

Marketing plan

Twelve months on two pages, for an in-house marketing team. Write it before the year starts, share it with whoever signs off on the money, and open it again every quarter. If a line cannot be checked later, rewrite it until it can.

Company or team

Plan owner

Plan year

Total budget

1 Where we are now

Use last year's numbers, not impressions, and name the one change that matters most for the year ahead.

What worked last year

What did not

The biggest change since last year (market, product, team or competitors)

2 Goals for the year

Two or three goals, each with a number and a date, because a fourth goal usually means none of them gets priority.

Goal

Target and date

How we will measure it

3 Who we sell to

Describe the buyer so a new hire would recognize them, then list everyone else who gets a say in the purchase.

The main buyer, and what they need to believe

Who else is in the decision

4 Why they should pick us

Why a buyer should pick you over what they would do instead, in one sentence a salesperson would say out loud.

5 Channels and where the money goes

List every channel, including the ones you are cutting, so the trade-offs are visible to whoever signs off.

Channel	Share of budget	What it has to do	Owner

6 Campaign calendar

The big pushes, quarter by quarter: three campaigns with real people and money behind them beat twelve monthly themes.

When	Campaign	Goal it serves	Main assets	Owner

7 How we will measure it

The few numbers you report every month and where each one comes from, so nobody argues about the source later.

Numbers we report every month	Where each number comes from

8 Owners and reviews

Who signed off on the plan, who can change it, and the dates it gets checked against the numbers above.

Review dates	Signed off by (name and date)
Q1 review	
Q2 review	
Q3 review	
Year-end review	

Worked example

A filled plan for a B2B software company

A sample to show the level of detail that works. The company and the numbers are illustrative.

1 Where we are now

Webinars with customers on the panel brought in 40% of qualified leads. Paid social took a quarter of the money and produced almost no pipeline. A funded competitor now outspends us on search.

2 Goals for the year

Qualified pipeline from marketing up from \$4M to \$6M by December 31. 120 new customers on the mid-tier plan within two quarters of its Q2 launch. Branded searches up 30% by year end.

3 Who we sell to

Heads of operations at logistics companies with 200 to 2,000 staff, who need to believe setup takes weeks, not a year. Finance signs off above \$50k, IT reviews security, and the planners who use it daily can block it.

4 Why they should pick us

Live in four weeks without hiring a consultant, so the operations team sees results this quarter, not next year.

5 Channels and where the money goes

Channel	Share	What it has to do	Owner
Events and webinars	35%	Qualified pipeline and customer proof	Events lead
Paid search	25%	Catch buyers who are already searching	Growth lead
Video and content	25%	Explain the product, feed other channels	Content lead
Paid social	15%	Retargeting only, down from 30%	Growth lead

6 Campaign calendar

Q1 customer webinar series (events lead). Q2 mid-tier launch: video, landing page, sales deck (product marketing). Q3 industry report (content lead). Q4 four case studies and two testimonial videos (content lead).

7 How we will measure it

Pipeline from marketing, mid-tier sign-ups and branded searches, every month, from the CRM and Search Console.

8 Owners and reviews

Owner: VP Marketing. Reviews April 10, July 10, October 9, January 15. Moving over 10% between channels needs the CFO.

Before you share it

Eight checks. Fix anything that fails now, before the plan reaches the people who fund it.

- ☐ Every goal has a number and a date.
"Grow awareness" cannot be reviewed in July. "30% more branded searches by December" can.
- ☐ There are no more than three goals.
If everything is a priority, the team picks its own, and they will not match yours.
- ☐ A new hire could spot the buyer from field 3.
A job title is not enough. Add what they need to believe before they buy.
- ☐ The positioning line names the real alternative.
Often that is a spreadsheet, an in-house fix or doing nothing, not a named competitor.
- ☐ The channel shares add up to 100%.
It sounds obvious, and it is still easy to get wrong in a first draft.
- ☐ Each campaign serves one of the goals.
If a campaign maps to no goal, cut the campaign or change the goal.
- ☐ Every channel and campaign has one named owner.
A team name is not an owner, and two owners means nobody.
- ☐ The review dates are already in the calendar.
A plan nobody reopens is out of date by March.

The quarterly review, in 45 minutes

Run it on the dates in field 8. Bring the numbers, not slides.

- 0 to 10** Goals against target
Each goal owner gives the number and one sentence on why.
- 10 to 25** Channels: keep, fix or cut
Move money from the weakest channel to the strongest, and write down why.
- 25 to 40** Next quarter's campaign
Confirm the assets, the dates and the owner. Write its brief the same week.
- 40 to 45** Update the plan
Edit the document before the meeting ends, so nobody works from an old version.