

Sample Marketing Plan

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Sales + Marketing + Customer Success (The Big Picture)



Goals

Meetings

Sales Velocity

Usage

BUYERS JOURNEY

Self Directed

Sales Directed

Success Directed

Awareness

Consideration

Purchase

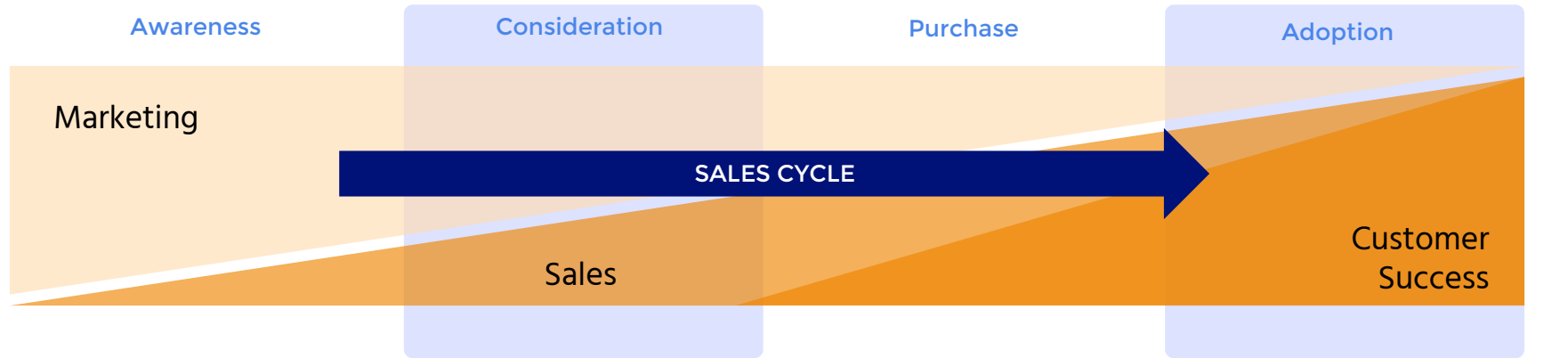
Adoption

Marketing

SALES CYCLE

Sales

Customer
Success



Annual Marketing Goals



1. Generate demand
2. Accelerate sales velocity
3. Drive awareness
4. Improve adoption and engagement

Thoughts on priorities



1. Generate marketing content across the funnel

- a. Awareness: blog posts, contributed articles, op-eds, speaking proposals & presentations
- b. Consideration: nurture emails (targeted to specific industries, roles, and stage of funnel), webinars, white papers / eBooks, videos, best practices docs
- c. Purchase: case study, ROI explanation, brochure, deployment guide, sales slides
- d. Adoption: quick start guide, in depth topical how-to guides, user guide, client newsletter
- e. Sales training: objection handling, tactical pieces to respond to high priority sales situations

2. Build demand generation program

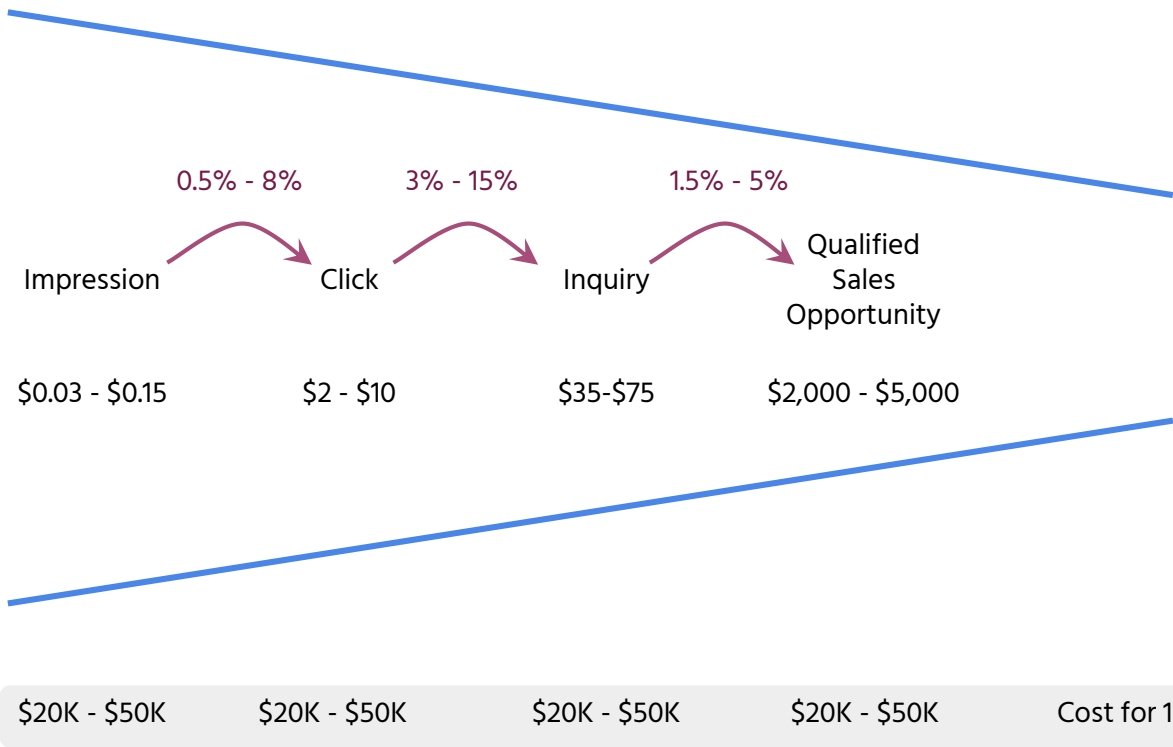
- a. Strategy: keyword research, lead capture funnels, audience sizing and targeting
- b. Tech: marketing automation, landing pages, optimization, SEO
- c. Ads: search, social, retargeting, amplification
- d. Execution: ongoing measurement, experimentation, and optimization

3. Establish thought leadership via PR and speaking



Backup Planning Materials

Marketing Funnel Math



Goal: experiment with different activities

To truly know if a specific marketing activity is working:

- Must generate ~ 10 qualified sales opportunities (assuming close rate is 25%)
- Each experiment will cost between \$20K and \$50K

Will likely need to evaluate based on quality of leads

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BUYERS JOURNEY



Metrics

<ul style="list-style-type: none"> Impressions Social media mentions Press mentions Analyst mentions Cold email opens Awareness (aided & unaided) 	<ul style="list-style-type: none"> Cold email clicks Ad clicks 	<ul style="list-style-type: none"> Website visits Visit duration Video views Content downloads 	<ul style="list-style-type: none"> Cold email responses Form submissions Inquiries 	<ul style="list-style-type: none"> Marketing Qual Lead Sales Accepted Lead Sales Qual Lead 	<ul style="list-style-type: none"> Usage (DAU, MAU)? % of hires recommended NSAT Renewal %
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Marketing Organization

signal noise

Demand (Paid)

- Events
- Paid social
- Account Based Marketing
- Lead generation
- Paid search

Brand (Owned)

- Identity
- Collateral
- Website
- Content Production
- Organic social
- Lead nurturing

Thought (Earned)

- PR
- Speaking opportunities
- Industry analysts
- Social media

Product

- Messaging & positioning
- Analyst relations
- Sales content & training
- GTM and strategy
- Adoption / engagement

Content

- Editorial calendar
- Content Creation
- Customer/Community

Sales and Marketing Operations

- Systems (CRM, Prospecting, Website, MAP, other)
- Process & Documentation
- Measurement & Reporting

Partners?