

THE CUSTOMER MARKETING & ADVOCACY CAREER FRAMEWORK

THE ULTIMATE GUIDE TO PROMOTION

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INTRODUCTION.

Hello to the most passionate marketers this world will ever know. As your CMA Soulmate, I'm here to make sure you get the recognition and promotion you deserve. You can say goodbye to awkward performance reviews that seem more like a dark art than a science. This career path framework sets clear expectations, making conversations around performance and promotions more objective — and brings confidence to the process.

This framework will also help you if you are leading a department. As a manager, you are responsible for creating a clear development plan for each person in your department. This document will serve as a template to establish a path to your individual contributor's next title change that maps out current and future responsibilities. This improves conversations about performance and progress, which should take place regularly, not just during the annual review cycle. And remember, have fun!



ABOUT YOUR CMA SOULMATE

Voted one of the Top 25 Customer Marketing & Advocacy Influencers, Leslie Barrett is a customer-centric marketing leader with extensive experience in building, executing, and scaling CMA programs. With over ten years of experience in the Martech space, she is passionate about the power of customer advocacy to create memorable experiences that deepen relationships, enhance customer satisfaction and, as a result, drive revenue. She loves helping the fellow CMA community learn the marketing strategies they need to showcase their excellence and get the promotion they deserve.



PURPOSE

This career path framework is intended for both the Head of Customer Marketing and the individual contributor to assist in professional development and recognize commitment and excellence. The framework helps you define the competencies needed to progress through a job level by demonstrating increased responsibilities and enhanced knowledge, skills, and abilities.

The manager and employee meet to discuss the employee's career path. This is not a performance review but rather a conversation about level and personal development. The Career Path Framework then serves as a template used in performance reviews to ensure feedback is focused, consistent and objective. It also serves as a foundation for decisions around promotion, compensation, etc.

FRAMEWORK AND USE

The CMA Career Path Framework outlines the most critical pillars for success in each role, with clearly outlined customer marketing performance standards expected for each level.

- The Path Framework is composed of **8 pillars**. You can select all the pillars or **just the areas applicable to your role or company values**.
- Each pillar contains expected milestones/behaviors for performance across pillars at each level.
- People can perform at slightly different levels across pillars. (*e.g., '2' on Execution & Project Management, but a '3' on Initiative & Impact*)
- **How one scores across all pillars is what determines their level**
- For each pillar, the level that most closely represents someone's current level of performance is the level that should be selected.
- If someone is partially performing at the level above on a given pillar, the level below should be selected.



FRAMEWORK

The 8 pillars in the CMA Career Framework fall into three main categories: **Expertise, Delivery, and Organizational Growth**:



LEVELING

The process of considering or achieving a promotion is called leveling, and when we discuss this concept, we are evaluating 2 things:

- We are leveling the job itself
- We are identifying this person’s level of development within that level (e.g., low/mid/high)

Low/mid/high refers to how close to the next level the person is. If someone ranks ‘low’ that may mean they are newer to the role or were recently promoted. If someone ranks ‘high’, they are likely approaching readiness for promotion. Levels are typically assigned to a role when it is opened. Within the structure of an organization, seven levels exist between the earliest level of the contributor and the highest level of management. These can be outlined as the following:

| LEVEL | IC* TRACK | MGR TRACK |
|------------------|-----------|-----------|
| ENTRY/INTERN (1) | IC 1 | |
| ASSOCIATE (2) | IC 2 | |
| MANAGER (3) | IC 3 | |
| SR. MANAGER (4) | IC 4 | MGR 1 |
| DIRECTOR (5) | IC 5 | MGR 2 |
| SR. DIRECTOR (6) | | MGR 3 |
| HEAD OF/VP (7) | | MGR 4 |

EMPLOYING THE FORMAT

Ideally, the CMA Career Path Framework will become a trusted template for future performance reviews, but when rolling out the framework for the first time, we suggest:

- Walking your team members through the path structure and how leveling works
- Making a copy of the editable template to share feedback and discuss in person

The goals of those conversations are:

- For the employee and the manager to walk out of the conversation with a **mutual understanding** of where the employee is leveled/performing today
- To identify clear **areas of focus** for the employee to work on to progress in their career

The outcome of these conversations can help inform **personal OKRs, personal development plans & goals to discuss in future 1:1s.**

PILLARS

A successful career development strategy first requires a foundation that focuses on various alignments between employer and employee.

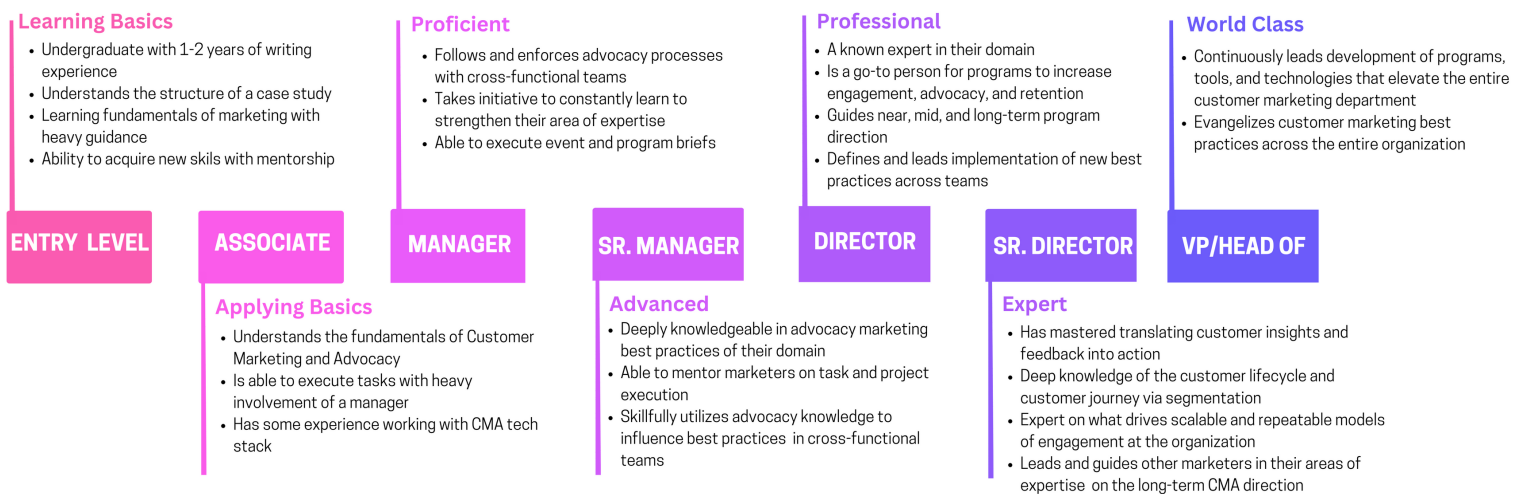
Inside the categories, you will find 8 pillars. Each pillar contains expected milestones/behaviors for performance across pillars at each level. These pillars will serve as a base that supports an effective and efficient career development path. Let's dig in!

EXPERTISE (WHAT YOU KNOW)

DEPTH OF KNOWLEDGE

Successful Customer Marketing relies on properly segmenting your audience, effectively engaging with customers, and elevating customers' experiences to improve retention and growth. This path requires you to be constantly learning to strengthen your Customer Marketing skills. In every field, the knowledge base constantly changes, so supplemental learning will be a critical part of your entire career. While evaluating, think of things like:

- How well does this person understand the tools and fundamentals of B2B SaaS and Customer Marketing?
- To what extent does this person have the skills, knowledge, and experience in CMA?
- Does this person perform exceedingly well in situations that are familiar to them?
- Are they viewed as a trusted resource within their organization?



Be sure to refer to the [Depth of Knowledge template](#) for more responsibilities listed.

COMPREHENSION

In today’s ever-changing environment, developing wide comprehension arms you with greater perspective and insight to stay agile and innovative. In Customer Marketing, you can gain breadth while in your role in the form of a stretch assignment or an opportunity to contribute to a cross-functional effort. While evaluating, think of things like:

- How well does this person understand customer marketing strategies and tactics?
- How well does this person understand and innovate in their job by using your own platform? (if applicable)
- How well does this person add value to non-marketing parts of the organization?
- How well does this person leverage quantitative data and qualitative customer input to infuse decision-making with deeper insights?



Be sure to refer to the [Comprehension template](#) for more responsibilities listed.

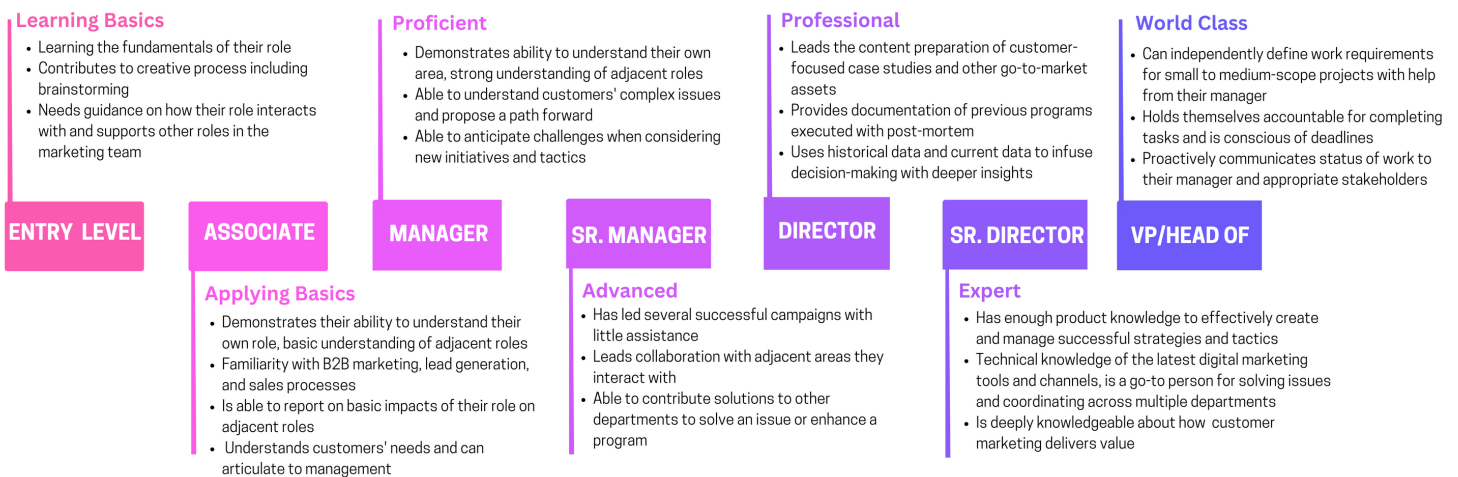
DELIVERY (WHAT YOU DO & HOW YOU DO IT)

COMMUNICATION & COLLABORATION

Collaboration adds to the goal of moving a program or product forward, but collaboration cannot happen without communication.

Communication allows relationships to function, and those relationships allow collaboration to both occur and be productive. This pillar is about how well someone communicates and collaborates in all directions. Consider the following attributes and characteristics:

- Is this person timely, constructive, and transparent in their framing and message?
- Is their message reaching the appropriate audience in the appropriate way and at the appropriate time?
- Do they drive the conversation forward during projects and keep things on track?
- Do they take ownership of mistakes and take feedback to heart?



Be sure to refer to the [Communication & Collaboration template](#) for more responsibilities listed.

EXECUTION & PROJECT MANAGEMENT

Campaign scheduling and planning are simply the beginning. Most of the work is done during execution. Due to the lack of resources in Customer Marketing, getting the execution right is critically important. To date, we (CMA) haven't been able to define the competencies needed to progress through a job level. The beauty of this pillar is that we can create our own. I have added some industry benchmarks to help. Consider the following attributes and characteristics:

- What is the velocity of projects this person is able to successfully drive forward?
- What programs do they need to execute to move forward within a level?
- How does this person contribute to the encompassing message to prospects & customers?
- How does this person contribute to broader company initiatives?



Be sure to refer to the [Execution & Project Management template](#) for more responsibilities listed.

INITIATIVE & IMPACT

At any given time, your organization’s marketing team may be focused on a handful of initiatives like rebrands, limited-time offers, or new product launches. It’s important to take the initiative to partner with adjacent teams to deliver a more impactful message to customers. Consider the following attributes and characteristics:

- Initiative: How active is this person in anticipating, creating, and improving customer campaigns?
- Impact: How complex is this person’s area of ownership?
- Do they actively spend their time/prioritize initiatives that move the needle?
- Are they able to recognize when it is time to drop projects/shift strategy when the intended result is no longer being achieved?
- Discovers new innovative ways to measure Customer Marketing initiatives.



Be sure to refer to the [Initiative & Impact template](#) for more responsibilities listed.

BUSINESS INSIGHTS - (MANAGER LEVEL)

The Business Insights pillar will outline a clear development path for management, just as it does for individual contributors (ICs). It's a great tool for communicating that management isn't about a position—it's about responsibility.

If you're considering management for prestige, title, or pressure from people you don't even know—just stay where you are and focus on increasing wages, stock options, etc.

If you want to take on responsibility for the people who have been placed under your care, for developing them, for helping them live into their full potential, for taking none of the credit for success, but all of the blame when things go wrong, then you might just make a great manager.

This pillar requires a team member to be able to process data from various sources, understand the key objectives, and leverage data to make timely and accurate decisions to provide the highest value to your business.



Be sure to refer to the [Business Insights for Managers template](#) for more responsibilities listed.

ORGANIZATIONAL GROWTH

TEAM & COMPANY VALUES

Some organizations struggle to create a memorable and magnetic workplace culture. Shared values, behaviors, and stories guide people within an organization. Customer-driven companies build a customer-focused culture, one where Customer Marketing sits at the core.

One thing is clear: a strong culture with values is a powerful talent attractor.

In this section, think of things like:

- Overall demeanor at work
- Does this person put the customer at the center of all CMA programs?
- Do they exemplify team and company values?
- Do they help other team members and contribute to the team overall?



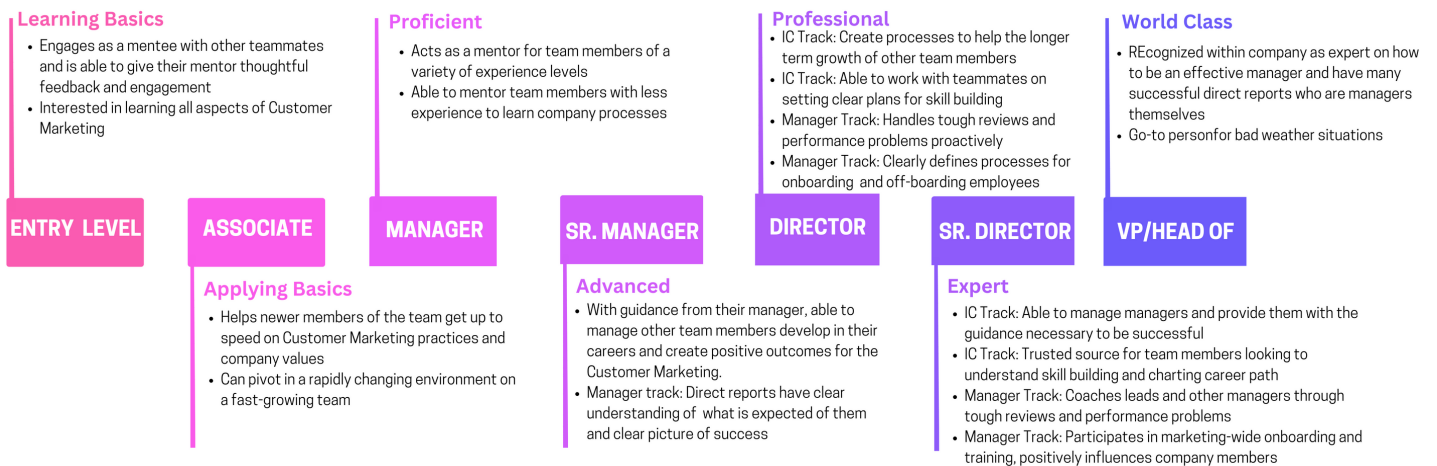
Be sure to refer to the [Team & Company Values template](#) for more responsibilities listed.

MENTORSHIP & CAREER DEVELOPMENT

There's a growing need to engage all workers and share the wisdom that only comes from experience, which is where mentoring fits in. This is typically offered by enterprise companies who want to help their employees gain insight and understanding into advancement opportunities within the organization. If this does not formally exist at your organization, then it's on your manager to help grow in your career.

ICs can help by creating processes and documenting program processes & success. In this section, consider:

- Does this person work to improve the skills of others on their team?
- Is this person proactive in knowledge sharing with team members?
- Manager track - Provides substantial feedback and transparency during reviews or in times of conflict.



Be sure to refer to the [Mentorship and Career Development template](#) for more responsibilities listed.

FINAL THOUGHTS

You're not finished yet! Hopefully you are already identifying the level you're performing at and most importantly the level you want to be operating at.

The second part of this asset will give you the confidence to create a clear development plan. Using the editable templates, work with your manager or IC to establish what needs to happen to get the next level. If a pillar doesn't make sense for your organization - delete it. That's the beauty of this editable template!

Also, if you are looking to seal the deal for a promotion, my course *Measuring the ROI of Customer Marketing & Advocacy* is available now.

ABOUT INFLUITIVE

Influitive believes all customers, partners, and employees can become brand advocates, but it requires building and maintaining trusting relationships. This is best achieved using targeted recognition, rewards, and personalized content at every stage of the journey.

Influitive's engagement software is the only purpose-built solution for this critical mission and the advocacy, community, and loyalty programs that make it possible. That's why the world's most customer-obsessed brands—including Adobe, Cisco, HPE, and IBM—trust and rely upon Influitive.

To learn more, visit [Influitive.com](https://influitive.com)

