CLIENT ONBOARDING GUIDE

THE MARKETING ENGINE ROOM™

From business direction to coordinated execution and measurable accountability.

A practical guide to how Michigan CMO enters your business, establishes marketing direction, leads the resources already in place, and builds the operating discipline required for growth.

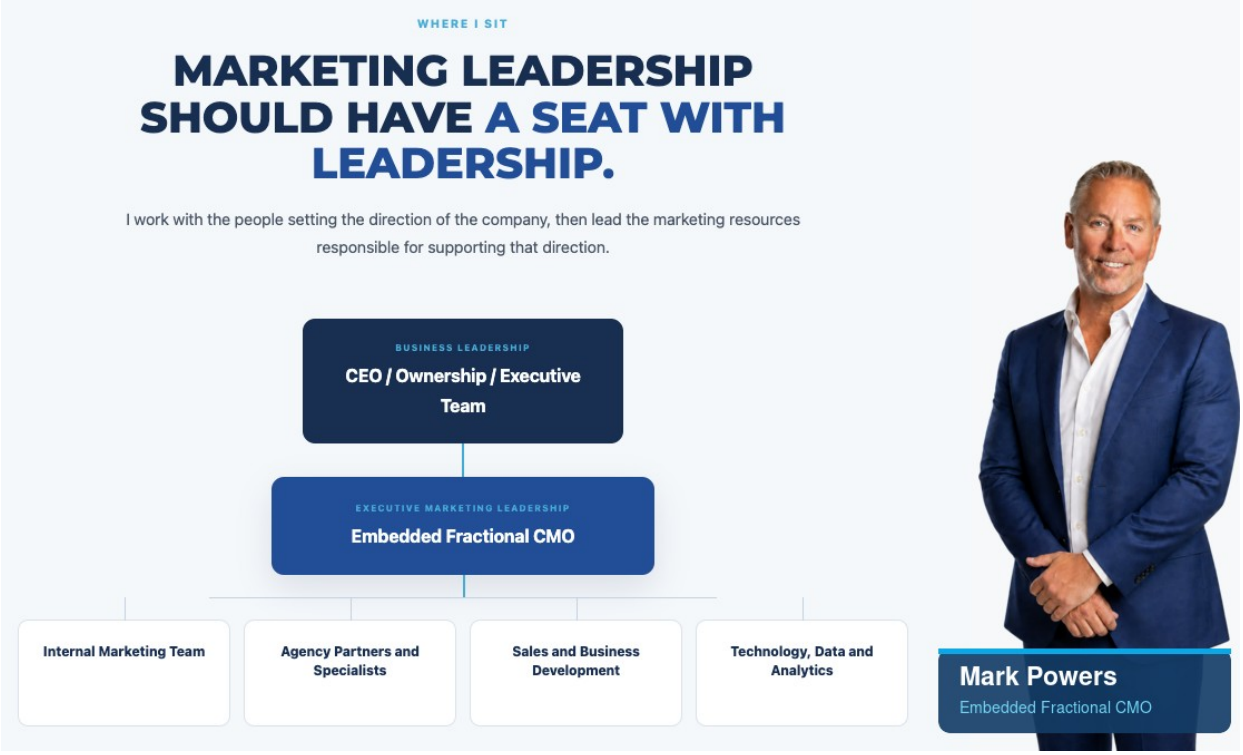
PREPARED BY	**Mark Powers**
ROLE	**Embedded Fractional CMO**
ORGANIZATION	Michigan CMO
PURPOSE	Client onboarding and operating alignment

Human leadership. Governed intelligence. Measurable accountability.

THE OPERATING MODEL

Where your Embedded Fractional CMO sits

Marketing leadership belongs inside the leadership structure, close enough to understand the business and empowered enough to lead the resources responsible for execution.



What this means for your organization

You keep the people, partners, and capabilities that make sense. Michigan CMO provides the executive marketing leadership that connects their work to the direction of the business.

The role is not another layer of marketing activity. It is the leadership layer responsible for direction, alignment, decisions, performance, and accountability.

> **LEADERSHIP COMMITMENT** The engagement works best when the Embedded Fractional CMO has direct access to leadership, clear authority over marketing priorities, and consistent participation in business decisions affecting growth.

THE ONBOARDING SEQUENCE

Five connected phases

The sequence creates shared understanding before major execution decisions are made. Timing is confirmed during kickoff based on business complexity, available information, and leadership availability.

PHASE	FOCUS	PRIMARY QUESTION	CORE OUTPUT
01	**Clarity**	What is actually limiting growth?	Shared fact base and priority issues
02	**Direction**	What must marketing accomplish?	Marketing direction and priorities
03	**Alignment**	Who owns what, and how will the work connect?	Operating model, roles, and cadence
04	**Execution**	How will priorities become coordinated action?	Activated work plan and leadership
05	**Accountability**	How will progress and contribution be measured?	Executive reporting and decisions

Before kickoff

1. Confirm the executive sponsor, decision makers, and primary client contact.
2. Provide access to current plans, performance reports, customer information, sales information, technology, and agency relationships.
3. Identify active initiatives, immediate commitments, major deadlines, and known concerns.
4. Schedule leadership discovery, marketing team interviews, agency conversations, and the initial operating meetings.

> **WORKING PRINCIPLE** Existing activity is not interrupted simply to create the appearance of change. Current work is assessed, protected where appropriate, and redirected only when the evidence supports a better decision.

PHASE 01

CLARITY

Establish the fact base before changing the work.

OBJECTIVE Create a shared understanding of the business, customer, market, sales environment, current marketing performance, available capabilities, and the conditions affecting growth.

What happens

1. Review business goals, financial expectations, customer segments, offers, positioning, and competitive conditions.
2. Assess current marketing activity, internal capabilities, agency performance, technology, data, analytics, and reporting.
3. Interview leadership, sales, marketing, and other stakeholders who influence the customer and growth.
4. Identify immediate risks, avoidable waste, missing information, and the issues requiring executive attention.

What we need from you

1. Open access to the people, systems, reports, plans, and agency relationships needed for an honest assessment.
2. Leadership participation in discovery conversations and confirmation of business priorities.
3. Clear disclosure of concerns, previous decisions, contractual commitments, and current expectations.

What you receive

1. Current state assessment and shared fact base.
2. Initial findings, risks, and opportunities.
3. Prioritized leadership questions requiring resolution.
4. Recommendation on what should continue, change, stop, or be investigated further.

DECISION GATE Leadership confirms the primary growth constraint, the most important unanswered questions, and the issues that must guide marketing direction.

PHASE 02

DIRECTION

Translate business priorities into marketing priorities.

OBJECTIVE Define what marketing must accomplish, where leadership wants the business to go, which customers and opportunities matter most, and what success should look like.

What happens

1. Convert business goals into clear marketing objectives and commercial priorities.
2. Clarify target customers, value propositions, market position, customer experience, and go to market choices.
3. Establish the decisions marketing will support across growth, sales, brand, demand, customer retention, and market development.
4. Sequence priorities so the organization knows what matters now, what comes next, and what is intentionally deferred.

What we need from you

1. Leadership agreement on business priorities, financial expectations, risk tolerance, and the desired pace of change.
2. Timely decisions when competing priorities cannot all be pursued at once.
3. Confirmation of the customer, market, and commercial assumptions that will guide execution.

What you receive

1. Executive marketing direction.
2. Defined objectives, priorities, and decision criteria.
3. Customer and market focus.
4. Initial measures of success and executive expectations.

DECISION GATE Leadership approves the marketing direction, priority order, required business outcomes, and the boundaries that will guide investment and execution.

PHASE 03

ALIGNMENT

Connect every resource to one operating direction.

OBJECTIVE Create an operating model that connects leadership, the internal marketing team, agency partners, sales, business development, technology, data, and analytics around shared priorities.

What happens

1. Define ownership, decision rights, responsibilities, handoffs, meeting cadence, and performance expectations.
2. Align internal marketing responsibilities with agency scopes, specialist capabilities, and sales requirements.
3. Identify capability gaps and determine whether to coach, reassign, add, replace, or procure the needed support.
4. Create visibility across active work so competing requests, duplicated effort, and unowned responsibilities can be resolved.

What we need from you

1. Participation from leaders and functional owners whose work affects marketing, sales, technology, or the customer experience.
2. Transparency into current agency scopes, contracts, budgets, deliverables, and performance expectations.
3. Support for clear ownership and accountability, including difficult role or priority decisions when required.

What you receive

1. Marketing operating model and responsibility map.
2. Confirmed agency and specialist roles.
3. Meeting, decision, and reporting cadence.
4. Capability plan addressing what stays, what changes, and what must be added.

DECISION GATE Leadership confirms authority, ownership, resources, and the operating cadence required to execute the approved direction.

PHASE 04

EXECUTION

Turn approved direction into coordinated action.

OBJECTIVE Lead the people and partners responsible for execution so priorities become completed work, obstacles are resolved, and performance improves through disciplined decision making.

What happens

1. Translate strategic priorities into an integrated work plan with owners, sequencing, dependencies, and expected outcomes.
2. Lead internal teams, agency partners, and specialists through regular operating meetings and direct performance management.
3. Connect marketing execution with sales activity, customer feedback, technology, data, and business operations.
4. Resolve barriers, make tradeoffs, protect focus, and adjust the plan when evidence or business conditions change.

What we need from you

1. Timely access to decision makers when execution requires a business decision, budget change, or priority tradeoff.
2. Participation from the people accountable for assigned work and accurate visibility into progress and constraints.
3. Leadership support for the agreed priorities when new requests or competing demands emerge.

What you receive

1. Integrated execution plan and active priority management.
2. Clear ownership, timing, dependencies, and expected outcomes.
3. Consistent leadership across the internal team and outside partners.
4. Documented decisions, adjustments, risks, and next actions.

DECISION GATE Execution begins against the approved priorities, with ownership accepted and the first operating cadence active across all responsible resources.

PHASE 05

ACCOUNTABILITY

Make performance visible and decisions easier.

OBJECTIVE Create the measurement, reporting, and executive accountability required to understand what marketing is producing and determine what should happen next.

What happens

1. Connect marketing activity to customer response, opportunity quality, pipeline, revenue signals, cost, and strategic progress.
2. Establish a consistent executive reporting cadence with findings, implications, decisions, and recommended actions.
3. Review performance with the internal team and agency partners, then address missed commitments, weak results, or changing conditions.
4. Use evidence to improve priorities, investment, execution, and resource decisions over time.

What we need from you

1. Agreement on the business measures that matter and access to the systems required to evaluate them.
2. Leadership participation in scheduled performance reviews and timely resolution of decisions or constraints.
3. Shared accountability across marketing, sales, agency partners, and other contributors to growth.

What you receive

1. Executive performance view with defined measures and reporting cadence.
2. Clear interpretation of performance, not simply a collection of metrics.
3. Documented decisions, ownership, risks, and corrective actions.
4. An ongoing improvement cycle connecting evidence to the next leadership decision.

DECISION GATE Leadership approves the performance measures, reporting format, review cadence, and accountability expectations that will govern the engagement.

AFTER ONBOARDING

The ongoing leadership cadence

Onboarding establishes the operating foundation. The engagement then moves into a consistent leadership cadence that keeps priorities, execution, performance, and decisions connected.

LEADERSHIP ALIGNMENT	Confirm business changes, priorities, decisions, and executive expectations.
OPERATING LEADERSHIP	Lead internal teams and partners, resolve constraints, and maintain execution discipline.
PERFORMANCE REVIEW	Interpret results, assess contribution, and determine corrective action.
EXECUTIVE REPORTING	Provide visibility into progress, risks, decisions, and recommended next steps.
CONTINUOUS IMPROVEMENT	Use evidence to refine direction, resources, execution, and investment.

Mark Powers

Embedded Fractional CMO

Michigan CMO | mark@michigancmo.com | www.MichiganCMO.com