promotions and compliments. If you work crazy hours, never take days off, get overly stressed about presentations, or struggle to bounce back from failures, that's going to rub off on your team.

Your team is watching you and many will imitate your behaviors, because they think that's what you expect them to be doing.

### 3. Be comfortable with accountability.

This means that you can't make the idea of accountability uncomfortable—not for yourself or anyone else. Have candid, no-big-deal conversations about accountability early and often.

Set the stage for a healthy relationship early. Need a little more advice about how to do that?  
[Just ask Candice.](#)

### 4. Embrace being challenged.

Expect your people to both listen and challenge your thinking. Big wins are hard-fought, and they aren't easy—it's a team effort.

No one expects you to have all the answers, but they do expect you to lead a great team.



## 5. Celebrate good times.

When you win, bring out your good times and your laughter, because you need to celebrate. We're not talking about a good-job email or pizza Fridays. Make it meaningful. Give a speech. Buy an ice cream cake. Take a long team lunch. Do something that everyone will enjoy.

Teams that celebrate wins and cheer each other on attract more like-minded people who also love to win.



# Chapter 2

## Agency Marketing Teams

Rally Your Team focuses on clarity, unity, innovation, and winning to help agencies and other marketing consultants build and strengthen their relationships with their teams and their clients so everyone gets the best possible results.

Here are some steps any marketing agency or consultant can take to up their game.







# ◆ Clarity

## 1. Understand what matters most to the client.

It's crucial for marketing consultants to be crystal clear on what matters most to their clients. You can't solve a client's problems unless you know what's keeping them up at night.

Once you identify what keeps the client up at night, your team can focus their efforts on what's most important. Need help getting there? [Ask Candice](#).

## 2. Be clear on expectations and goals.

When we say clear, we mean absolutely no obstacles in the way of understanding what needs to happen. If your client has an expectation you don't believe you can meet, tell them and try to reset expectations.

Do what is best for the client. Taking their money and hoping they'll be happy with what they get rarely works out. Don't leave it up to fate—get more clarity.

### 3. Create a space for honesty.

It's crucial that your client feels they can be completely honest with you—but don't assume that they are. Many clients are uncomfortable sharing thoughts and opinions with people who have expertise they don't. Clients are very much human, and they're just as afraid of looking stupid or getting hurt as the rest of us.

It's important to have at least one person on your team who connects with your client on a deeper level, so you are always clear where you stand.

### 4. Listen and share.

To build a relationship, there has to be give and take, and you have to show that you're trying. Show the client you're listening to what matters most to them by always sharing how your recommendations can match or support their goals.

Be your client's secret weapon. Help them elevate their game by truly listening so you can inspire bigger, better ideas about how they can reach their goals.



# ◆ *Unity*

## 1. Use the figuring out period to make progress.

After a new engagement, clients expect a period where you're figuring out how they work and approach things. Take advantage of this period by suggesting process improvements and highlighting areas where things could be better. It's a give and take early on.

Assume your client is receptive to improvement suggestions until they aren't.

## 2. Ask for what you need; prepare for trade-offs.

It's crucial that team members and agency partners feel like they have the tools and resources they need to succeed. Ask for the budget you need, but be prepared to share trade-off options for lesser budget amounts. Think ahead of time about what are musts and what are nice-to-haves.

Don't be offended by your client's budget constraints. Help them make the case for more budget if they are open to asking for it. [We can give you some tips on how to do that.](#)

## 3. Be a good sport.

Sometimes—and we really mean sometimes—agencies and consultants perform work for their clients at a loss. Everyone has done it. You care about your clients, and if there is something that is important to them and you believe it's good for their business, take the loss if you can, but be graceful. They don't need to be reminded.

Clients will remember when you go above and beyond. The reward will come with a contract renewal.

## 4. Play nice with other contractors.

It's important to always get along with the other firms your client works with, even if they're competitors. Be professional and treat them, as best you can, like they're your coworkers. Remember that there is a reason your client hired them (even if it's not immediately apparent to you).

If you believe your firm could do better, then outshine them. You can't ask for other company's business when you haven't proven yourself yet.

## 5. Recognize a mismatch when it happens.

You and your clients don't have to be best buds. But you do have to be human to each other. And clients aren't perfect—they can be so entrenched in dysfunction that they're not ready to be enlightened, and it's demoralizing. If it's not a good match, it's not a good match.

If you hate working for a client for any reason, the best thing you can do for your agency and the client is find someone better suited for the client. (If you work for an agency that doesn't respect their teams enough to think like that, we're sorry.)



## 6. Work with people who like people.

“People skills” sounds vague, but they’re crucial in the sales and marketing world. It’s important to hire a team of emotionally intelligent people and to engage with clients who have emotional intelligence.

Always work with clients who have as much passion for their business as you do for yours.



# ◆ Innovation

## 1. Go to industry bootcamp.

Your client eats, breathes, and sleeps their business. If they've worked in the same industry for years, it's going to be difficult to convince them to take you seriously when speaking about their industry. Consider paying someone who knows the area to put your team through an educational bootcamp or be an ongoing consultant to advise the team.

An industry educational bootcamp will save you from presenting something as innovative that's actually not or suggesting ideas that aren't based on sound thinking. [Rally can help](#) you with this tactic.

## 2. Be true to yourself and what you believe.

Resist destructive client training. If they keep shooting down your innovative and creative ideas because they're afraid of change, don't let that train you to put status quo ideas on cruise control. You must stay true to why you are in the business, regardless of how you're being treated by the client.

The truth? A client who rejects innovation will also leave you for an agency they feel is more creative if you stop presenting your awesome ideas. Is this fair? No. But it should remind you to resist the urge to do work just to secure approvals—do your best work because that's who you are.

## 3. Get pumped up about difficult things.

The client calls you and gives an assignment that's going to challenge every last one of your skills. It's going to be hard and not a lot of fun. What should you do? You get excited—very excited. Confidently excited. Your client is already nervous about this big challenge, so you need to reassure them that you've got it under control.

Clients need to hear that you are up for their challenges. They need to hear your enthusiasm—challenges are good. They're a great way to truly show your value.

#### 4. Remember: You're in a relationship.

Sure, they may not be your Valentine, but you are definitely in a relationship with your client. Move carefully, build up, plant seeds—get a feel for when they are ready for your ideas and wow them. Show them you're thinking of them. A client is never going to be mad about ideas that help them solve problems.

Your client wants to see fun stuff. They want to work with companies that show them creative work. You are likely the best part of your client's day, so get excited and stay there.





# ◆ Winning

## 1. Make them believe that you believe.

Your client needs to win. You get paid whether they win or lose, but if they lose, they have consequences. They need to trust you and believe that you want to win as much as they do.

The thing is, you do want them to win as much as they do. Not sure you're expressing this clearly?

[Ask Candice.](#)



## 2. Be accountable when you miss the mark.

If the client is coming to you and saying, “You missed the mark,” you missed more than just the mark. You missed that you missed the mark—which is worse than missing the mark. Be self-aware and accountable. Tell your client when tactics are under-performing or just not working at all, and tell them what you’re going to do to fix it.

Honesty like this shows that you know how to monitor yourself—your client will sleep better.

## 3. Pat your client on the back.

When your client is doing something great? Celebrate it. Tell them they’re doing a great job, even if it seems like something small—it may mean a big deal to your client. Don’t make it up; mean it.

Clients may not have a positive reinforcement culture at their office. You can be the person that reinforces their good work. That connection is invaluable.

## 4. Listen. (That's it. Just listen.)

There may be times when your client just needs an ear. They have things to say and aren't looking for answers, just a sounding board. Resist the urge to always step in with fast answers. Build a relationship where you can just listen and the client feels listened to.

It's okay to tell clients that you don't know, you need to think about it and get back to them.



**Celebrate wins.**

**Cheer each other on.**

**Attract more people who love to win.**

# RALLY

Connect with Candice. She and the rest of the Rally team can't wait to see what problems they can solve for your senior living marketing team.

Connect with Candice

**Call:**

816-729-2903

**Email:**

[candice@rallyyourteam.com](mailto:candice@rallyyourteam.com)

