

# 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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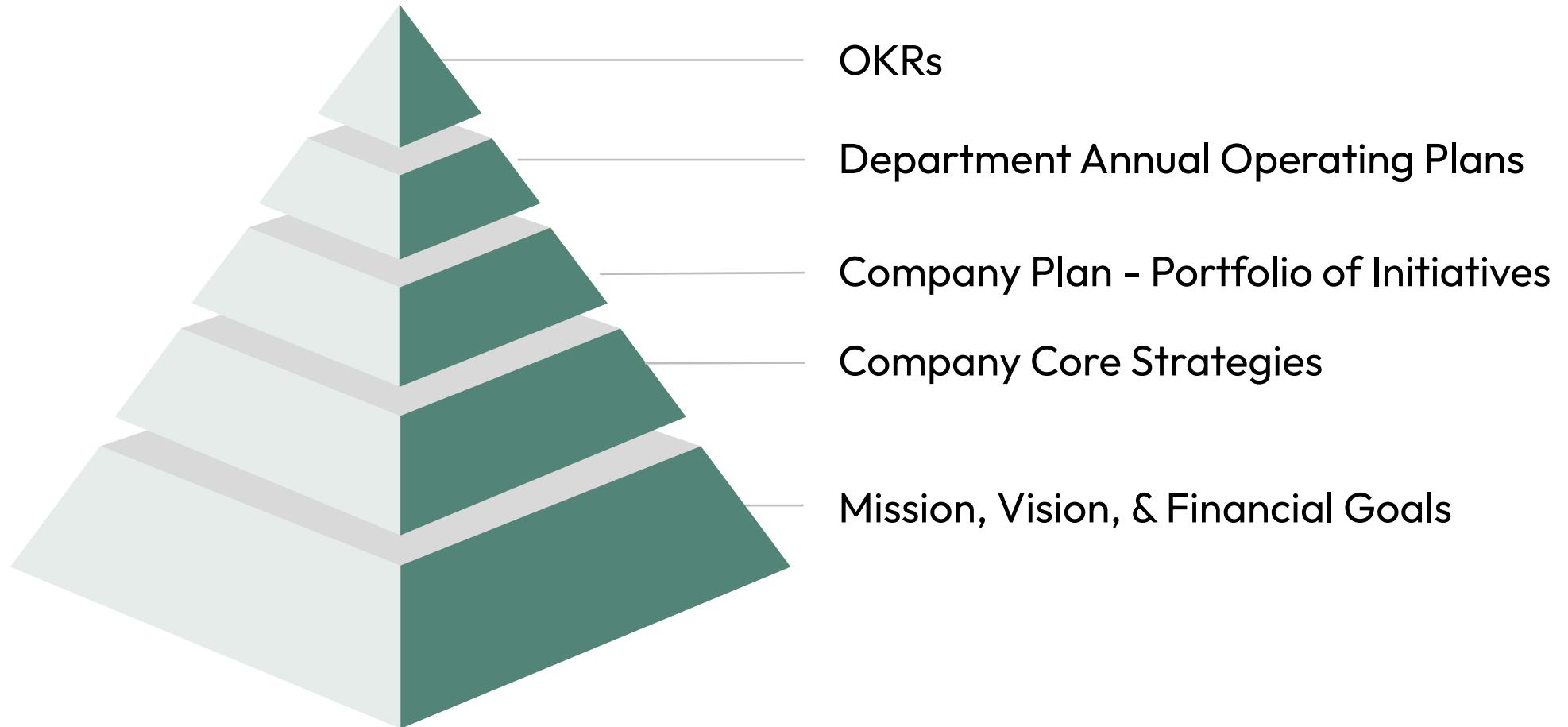
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- 4 Your leaders can **execute it**

# 5 characteristics of a great plan

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- 4 Your leaders can **execute it**
- 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

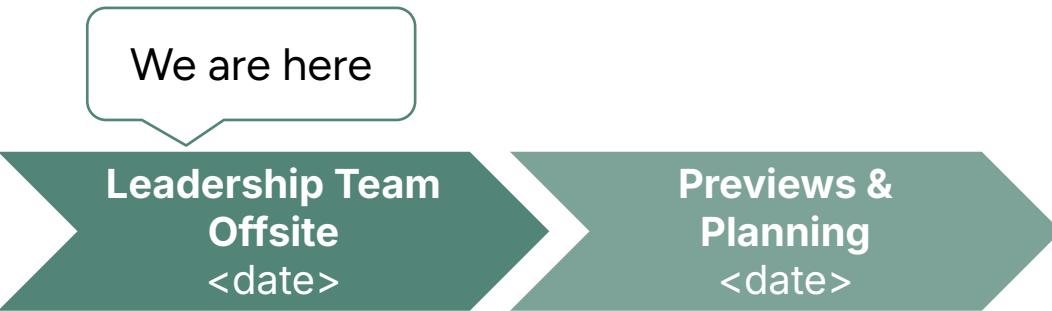
# Start with the planning timeline

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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- Share initial ideas with departmental teams
- Other team or x-functional offsites
- PM / PMM launch theme working sessions
- Marketing program performance analysis & budget reconciliation

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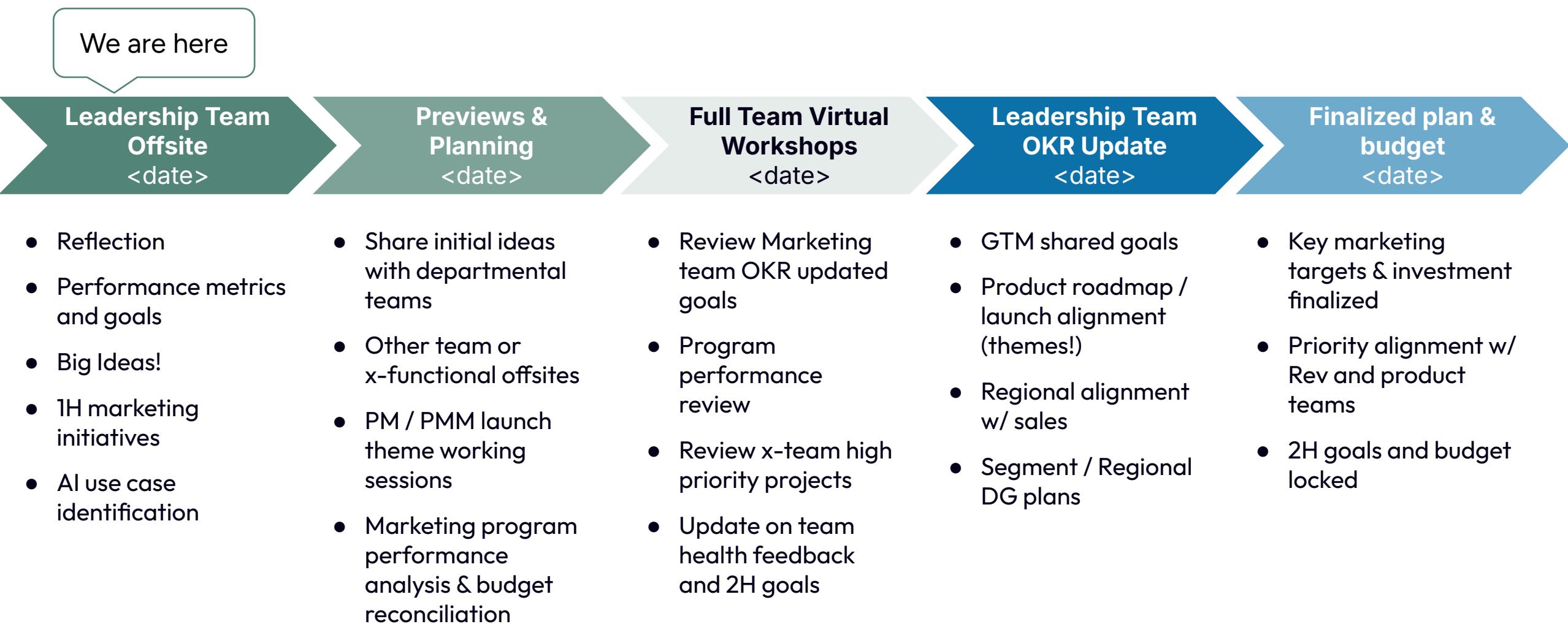
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- Review Marketing team OKR updated goals
- Program performance review
- Review x-team high priority projects
- Update on team health feedback and 2H goals

# Start with the planning timeline

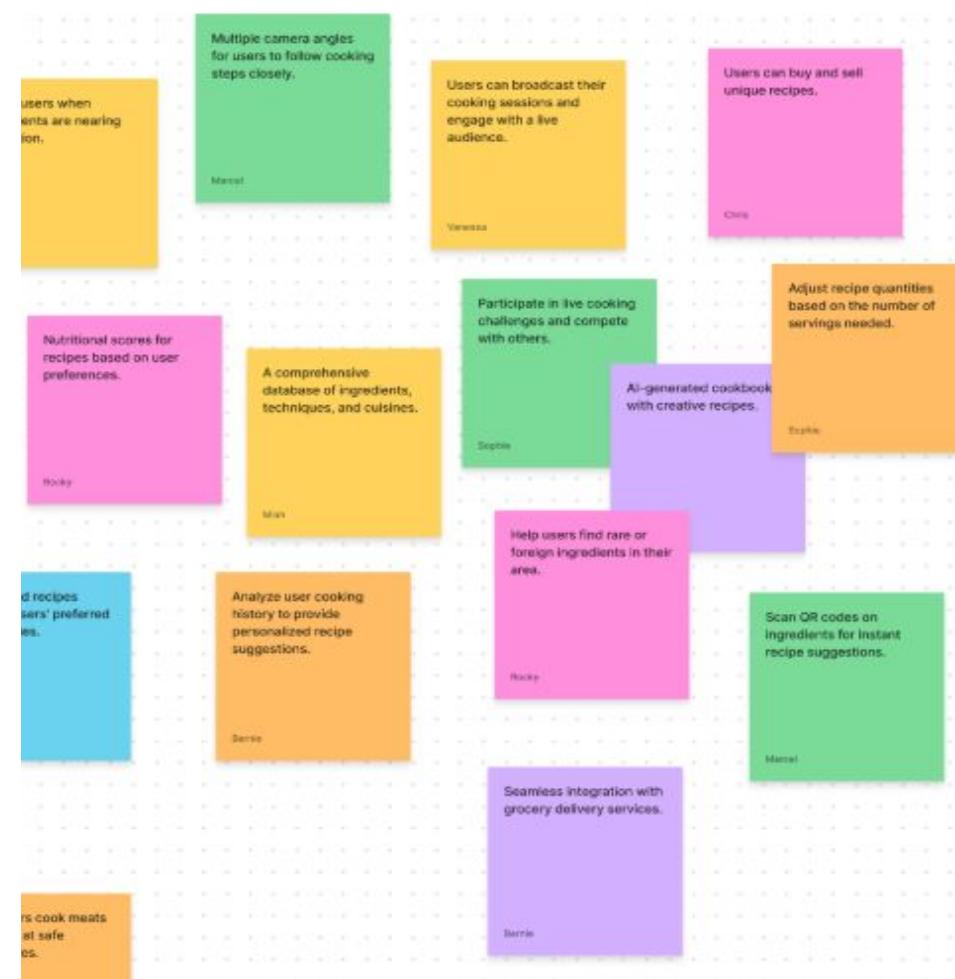


# Sample timeline



# 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

**\$XX M**

Marketing  
Contributed Pipeline

**\$XX M**

Marketing Sourced  
Pipeline

**XX M**

LinkedIn  
Impressions

**\$XX M**

Program Highlight  
(roadshow)

**XXX**

Customer Event  
Attendees

**\$XX M**

Marketing  
Contributed Revenue

**\$XX M**

Marketing Sourced  
Revenue

**XX M**

Social Media  
Impressions  
(or followers)

**\$XX M**

Customer Renewals  
Influenced

**XXX**

Reference  
Customers

**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	<b>Be the Leading Brand</b> Be the # 1 market leader as measured by share of voice, peer review sites, analyst evaluations and competitive win rates.	<b>10X our Marketing Engine</b> Build marketing engine to enter new markets, drive engagement and improve pipeline conversions.	<b>Renew the AI First Customer Experience</b> Reimagine an AI powered customer experience from first touch to ongoing engagement.	<b>Prioritize Team Health</b> Marketing's culture is an example to other teams as a model of a high functioning, healthy department.
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
<b>Launch new brand</b> Owner: Name	Original brand with many interactions in the wild.	<ul style="list-style-type: none"> <li>• Partner w/ brand agency to develop new narrative</li> <li>• Inventory all current existing assets</li> <li>• Determine phases for roll out</li> <li>• Align with website project</li> </ul>	<ul style="list-style-type: none"> <li>• Launch influence</li> <li>• % of assets updated</li> <li>• Customer conference experience</li> </ul>
<b>Category Leadership</b> Owner: Name	Lack of influence. Targeted incentivized review campaigns supporting category health model	<ul style="list-style-type: none"> <li>• Phase 1: Identify categories and influencers, scoping, aligning to target personas</li> <li>• Phase 2: Launch program across analysts, industry influencers and partners</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement in category</li> <li>• Category depth</li> <li>• Best of Software list</li> <li>• Cloud 100</li> </ul>
<b>Own LinkedIn</b> Owner: Name	Company page focus	<ul style="list-style-type: none"> <li>• Influencer programs</li> <li>• Founder / Executive engagement</li> <li>• Research publishing strategy</li> <li>• Company-wide leaderboard (Sprout Social)</li> </ul>	<ul style="list-style-type: none"> <li>• Net new followers</li> <li>• Impressions (Employees + Influencers)</li> </ul>
<b>New Product Launches</b> Owner: Name	Random acts of effort.	<ul style="list-style-type: none"> <li>• Build launch program &amp; templates</li> <li>• Launch theme /innovation story</li> <li>• </li> </ul>	<ul style="list-style-type: none"> <li>• Customers engaged</li> <li>• Beta customers</li> <li>• Product usage</li> </ul>

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

# Plan

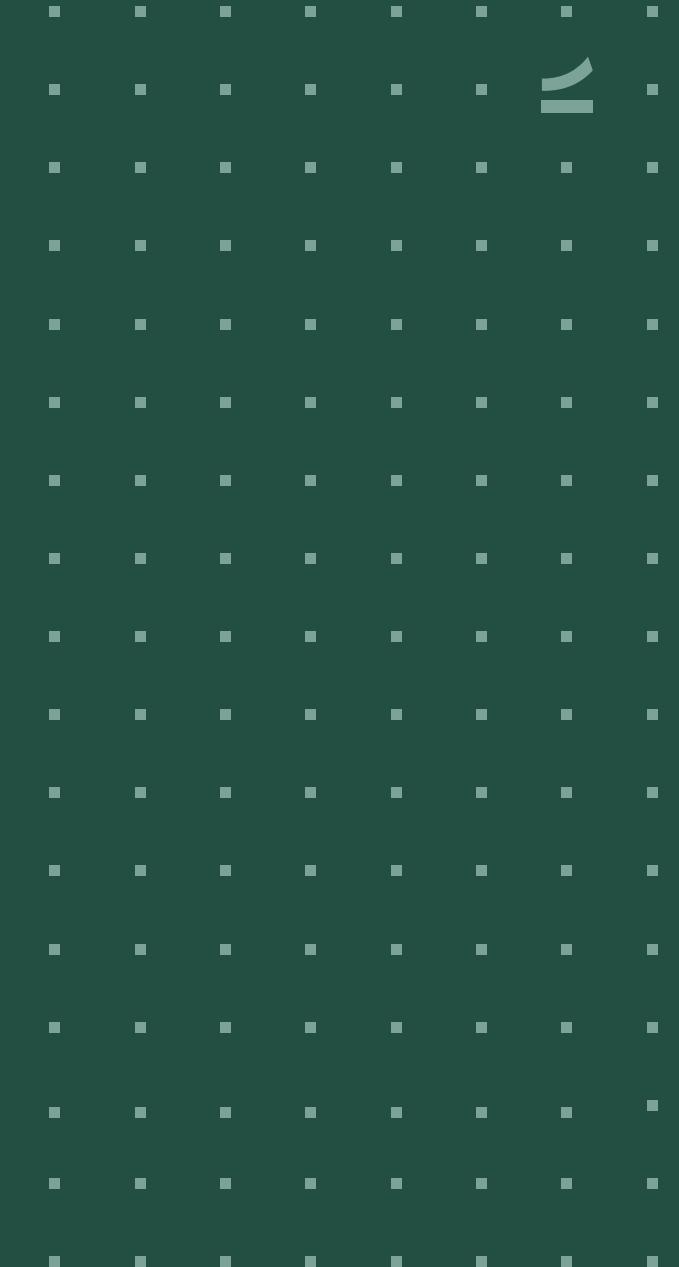
Themes

Committed

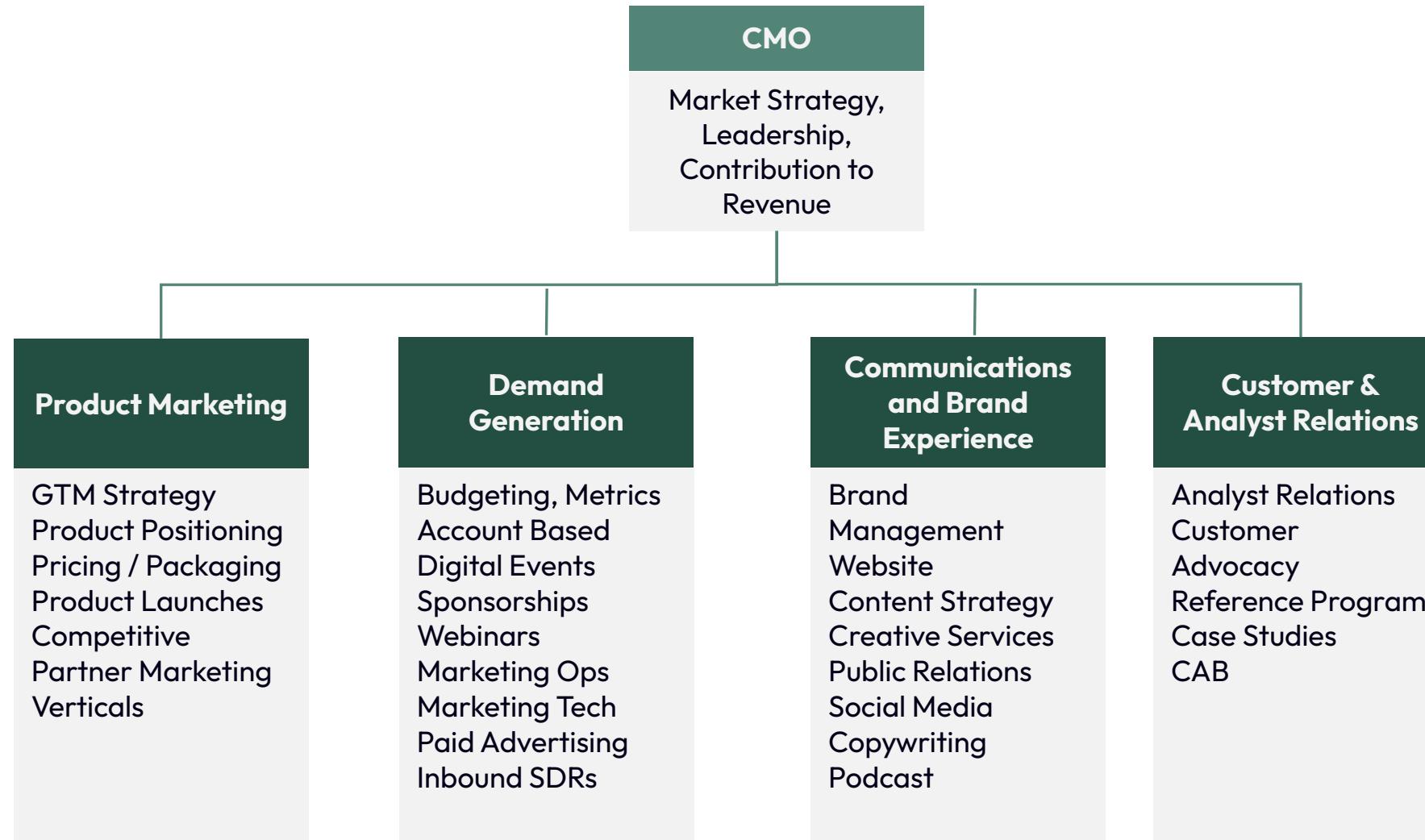
Researching

													Q1	Q2			Q3			Q4				
													Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan
Thought Leadership	thought leadership theme						thought leadership theme (revised)																	
	Top Trends in XX						Podcast			State of XX			R2R AI Webinar						Second R2R AI Webinar					
Brand Awareness	Brand+Site Refresh P1	Brand+Site Refresh P2	Brand+Site Refresh P3							Brand Campaign									LinkedIN takeover					
	Theme																LinkedIN takeover							
Integrated Campaigns	Target Account offer	Segment Specific	Webinar	Webinar	Webinar	Segment # 2				TA Revamp	Segment	Partner Offers	New Offer	Webinar	Webinar	Best of								
	Upsell Campaign	Segment Specific	Customer Roundtable	Virtual Event	Roundtable/ Networking				Upsell Nurtures			EAB	Li: Retargeting: Open ops + sales priority accs + at risk											
Customer Experience	Champions Program	Health Check	Customer Roundtable	Office Hours							Customer Event			Customer Guide			Newly Funded			Product Audit x2				
	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					
Education	EMEA	Exec Dinner	Partner's Summit	Event	Roadshow PARIS	Summer Social	Brand Event	Roadshow LON	Event	Event	Event	Event	Event	Event	Event	Event	Event	Event	Event	Event	Event	Event	Accel. Event	
		Rev Leaders Event	Roadshow NY	Executive Breakfast				T1 Event	Accel. Event	Accel. Event	Roadshow ATL				VIP Event			Holiday Gifting						
Events & Field	NAMER	Chilipalooza		Roadshow SF	T1 Event	Event	VIP Dinner	Golf Event	Roadshow BOS	Roadshow ATL														
		Pipeline Accel. Event	Launch Theme			Launch Theme			New Pricing			Q3 Innovation Webinar						Q4 Innovation Webinar						
Product Tier 1 Launch		Q1 Innovation Webinar					Q2 Innovation Webinar			New Pricing			Q3 Innovation Webinar											

# Org design



# Org Structure: Current State



## Core Objectives:

What are your team's biggest current investment areas

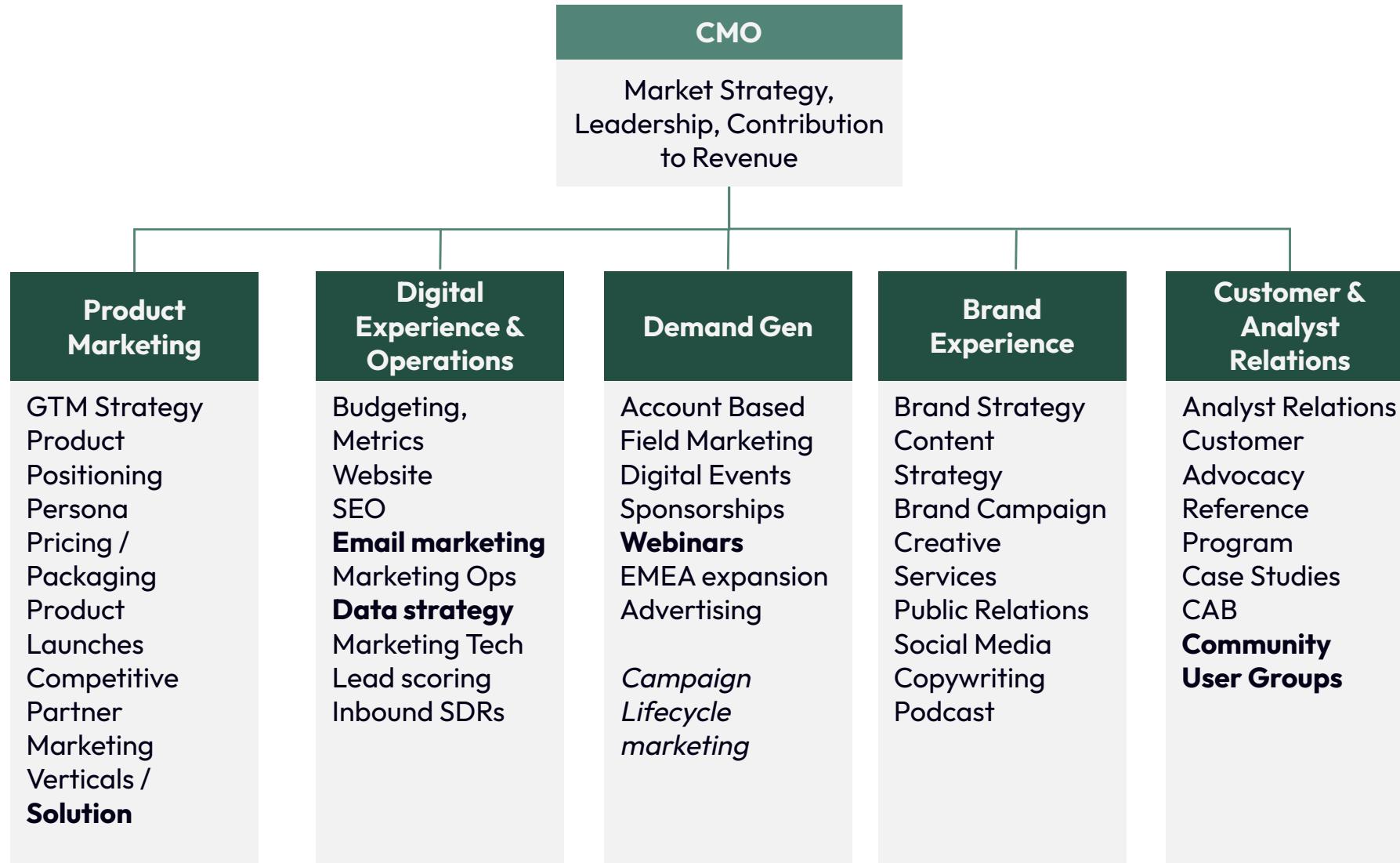
## Key Hires and Structure Changes:

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?

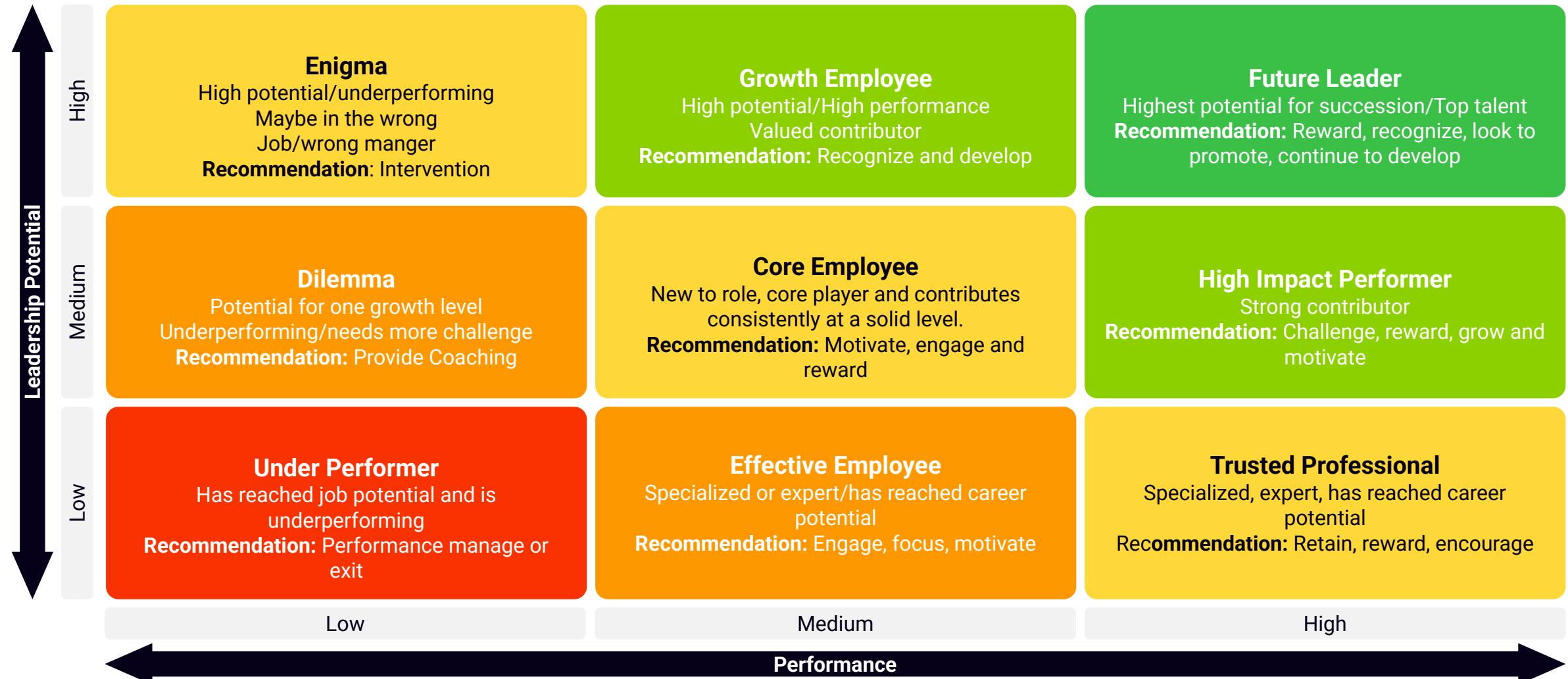
## Key Hires and Structure Changes:

What specific functions / talent / capacity would you like to add to the team and why?

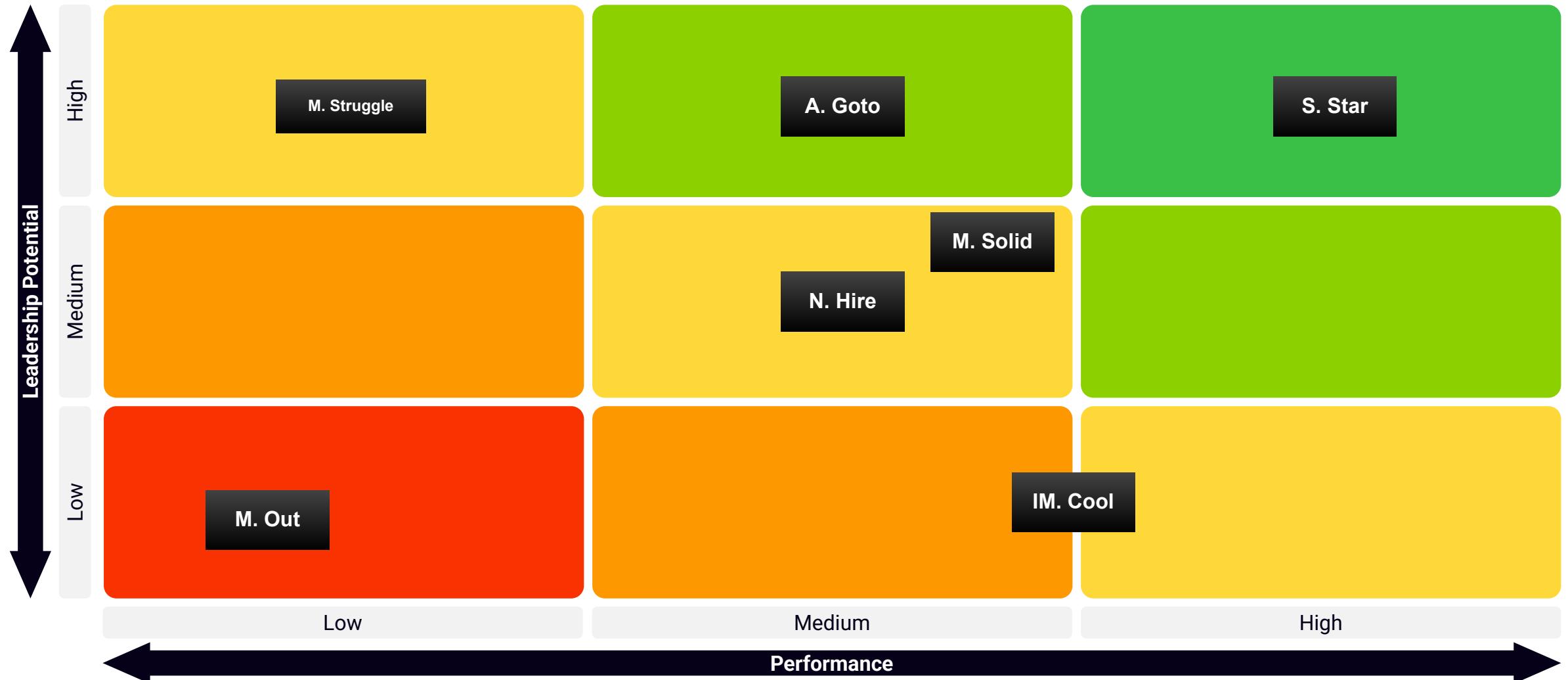
## Key Differences from Previous Plan:

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