Annual marketing strategy framework

**1. Business objectives**

Define your company-wide business goals for the year.

E.g.

* Achieve $10M in ARR by Q4
* Expand into the US market
* Improve customer retention to 90%

**2. Marketing goals**

Outline marketing-specific goals (e.g., increase brand awareness, generate pipeline, reduce churn).

E.g.

* Drive $5M in marketing-sourced pipeline
* Increase brand awareness in the US by 30%
* Support CS team to improve onboarding NPS by 10 points

**3. Key metrics**

Identify how you’ll measure success (e.g., MQLs, SQLs, CAC, LTV, Brand Awareness %).

E.g.

| **Metric** | **Goal** |
| --- | --- |
| **MQLs** | 6,000 |
| **SQLs** | 3,000 |
| **CAC** | <$800 |
| **Brand search volume** | +25% YoY |
| **Marketing-influenced revenue** | $7M |

**4. Audience & segments**

Define your ICPs and target segments for each key initiative.

E.g.

* Primary: Mid-market B2B SaaS companies (50–500 FTE) in UK and US
* Buyer persona: CMO, VP Marketing
* Influencers: Head of RevOps, CEO
* Segment priority: Tier A = US Tech, Tier B = UK Fintech

**5. Channel strategy**

Break down primary channels and tactics by stage of the funnel.

E.g.

* Top-of-funnel: Paid Social (LinkedIn), Podcasts, PR
* Mid-funnel: SEO, Webinars, Product-Led Content
* Bottom-of-funnel: Retargeting, Email Nurture, Case Studies

**6. Campaign themes**

List major themes or narratives to run throughout the year.

E.g.

* “The anti-vendor approach” → Positioning us as a partner, not a vendor
* “Growth without waste” → Efficiency-focused messaging in economic downturn
* “Your data, your terms” → Highlighting our privacy-first approach

**7. Content Plan**

Highlight cornerstone content pieces, formats, and distribution approach.

E.g.

* Q1: Product-led whitepaper + founder video series
* Q2: “Marketing Efficiency Toolkit” launch with email + paid support
* Always-on: Weekly blog content, 3 LinkedIn posts per week, monthly webinar

**8. Budget summary**

Provide a high-level overview of budget allocation.

E.g.

| **Channel** | **Budget %** |
| --- | --- |
| **Total budget** | $850,000 |
| **Brand** | 20% |
| **Performance marketing** | 40% |
| **Content** | 25% |
| **Events/PR** | 10% |
| **Tools & tech** | 5% |

**9. Team structure**

Detail current team and any planned hires or role changes.

E.g.

* Current team: 1 Head of Content, 1 PMM, 1 Growth Marketer
* Planned hires: Senior Content Marketer (Q2), Marketing Ops Lead (Q3)
* Outsourced: SEO, Paid Social (agency)

**10. Risks & assumptions**

List known risks, dependencies, and assumptions.

E.g.

* Risk: Low dev resourcing may block product-led content
* Risk: International expansion delays affect US campaign impact
* Assumption: Churn will remain <12%

**11. Timeline & milestones**

Outline major campaigns, launches, and reviews by quarter.

E.g.

* Q1: Launch new website + brand refresh
* Q2: Product launch + content campaign
* Q3: Enter US market with paid + earned media push
* Q4: Annual event + partner co-marketing blitz