



# The Executive Guide To Strategic Marketing Plans

THE BENEFITS, CHALLENGES, AND IMPLICATIONS  
OF A MARKETING-FIRST PERSPECTIVE

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# Introduction

Fighting your way to the top of an oversaturated market takes more than dependable products and services. You need a strong strategic marketing plan to map out your path forward. While many C-level executives focus on overall business strategy, have a strong sense of their competition, and even understand their companies' position in the marketplace, it's common for them to overlook the importance of a strategic marketing plan. This is a critical oversight for the leaders who want to reach their target buyers and drive growth. Marketing plans:

## **Enable clear decision-making.**

A marketing plan is the decision-making backbone of focused marketing outreach. It prevents impulse decisions and makes objectives, budget, and timeframes concrete. Having a plan ensures that your marketing objectives align with your business goals and takes the guesswork out of the everyday operations.

## **Formalize ideas and strategic opportunities.**

A marketing plan sets parameters within which to monitor and measure your team, resources, and company performance. It provides the fundamentals to turn your creative ideas into a reality through achievable, realistic steps.

## **Establish roles and responsibilities.**

A marketing plan outlines the tactical steps required to succeed, and it provides structure for carrying out those tactics. It centers your team around a common goal and empowers them with a roadmap to achieving that goal.

We wrote this eBook to help you kickstart the process of boosting your marketing strategies to increase your bottom line. You'll learn how to gain a competitive advantage and increase revenue growth using marketing plans. You'll discover four types of marketing plans and how to customize them to your needs. And you'll get insights based on our experience of rolling out marketing plans for our clients. We thank you for your interest in the subject, and we promise you'll find this particular read worth the time.

## Contents

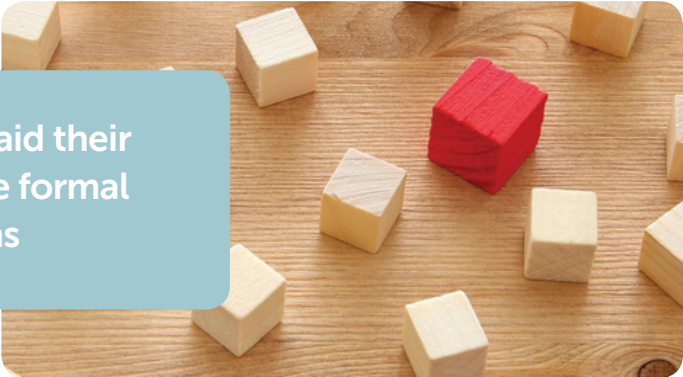
1. Why Create a Marketing Plan?
2. Four Types of Marketing Plans
3. Essential Strategic Elements
4. How to Build a Marketing Plan
5. Common Implementation Challenges



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## Section 1: Why Create a Marketing Plan?

In a recent survey, we found that **32% of respondents said their companies do not use** formal marketing plans at all. That means almost a third of companies are essentially winging their marketing efforts.



32% of respondents said their companies do not use formal marketing plans

In its State of Inbound study, HubSpot found that the top two priorities for today's marketers are converting leads into customers and generating web traffic. These goals are tied together: Web traffic can bring leads into the pipeline, and those leads can become customers. On the surface, web traffic = customers. But that's not always the case. A marketing plan should answer specific details like the type of visitors you want, and who is more likely to become a customer.

But why wouldn't a company invest time and effort into a marketing plan? It would help them better leverage resources and promote their products and services to the right audiences. And with modern marketing technology for automation and tracking, it's a better time than ever to explore and formalize strategies. But there's always a catch, especially at established companies.

**Almost 64% of respondents who don't have a marketing plan pointed to their obstacles:**

- ***"There is no marketing expertise."***
- ***"We don't have a marketing budget."***
- ***"Executives don't believe in marketing plans."***
- ***"No one will be accountable for the plan."***

These responses address a bigger problem: When leadership and culture don't support marketing efforts, the entire company suffers. Even a great B2B marketing plan or a large marketing budget will go to waste without leadership support.

Companies without a marketing plan are in a reactive position. Generally speaking, employees will look to a CMO or marketing leadership to lead the marketing charge, even if those positions don't yet exist in the organization. So they put off planning due to a lack of singular, experienced leadership. However, fast-moving environments can still create traction by building a plan based on collaboration rather than top-down assumptions. It's the decision to put a plan on paper that matters most.

## Creating a Living Document

Based on years of working on clients' formal marketing plans, we know they start with these questions:

- What are the company's strategic goals? What specific tactics should we use?
- When should this plan be rolled out? How often will we review this plan?
- What constitutes a good reason to change this plan?

After answering these questions during the build stage, you'll have the context you need to **succeed. In fact, 81% of respondents said their marketing plans were effective in driving** their desired results. When we asked them how they measured effectiveness, we received responses in two buckets:

1. Tracking Metrics. Plan evangelists establish KPIs and measure their progress.

These include quarterly reviews in their CRM and Salesforce, tracking website traffic, attributing lead generation tactics, and more.

2. Collaboration. These respondents establish ongoing conversations among the marketing and sales teams and the executive suite. Department and cultural alignment make the difference between stagnancy and measured revenue growth.

Plans that fail do so in companies on the opposite end of the tracking-and-collaboration spectrum. Without cross-departmental commitment and focus on driving specific numbers, it is almost impossible to make real progress. These trends point to leadership and culture issues. Executive commitment and a cultural focus on growth set the tone for marketing actions and cross-team collaboration.

Alignment is critical to marketing effectiveness, even after you decide to put the right plan **in place. Of the 68% of respondents who do have a formal marketing plan, a huge majority (91%) see their plan as a living document that's revisited to align with their strategic goals.**

How often your company revisits the plan is a matter of preference and change in the organization. Annual updates to the plan can support organization-wide strategic changes or refined company goals. But if your company is more fluid and has trouble sticking to the execution of a plan, you might need to revisit the plan quarterly or monthly.



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## Section 2: Four Types of Marketing Plans

Marketing effectiveness looks different at every company. A company's goals and circumstances dictate what type of marketing plan it needs to grow. B2B marketing plans differ in their complexity, focus, and their tactical approach. We believe there are four basic types of plans to choose from:



We consider strategic marketing plans the king of all marketing plans.

### 1. Strategic Marketing Plans

We consider the strategic marketing plan the king of all marketing plans. A strategic marketing plan is generally the right fit for aggressively growth-minded companies that want to differentiate themselves from the competitive field and invest in marketing technologies to build scale. Companies in this frame of mind typically use the optimal combination of in-house and outsourced marketing resources, and they pick low-hanging fruit while planting seeds in high-growth target markets.

Strategic marketing plans go from big picture goals to granular details. If you're wondering whether a strategic marketing plan is a good fit for your company, consider these details:

- Strategy: Executive team relies on outsourced marketing consultant for direction
- Execution: Senior-level (CMO) guidance or fractional CMO services
- Rationale: Used for high-growth goals

### 2. Niche Marketing Plans

Niche marketing plans are perfect for companies that have already done the strategic heavy lifting. They want to expand into existing vertical or geographic markets or build awareness in a new niche.

When evaluating outside resources to assist with planning, many B2B companies choose a strategic marketing provider based on experience in creating and executing plans in certain industry sectors. Because of the specificity required to carve out industry niches, bringing in resources with prior industry experience can abbreviate the research and recommendation process.



For niche strategies to work, companies need to be legitimate thought leaders prior to extensive proactive marketing. Therefore, the type of recommendations we'd make in this type of plan will be tied intimately to a client's true subject matter expertise.

- Strategy: Executive team specifies target markets
- Execution: Tactical marketers or fractional CMO services
- Rationale: Used during strategy shift or for aggressive market penetration goals

### **3. Product, Service, or Software Launch Plans**

Product, service, or software launch plans are needed when introducing an offering or releasing the newest version of a product. Product launches tend to be the most complex, as they require tight coordination with engineering, operations, customer support, and sales. Service launches don't have as many moving parts, but depending on the offering, they can present a messaging challenge. The goal of strategic marketers crafting this type of plan is to make new services as tangible as possible while bringing clarity to their primary benefits.

- Strategy: Product or service launch team
- Execution: Marketing executive or fractional CMO services
- Rationale: Needed at least 6 months prior to product launch

### **4. Marketing Action Plans**

For smaller companies or those with limited growth goals, marketing action plans are another short-term option. These documents consist of tactics, not strategy, and are organized as a campaign or series of campaigns. They typically use existing marketing technologies and infrastructure to pursue immediate results. While straightforward, marketing action plans can be tricky for strategic marketers, particularly if they are dealing with unrealistic executive and sales expectations.

In some instances, companies will use this type of plan to get out of the gates, while working on a strategic marketing plan behind the scenes. To be effective, this agile approach requires everyone to understand the limitations of the short-term, action-oriented approach, and to be realistic about sales returns. The action plan can then create structure about outreach and test assumptions that bleed into the strategic plan.

- Strategy: None
- Execution: Tactical marketing professional
- Rationale: Highlight an area of the company quickly

If your company wants systematic, proactive marketing that fits, then you should start with a plan. Finding the plan that matches your growth goals and financial resources can put you on a clear path to marketing-generated revenue.

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## Section 3: Essential Strategic Elements of a Marketing Plan

After you've chosen the type of plan that works best for your company, you'll need to ensure that key elements are incorporated during the build stage. Without these elements, strategic marketing consultants will be ineffective at framing the bigger picture and putting your goals into a context that promotes achievement. Here are the four strategic elements that can't be skipped in any plan:

### 1. Research

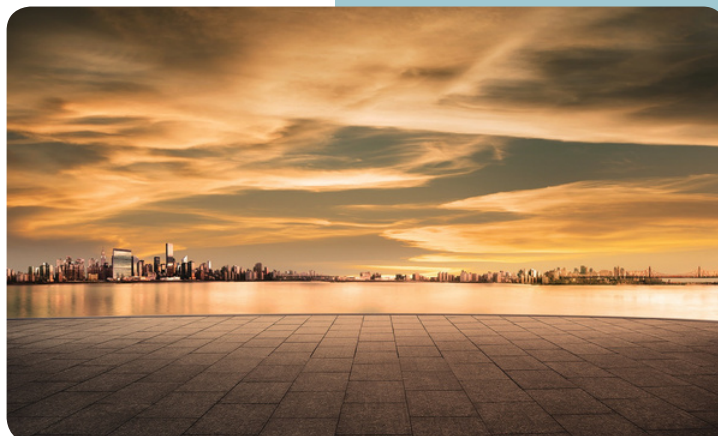
For a marketing plan to work, it must be in the context of the company's history and reality. Experienced consultants deep dive into the history of a company's business strategy. They learn what's worked, what's failed, and establish any surprises or missed opportunities. They analyze the entire marketing machine and the company it fuels. With a clear sense of the company's strengths and weaknesses, strategic marketers focus on assessing the tools and talents in play.

Good strategic marketers will also spend a considerable time researching the company's existing and target markets, competition, and customers. This research helps define and refine the marketing strategies that will work best for the company.

### 2. Vision

Every strategic marketing plan is a roadmap. It should establish where you are and provide a clear path forward. If a marketing plan has vision, the destination should cause some anxiety. It means the plan is pushing the marketing program into new territory. You're giving people a glimpse of a future that they'll be responsible for reaching—of course that's exciting!

While marketing consultants can offer some of that vision in a marketing plan, it's dependent on the company's leadership and their vision, too. With clear goals, commitment, and budget, the marketing plan can become a living, breathing roadmap to execution.



### 3. Scope

Scope is what keeps anxiety at bay both at the onset and throughout execution. It defines the work required to achieve the goal, and it maps the tactical path between you and success. It's the line you want everyone to walk.

A strong marketing plan should focus on wasting little energy, while not holding any tactic too dear. The execution of a marketing plan must be a collaborative, constructive effort to stay on course. To maintain scope, everyone must keep realistic expectations, accept responsibilities, stay on task, and communicate progress through plan rollout.

### 4. Flexibility

Success depends on the skills and talents of the marketers involved in execution, as well as the team's flexibility and focus. It's a matter of course that a marketing plan won't translate exactly to the real world. Some tactics will take more time than planned, others will go smoothly, or others might generate better returns than expected. The team must be flexible in the execution, pivot to the tactics and that offer the best returns, and lean into what pushes them toward the ultimate goal most efficiently.

So, in short, enjoy the journey and keep your eye on the purpose. Measure success and celebrate milestones along the way.

Building a foundation is the first step of any solid structure. Strategic marketing consultants take the time to do their homework, set realistic goals, and adjust as necessary along the way. But lots of companies don't take that time. One of the easiest steps you can take to set yourself apart is to opt for a strategic marketing plan that is the right fit for your mission.





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## Section 4: How to Build a Marketing Plan

With the strategic elements of your marketing plan in place, you'll be ready to dive into more tactical planning. The following are elements and steps required for a strong marketing strategy. They require more muscle and trained attention to detail. Experienced marketers are experts at seeing these items from the get-go:

**Tip: If you work for a fast-growth company in a competitive industry, you may want to tap a strategic marketing consultant to save time and minimize disruption.**

### 1. Define Markets

The first part of your marketing plan should lay out niche sectors in the following buckets, pulled from the BCG methodology:



#### Stars

These are markets where you have high market share and high growth. Stars should receive the lion's share of your marketing budget and resources.



#### Question Marks

These are fast-growing markets where your company has low current market share. Should you be investing some marketing resources in these sectors to plant seeds for future growth?



#### Cash Cows

These are markets where you have high market share but are lower growth. You want to milk these markets to fund higher growth opportunities like Stars and Question Marks.



#### Dogs

These are markets in which your company has low penetration and the sector is low growth. These should be eliminated from your strategy.

Putting your markets into a clear framework gives you visibility on where you need to focus your marketing efforts and budget. Limiting your focus also can help you refine your strategies and tactics. By forcing commitment and making your targets more specific, you'll create much more tailored strategies for audiences you need to resonate with to drive growth.

## 2. Build a Marketing Foundation

Cost-effective, results-driven marketing programs require a strong marketing foundation. If you skip this step, which many companies do, you'll be tossing money and time in the trash. Some of the pieces for building a foundation are:

### Buyer Personas & Messaging


Identify a customer you currently work with that you would replicate 100x if you could. Now profile that customer. Who is the customer's decision maker? What do they worry about? What would they say about you and the support you give them? Identify their title, role, responsibilities, challenges, preferences for product and service attributes, and communication patterns. The resulting output is what we could call a "buyer persona," a profile of the ideal customer with whom we should be communicating in our marketing outreach.

The persona should then guide your strategic marketing consultant to create messaging that's in line with the marketing strategy. If you know the target buyer, then your messaging becomes a matter of communicating the value and benefits of your specific solution. Your company's messaging must be based on a core strength and a customer purchase driver. It also must differentiate your company from its primary competitors.

### Visual Brand

Have you ever done a double-take at someone who's dressed super sharp? Clothes we choose help define our identity. That's what a visual brand does for a company, and it's why the process of developing a brand requires a thoughtful and informed approach.

As the saying goes, you want to dress for the job you want. Invest in a logo, fonts, colors, and a tagline that's as sharp as a tailored suit, but also speaks to your buyer persona. Your visual brand should signal to your ideal buyer that you're a strong candidate for their business.



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and a tagline that's as sharp as a  
tailored suit.

### Website & Analytics

A responsive, secure, customer-focused website that delivers a great user experience and is optimized for organic search is a must. Companies have called Marketri in a panic because their 90's-looking website lost them a major opportunity. Because customers do much of their research online, having an A+ website should be a top priority—no matter what.

Your website should reflect what your buyer persona wants to see in a potential service provider. It should offer a medium for your messaging and visual brand to resonate with your potential buyers. It should also be built as a powerful tool for your marketing team.

Today's technology allows marketers to measure website activity, convert visitors into contacts, and nurture those contacts into sales prospects. Looping in a strategic marketing consultant into your web development process cannot only help you create visual and messaging consistencies, but also strategic efficiencies behind the scenes. Those efficiencies can have wide-ranging impacts, including better visibility on what audiences are experiencing on your website and more targeted lead generation.

### **3. Incorporate ABM and Content Strategy**

As we noted earlier, a solid strategy usually includes selecting growing market segments in which your company has a competitive advantage. A wide range of players can exist within each target market, including SMBs, large companies, and industry giants. Depending on the service or product your company offers, you may choose to focus on one sliver of the spectrum or go for the full range.

Do you want to hunt "big whales" and maintain a bread-and-butter base of medium-sized customers? Then tiering up your marketing plan with Account-Based Marketing (ABM) is the way to go.

#### **Account-Based Marketing**

ABM is a modern marketing strategy that targets specific accounts using personalized campaigns across sales and marketing. Once you identify your top accounts, it's helpful to organize them into distinct tiers. There isn't a universal standard for organizing, but here are standards some pros use:

##### **Tier One**

These accounts are your big whales, and they require marketing and sales to take a proactive and integrated approach to outreach. Marketing plays the role of the toaster, warming up the Tier Ones with custom 1:1 communication, while sales does the heavy lifting with phone and email outreach.

##### **Tier Two**

Accounts classified as Tier Two are typically middle-market and large companies. These will match your ideal client personas. Marketing's role is to generate sales qualified leads (SQLs) through creating highly relevant industry- and sector-specific content and messages. Sales professionals can nurture leads alongside marketing and work to qualify SQLs. Generally, marketing and sales will share time equally working Tier Two accounts.

##### **Tier Three**

These accounts tend to be in the thousands and are likely to be small businesses with one-off, occasional needs. Your marketing plan should mine for low-hanging fruit with smaller accounts and use existing marketing technology and content as much as possible. Sales will play a minimal role for Tier Three accounts. New business opportunities can often be passed directly to customer service.

Marketing plans need to identify as much information as possible about a company's various accounts, so the tiers and marketing strategy evolve to stay fresh. Once you have your accounts organized, you can then focus on outreach by tier. The combinations of tactics and the roles of sales and marketing in recruiting new accounts may differ. For example, you might decide that Tier One accounts should receive direct mail pieces, paid digital advertising, and direct email contact, while your Tier Three accounts should just receive a sliver of the digital advertising spend of Tier One.

## **Content Strategy and Content Clusters**

Every strategic marketing plan should have a significant content strategy component. We find that many of our clients have been creating content—without actually generating any leads. Content for content's sake won't move the needle. The missing link to a successful outcome is often sound content strategy.

Be specific in your marketing plan about what keyword phrases are critical to your business, and then surround them with context. The context helps buyers learn early in their buying journey about the solutions landscape and the strengths of your unique offerings.

Context also helps search engines "understand" what your company does. The physical hyperlinks you use to connect content pieces and webpages create a structure that search engines can read and interpret. If you're careful in the way you create content and connect it to your company's services, you can increase the chances of attracting high-quality leads.

**Example.** One of Marketri's keywords is "strategic marketing plans," as it's one of our core offerings. To support that keyword, we have content outlined in our marketing plan that answers buyers' questions about the topic. Our future content might include:

- Downloadable Marketing Plan Template
- Top 10 Things to Include in Your Plan
- Marketing Plan Cost Guide
- Timelines for Marketing Plan Types

Marketing automation platforms like HubSpot guide users through building clusters of content that offer structure for search engines, internal stakeholders, and web visitors to understand the context they're creating with content. All with the common purpose of supporting the marketing plan through thoughtful tactics.

## **4. Offload to Marketing Technology**

Marketing programs without the right technology platforms are at a serious disadvantage for measuring and scaling. Your target markets, marketing budget, communications plan, and talent will inform what technologies your company needs. As you review different platforms, ask the following questions:

- Am I using manual processes that could be expedited by software?
- Will this technology improve target audience reach and help personalize our messaging?
- Does it assist in lead capture and qualification?
- Can I start with a basic package and grow into a premium version over time?
- What is the platform's learning curve, and do we have the talent in-house to use it?

There are tons of considerations when making a marketing plan. The key is to stay organized and focus on where you can move quickly and efficiently toward your established goals. There are key areas where marketing technology should be used, offering direct ROI and efficiency. Some areas where technology prevails are:

- **Analytics.** Google Analytics and Adobe Analytics have absolutely changed the marketing game. Google's free tool lets you track users' interaction with your website and marketing tactics.
- **Email Automation.** Email marketing and automation change the format and frequency of your communication with buyers. Tools like HubSpot, Pardot, and Marketo provide guidance and structure for your ongoing email programs.
- **Search Engine Marketing (SEM).** By helping you understand and measure how website drives and converts search traffic, SEM tools like Google Analytics, Moz, or SEMrush can help you evaluate how effectively you're incorporating content strategy into your marketing plan.
- **Remarketing.** Targeting users who have already shown interest in your company makes remarketing a highly effective tactic. Google AdWords and AdRoll are the leaders in remarketing and provide many user-friendly tools.

Each marketing tool can support and enable your marketing plan in different ways. Many are already compatible with each other, lending themselves to optimizing your business. Keep in mind that your toughest competition most likely already has most of these tools in place. So, adopting basic marketing technology is table stakes.

## 5. Don't Get Stuck

Even with a solid tech stack in your corner, you might get stuck along the way. If you hit a roadblock while creating your marketing plan or developing content, then it might be time to shift your point of view. Here are some ways to get a new look at the same old problem.

- **Fill a gap.** Don't build a strategic marketing plan to mimic what your competitors are doing. Dial in on what they're not doing. What's an angle they're not chasing? What could they do better with? This approach can help you carve a valuable niche for your business.
- **Ask a customer.** In times of high growth, companies focus on the transactional aspects of their business and neglect the personal ones. The customer experience involves a lot of intangibles, like their expectations, their impressions, their engagement, and their definition of value.
- **Use a third party.** The politics of business can make it difficult for people to open up. If your culture isn't inviting, enlist an objective third-party consultant. It helps people offer feedback they might have otherwise withheld, and it shows employees that the company cares enough to invest in help.



If you've followed through, and you've incorporated both the strategic and tactical elements we've covered, your finished marketing plan should be in strong shape. Starting with vision, defined target markets, a solid foundation, targeted marketing tactics, and dedicated technology, you can get out to market and work to build and maintain momentum. That said, when it's time for implementation, you might want to review the next section, which is based on our own experience in helping companies execute marketing plans.

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## Section 5: Common Challenges of Rolling Out a Marketing Plan

Even in a growth organization, a marketing plan is bound to hit speed bumps. While many unrealistic plans are put on a shelf or mental backburner, in most cases, there are warning signs before that happens. Here are some common challenges we see during implementation (and their much bigger implications).

### **Cultural dysfunction halts progress.**

Organizational culture plays a major role in the success of a marketing plan launch. For a plan to thrive, the marketing department needs incredible internal support. For example, engaging content stems from access to willing and open subject matter experts. Streamlined lead processes involve ongoing fine-tuning with salespeople. Progressive messaging requires a measure of trust from company leadership.

Strategic marketing plans are much more likely to gain momentum in collaborative and understanding cultures, where employees feel encouraged to work together to accomplish greater goals. If your company culture is on the protective or inflexible side, know that initial excitement about a marketing plan can easily devolve into stalled progress and frustration.



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### **No accountability means no momentum.**

For the plan to stay on track, everyone involved must embrace accountability—not just individually, but also as a team. They need to strive to hit their marks, help their teammates, and hold each other accountable. As employees assume responsibility for their actions, they build a sense of autonomy in their work. They can also take personal pride (and earn rewards) for successes.

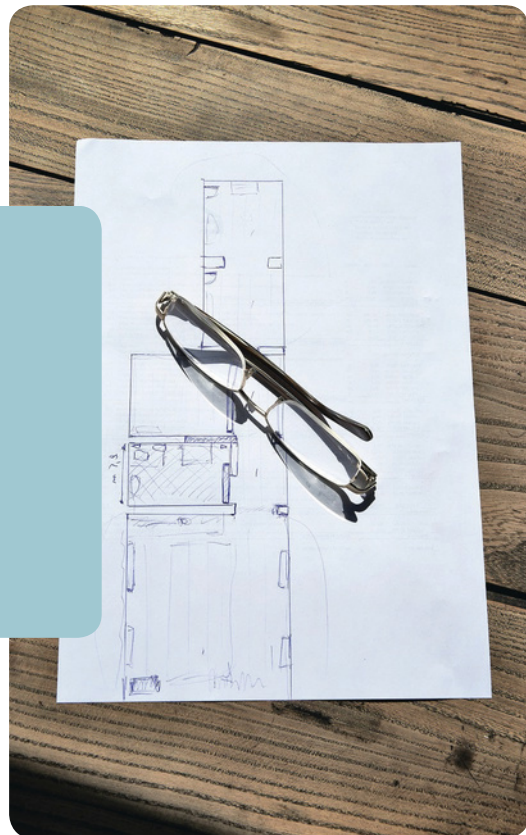
Environments and plans without built-in accountability lack the positive pressure needed to accomplish tasks. They also lack a focus on forward movement. If you find accountability is an afterthought in your organization, your marketing plan will have a hard time taking flight.

### **Fear of commitment blocks alignment.**

Working plans require organization-wide commitment to its ultimate direction. Just as a leader and a clear vision can empower an employee, a leader with a short attention span can wreak havoc on spirit and long-term success. Keep in mind that a fear of strategic commitment is different than tactical commitment. As you're enacting a plan, it's healthy to question the tactics. You should test, measure, and tweak tactics as necessary. But if you feel that your company is questioning the broader strategic direction, then that's a warning sign you need to address.

In the absence of strategic commitment, accountability, and cultural harmony, employees will focus on individual concerns. They'll tackle challenges as they come in, create their own priority systems, and unwittingly build internal silos. In this sort of enterprise, the problem isn't a matter of drafting a departmental plan, but rather aligning the entire company around a common purpose. That alignment creates a context in which every employee and department can operate effectively and enact the plan you worked so hard to build.

Just as a leader and a clear vision can empower an employee, a leader with a short attention span can wreak havoc on spirit and long-term success.



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## Conclusion

Sustainable growth is a systemic concern. When a team member understands how each task fits in the overall strategy, they'll pursue personal and organizational growth. But team members look to executive leadership to set organizational direction and the framework in which employees are expected to drive results. Leadership's commitment to a strategic marketing plan and its rollout is paramount if you want to generate revenue through the marketing function. A marketing plan is the tool, the roadmap, and the common goal your team can rally around. With a well-researched, detailed marketing plan in place, your employees are empowered to make the company's success their personal responsibility. And once execution is underway, your leadership has time to focus on the destination.

Leaders who value realistic strategy understand what a huge undertaking creating a plan can be. Marketri has it down to a science. We analyze your position in the market and focus on clearly defining where you want to be. We outline success and create a plan for execution. But we always return to the strategy and frame every tactic in its context.

Growth requires firm footing in today and a true commitment to tomorrow. If you don't know what you want to grow, then why start planting seeds?

At the onset of developing a marketing plan, we push companies to expand their understanding of the marketing function. Throughout the journey, we help them build stronger businesses. When they evolve, their marketing plans grow with them. Our goal is to guide our clients to achieving their goals by aligning their marketing efforts, investing in high-quality execution, and focusing on measurable success. If they can do that, and stay the course, success is just a matter of time.



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## About Marketri

Marketri is a modern-method B2B strategic marketing consulting and fractional CMO firm that helps clients obtain and retain customers to reach growth goals. We offer a range of services that cater to B2B middle-market and fast-growing startup businesses more effectively than traditional models.

Marketri leads clients' strategic marketing efforts through start-to-finish, integrated marketing solutions that support long-term relevance and success. We develop cost-effective, scalable marketing strategies and measurable programs that consistently drive qualified leads and lower the cost of new customer acquisition. Our model, our network, and our experience provide our clients unsurpassed value for the marketing dollar.

**Ready to take  
the next step?**

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to build your Strategic  
Marketing Plan.**

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