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

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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

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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