

SCALE

Marketing council:
How to craft a great marketing plan

Today's agenda

- **Welcome & introduction**
- **Principles & process for designing a marketing plan**
- **Templated plan**
- *Bonus: Sign up for a jam session!*

Jam sessions: 2026 marketing planning

Why

- **Validate** strategic choices around ICP, positioning, and messaging
- **Review** the assumptions and research behind your plan
- **Prioritize** critical activities for 2026
- **Uncover** potential gaps in your plan
- **Assemble** advisory resources to help you attain your plan goals

What

1-2 hour live review session (please send us your marketing plan in advance)

Who



Pete Giordano
Scale CMO EIR



Sydney Sloan
Scale CMO EIR

Principles & Process



5 characteristics of a great plan

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- 4 Your leaders can **execute it**

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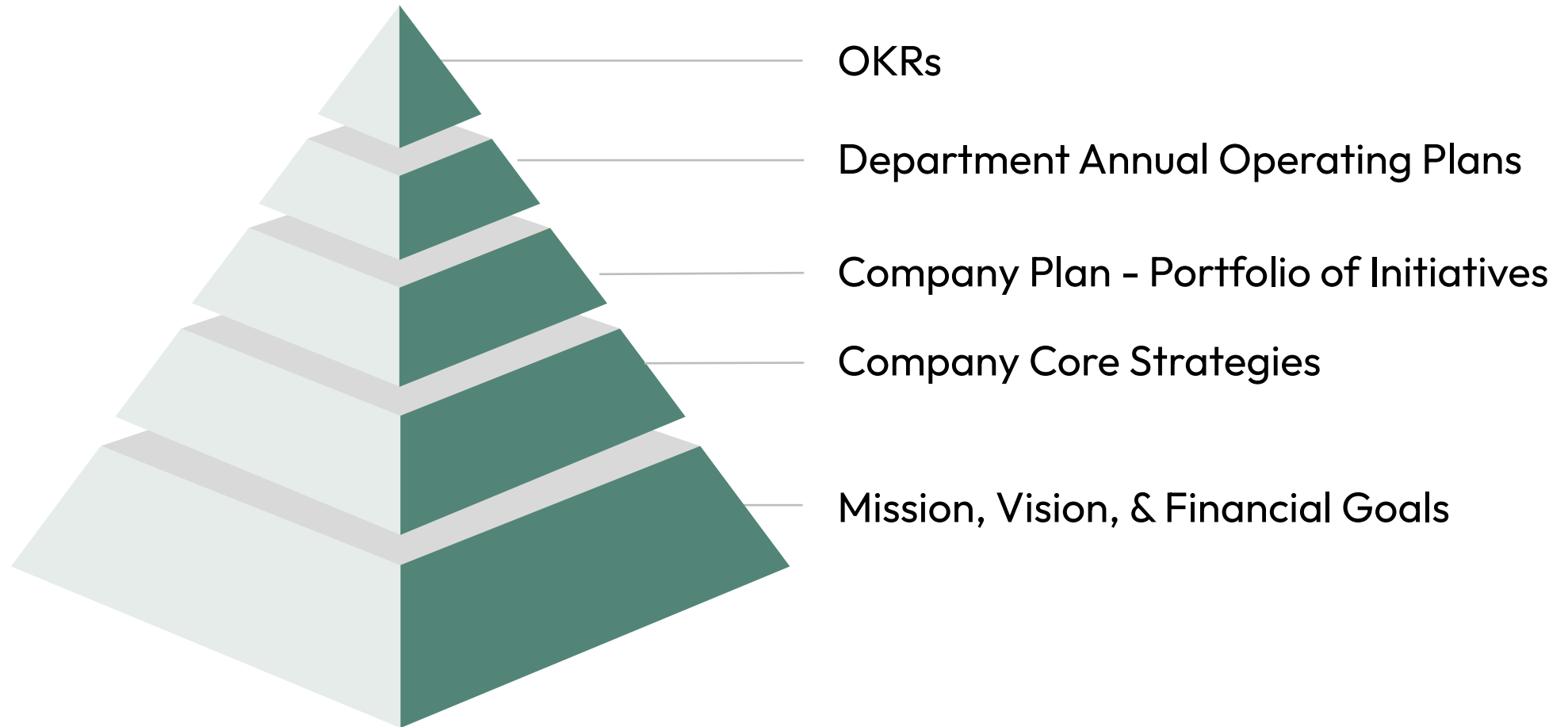
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5 **ICs understand** how what they do supports the plan

How the planning processes build on each other



Every layer aligns and sits upon the layer below it, building up from mission and vision, driving all the way to OKRs and what's most important to execute right now

Start with the planning timeline

We are here

**Leadership Team
Offsite**
<date>

- Reflection
- Performance metrics and goals
- Big Ideas!
- 1H marketing initiatives
- AI use case identification

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- GTM shared goals
- Product roadmap / launch alignment (themes!)
- Regional alignment w/ sales
- Segment / Regional DG plans

Sample timeline

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**Finalized plan &
budget**
<date>

- Key marketing targets & investment finalized
- Priority alignment w/ Rev and product teams
- 2H goals and budget locked

Big ideas workshop

- Pre-work
- Each leader presents an idea
- Brainstorm new ideas
- Categorize them
- Make it “their idea” and plan



Note: Great exercise to get new ideas on the table before starting to get into the detailed planning

Marketing plan template

What's included in the plan

- ① Previous Year Highlights & Lessons
- ② Marketing Team Mission / Charter
- ③ Company Goals
- ④ Marketing Team Goals
- ⑤ Key Initiatives
- ⑥ Organizational Plan (current & future state)
- ⑦ Budget

Previous year highlights & lessons learned

FY Highlights

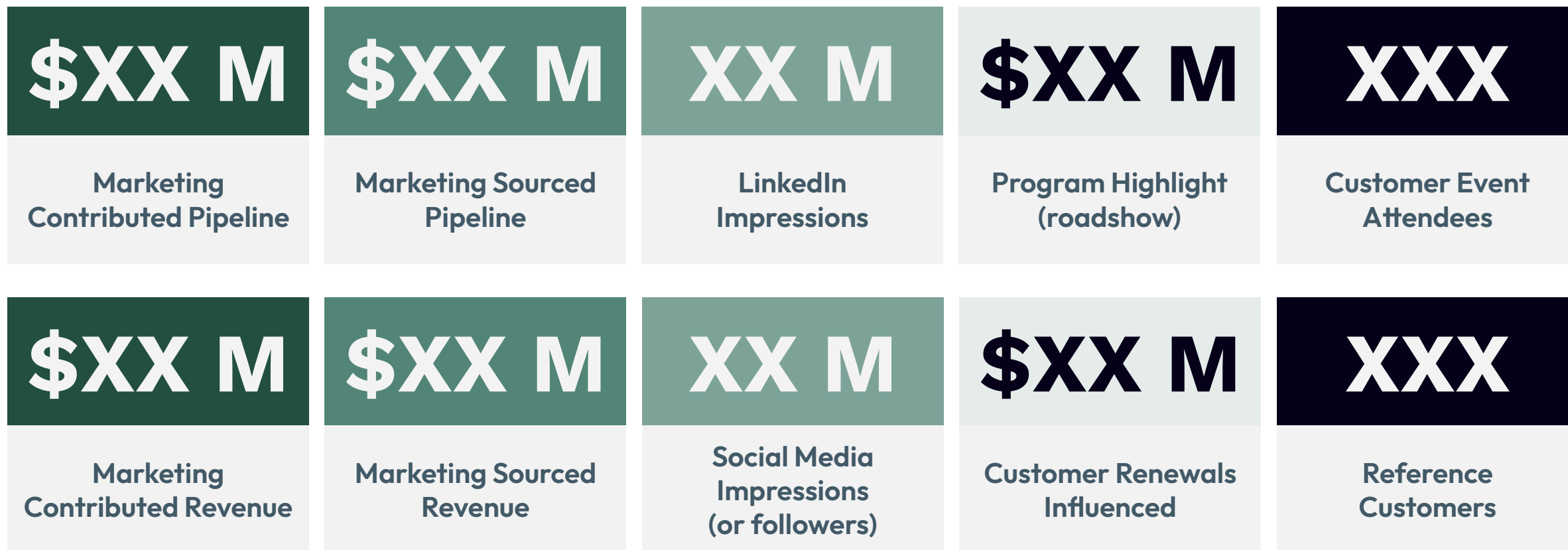
- Roadshows influenced \$XXM in revenue and ROI 5x
- Implemented X product or agent use cases
- New pricing and packaging increased ASP by X%
- Customer champions program grew by X%
- Built new website experiences that converted X% of Y

Lessons Learned

- Cross-functional alignment with...
- Program level insights...
- Partnerships...
- Slow follow up on trade show leads...
- Need more customer education on

Note: You can build this from a Stop / Start / Continue exercise

Marketing performance - year in review



Note: You could also add % improvement yr/yr

New company goals



Financial Goals



Key Initiatives



**Changes from
previous years**

Note: For a great primer on setting company-wide goals, check out our whitepaper [here](#)

Marketing goals - new

\$XX M	\$XX M	XX M	\$XX M	+XX
Marketing Contributed Pipeline	Marketing Sourced Pipeline	LinkedIn Impressions	New Product Revenue	eNPS
\$XX M	\$XX M	XX M	\$XX M	XX K
Marketing Contributed Revenue	Marketing Sourced Revenue	Social Media Impressions (or followers)	Customer Renewals Influenced	Customer Community

Annual marketing plan overview

Mission	Establish <company> as the #1 recognized global leader in <category> by customer NPS and market share.			
Key Initiatives	<div>Be the Leading Brand Be the # 1 market leader as measured by share of voice, peer review sites, analyst evaluations and competitive win rates.</div> <div>New brand & activation campaign</div> <div>Category Leadership</div> <div>Maintain #1 in analyst & peer reviews</div> <div>Battle level product positioning</div> <div>Quarterly integrated launch</div>	<div>10X our Marketing Engine Build marketing engine to enter new markets, drive engagement and improve pipeline conversions.</div> <div>Drive increase in website conversions</div> <div>Inbound marketing engine</div> <div>Marketing engine performance model</div> <div>EMEA expansion</div> <div>Partner co-marketing program</div>	<div>Renew the AI First Customer Experience Reimagine an AI powered customer experience from first touch to ongoing engagement.</div> <div>Audit and identify new workflows and tech</div> <div>Implement Web Agents across customer journey</div> <div>Create a single learning center on the web</div> <div>Optimize content for AEO</div> <div>Launch Customer Summit</div>	<div>Prioritize Team Health Marketing's culture is an example to other teams as a model of a high functioning, healthy department.</div> <div>Team fulfillment and motivation</div> <div>New Team Onboarding experience</div> <div>AI Training & empowerment</div> <div>Career pathing & role clarity</div> <div>Personal development plans</div>
Metrics	Brand Awareness / Ranking	Website Conversions, Marketing Sourced Demos / Pipeline / Rev	Response timing, Pipeline influence, Net retention	Emplify score > 80
Teams	(lead, names)	(lead, names)	(lead, names)	(lead, names)

Be the leading brand

Initiative	Current State	1H Projects	1H Measurement
Launch new brand <i>Owner: Name</i>	Original brand with many interactions in the wild.	<ul style="list-style-type: none"> • Partner w/ brand agency to develop new narrative • Inventory all current existing assets • Determine phases for roll out • Align with website project 	<ul style="list-style-type: none"> • Launch influence • % of assets updated • Customer conference experience
Category Leadership <i>Owner: Name</i>	Lack of influence. Targeted incentivized review campaigns supporting category health model	<ul style="list-style-type: none"> • Phase 1: Identify categories and influencers, scoping, aligning to target personas • Phase 2: Launch program across analysts, industry influencers and partners 	<ul style="list-style-type: none"> • Engagement in category • Category depth • Best of Software list • Cloud 100
Own LinkedIn <i>Owner: Name</i>	Company page focus	<ul style="list-style-type: none"> • Influencer programs • Founder / Executive engagement • Research publishing strategy • Company-wide leaderboard (Sprout Social) 	<ul style="list-style-type: none"> • Net new followers • Impressions (Employees + Influencers)
New Product Launches <i>Owner: Name</i>	Random acts of effort.	<ul style="list-style-type: none"> • Build launch program & templates • Launch theme /innovation story • 	<ul style="list-style-type: none"> • Customers engaged • Beta customers • Product usage

Note: This is a high level “plan on a page” concept that can [then link](#) to more specific plans

10X our pipeline

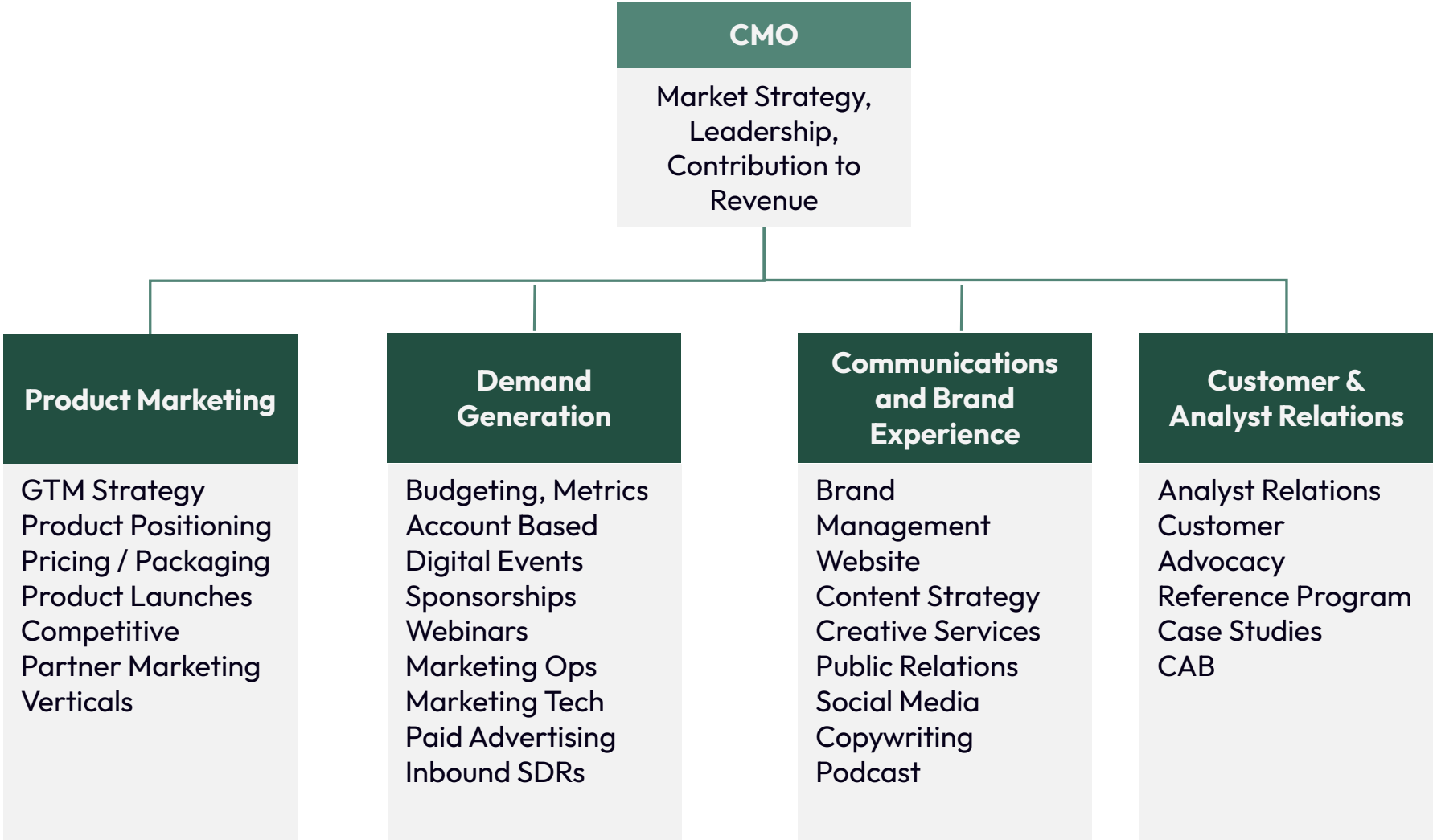
Program	1H Projects	1H Measurement
Campaign Name <i>Owner: name</i>	Build content for full funnel based on value, use cases, personas, product alignment and segments <ul style="list-style-type: none"> • Partner implementation - shared offers, shared webinars, co-hosted events • Webinar program - target account, person-focused webinars speaking to the pillars of the R2R playbook • Field events - roadshows, lunch and learns, digital experiences 	<ul style="list-style-type: none"> • Opps created by program for Target accounts • Enable 100% of revenue org on new message and talk tracks • Increase closed won attribution • Influence 90% of T1 and T2 accounts in the campaign
ABM Program Maturity <i>Owner: Name</i>	<ul style="list-style-type: none"> • Fully implement ABM Predictive Model with SLAs and routing for qualified accounts • Focus on building out campaign calendars, nurture programs, and conversion to opportunity for all programs • Updated persona research to feed 1:1 and 1:Few ABM campaigns; focus on (target) persona 	<ul style="list-style-type: none"> • Engaging >90% of top 1k target accounts with 10+ impressions and seeing stage progression for 20% of them.
Global Field Marketing <i>Owner: name</i>	New Programs: Executive Dinners, breakfasts, gifting: <ul style="list-style-type: none"> • NEW EMEA customer event (Feb) • NEW: Partner Offers • NEW: Global Roadshow • NEW: Quarterly virtual roundtables 	<ul style="list-style-type: none"> • Increase Opp to Closed Won conversion by 5% • Influence 80% of expansion revenue opportunities

Plan

				Themes		Committed		Researching				
Q1			Q2			Q3			Q4			
Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	
thought leadership theme			thought leadership theme (revised)								Second R2R AI Webinar	
Top Trends in XX						State of XX		R2R AI Webinar			State of AI Report	
			Podcast									
Brand+Site Refresh P1	Brand+Site Refresh P2	Brand+Site Refresh P3				Brand Campaign						
							LinkedIn takeover			LinkedIn takeover		
Theme												
Target Account offer	Segment Specific	Webinar	Webinar	Segment # 2		TA Revamp	Segment	Partner Offers	New Offer	Webinar	Best of	
									Webinar			
Upsell Campaign	Segment Specific	Customer Roundtable	Virtual Event	Roundtable/ Networking		Upsell Nurtures						
Champions Program	Health Check	Office Hours							Li: Retargeting: Open ops + sales priority accs + at risk			
								EAB				
Customer Onboarding Course	Best Practice Guide	Cust. Action Plan Course		Cust. Action Plan Course	Customer Guide	New Product Guide	Cust. Action Plan Course	New Certification	Customer Event	Customer Guide	Newly Funded	
											Product Audit x2	
	Exec Dinner	Partner's Summit	Event	Roadshow PARIS	Summer Social	Brand Event	Roadshow LON	Event	.Event		Accel. Event	
Pipeline Accel. Event	Rev Leaders Event		Executive Breakfast			T1 Event	Event	Accel. Event	Event			
	Chilipalooza					VIP Dinner						
		Roadshow NY	Roadshow SF		T1 Event	Event						
				Roadshow BOS		Golf Event	VIP Event	Roadshow ATL	Event	Holiday Gifting		
Launch Theme										Launch Theme		
	Q1 Innovation Webinar			Q2 Innovation Webinar		New Pricing	Q3 Innovation Webinar			Q4 Innovation Webinar		
						Sunset Product						

Org design

Org Structure: Current State



Core Objectives:
What are your team’s biggest current investment areas

Key Hires and Structure Changes:
What changes have taken place since your last update?

Key Differences from Previous Plan:
Commentary on the impact of previous changes

Org Structure: Next State – FY27

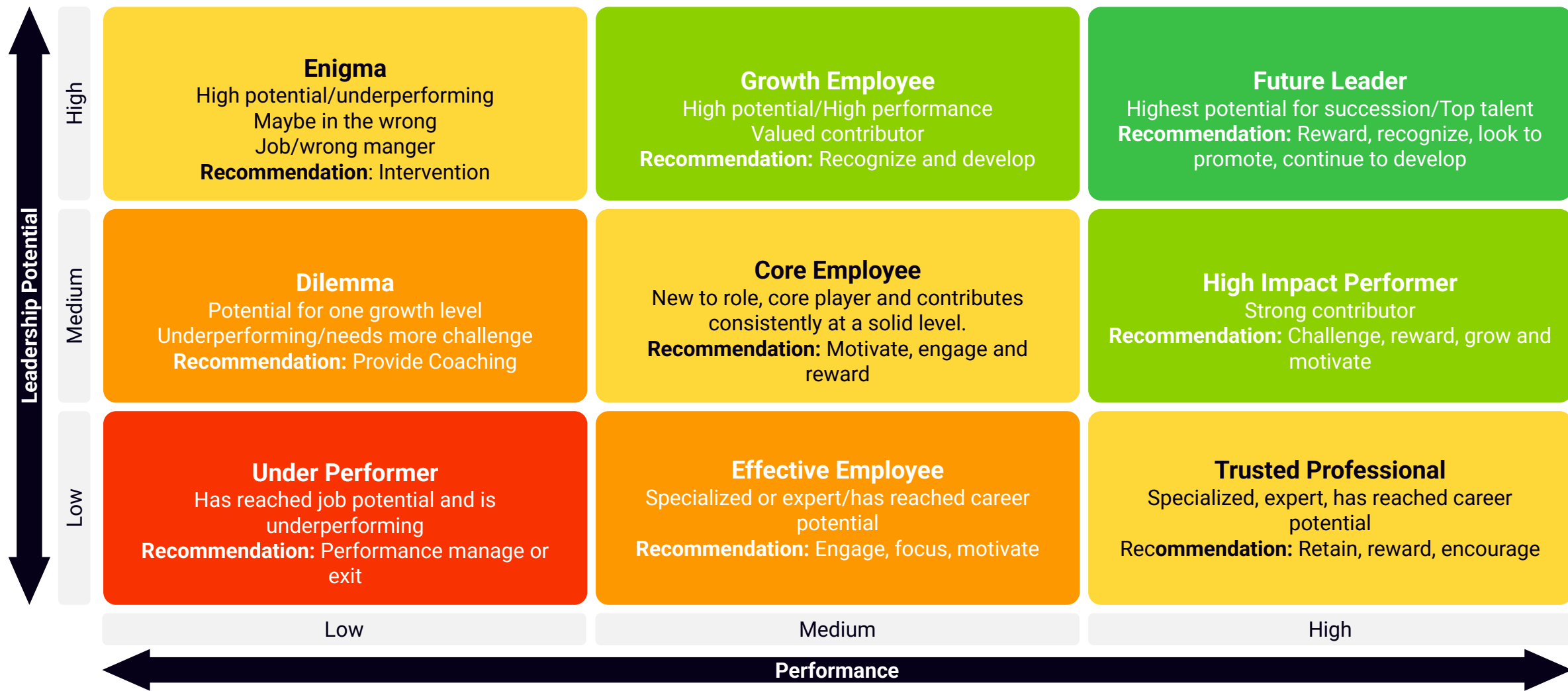


Core Objectives:
What are the new areas you want to invest and what are the expected outcomes?

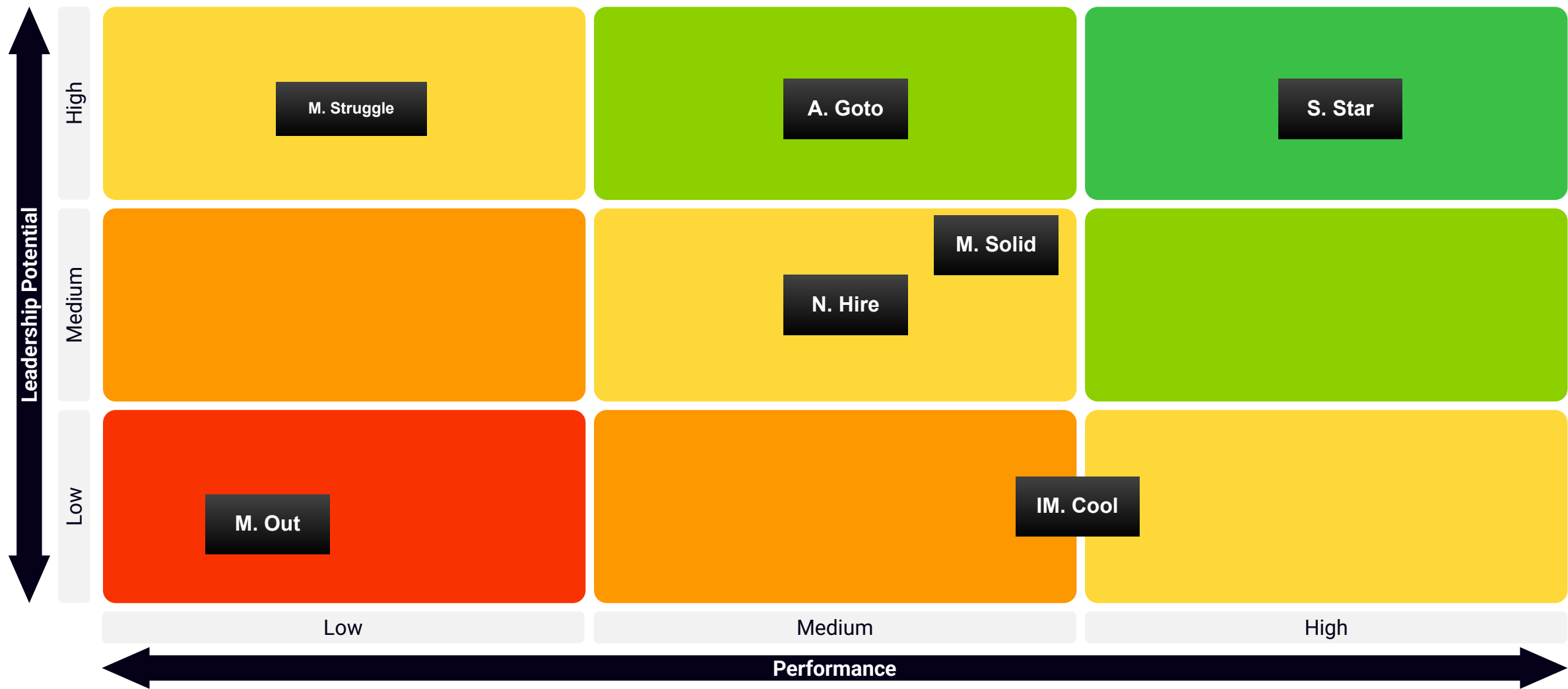
Key Hires and Structure Changes:
What specific functions / talent / capacity would you like to add to the team and why?

Key Differences from Previous Plan:
What specific experience are you looking to add? How is AI impacting org? Who are you developing for new roles and what skills are you going to add to the team. How does this contribute to company goals.

Introduction to the Nine Box Talent Matrix



<Department> team assessment



Talent assessment

Individual		L	Current Title	Assessment with areas of coaching	PDP (linked)
xx		M7	xx	xx	
xx		P6	xx	xx	
xx		M6	xx	xx	
xx		P4	xx	xx	
xx		M7	xx	xx	
xx		P4	xx	xx	

Budget



Budget template ([here](#))

SCALE						
(COMPANY)(DEPT) BUDGET		% of Overall Budget	TOTAL (Prev FY)	TOTAL (Current FY)	YoY Change	
Corporate Marketing	(budget owner name)	15%	\$ 20,000	\$ 35,000	75%	
Customer Marketing	(budget owner name)	2%	\$ 10,000	\$ 4,000	-60%	
Demand Generation	(budget owner name)	38%	\$ 25,000	\$ 90,500	262%	
GTM Operations	(budget owner name)	13%	\$ 20,000	\$ 30,000	50%	
SDR / BDR	(budget owner name)	5%	\$ 10,000	\$ 11,000	10%	
Product Marketing	(budget owner name)	7%	\$ 12,000	\$ 16,000	33%	
Partner Marketing	(budget owner name)	4%	\$ 8,000	\$ 10,000	25%	
General Marketing	(budget owner name)	17%	\$ 17,500	\$ 39,000	123%	
TOTAL PROGRAM BUDGET			122,500	235,500	92%	
	Headcount					
	Travel					
	Other					
TOTAL HEADCOUNT AND INFRASTRUCTURE				462,200	#DIV/0!	
	Dependent on corporate Budget					
TOTAL SPEND				697,700	#DIV/0!	
TOTAL FINANCE Budget				2,085,000	#DIV/0!	