



Driven by Insights
Delivered from Experience

Marketing Strategy Framework

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Introduction

A marketing strategy is crucial for companies trying to effectively prioritize resources, reach their ideal audiences, and turn potential customers into buyers. If corporate and marketing strategies don't align, or if they fail to generate product demand, company growth will stall. A well-crafted strategy should consist of planning, execution, and support tenets. Once fleshed out, this strategy will guide your marketing team to effectively message to and convince customers to buy your products.

This marketing strategy framework is broken out into subtopics that delve more deeply into specific motions. Within these subtopics, you'll find descriptions and benefits along with suggested deliverables and thought starters that will help your marketing team discover potential knowledge gaps in their current approach.

Marketing Strategy Framework



A company’s marketing strategy must build on insights gained from the external marketplace, remain aligned to corporate strategy, and address how the marketing department will build demand for the company’s products. It requires choices on which market channels to invest in and which ones to forgo. One of the main goals of the marketing strategy is to set the sales strategy up for success.



What is a marketing strategy?

A marketing strategy is an operating plan for a company’s marketing department.



What does a marketing strategy do?

A marketing strategy allocates resources efficiently to drive revenues.



What does it mean to use a marketing strategy?

Using a marketing strategy means the marketing department builds buyer preference for the company’s products.

Marketing Planning



B2B Branding

Brief Description

Create an inspiring brand that influences your customers and prospects to go from the problematic status quo to the opportunity-filled future. This is accomplished by solving their biggest problem with the solution they purchased from you.

Benefit

B2B branding is rapidly changing as organizations seek to create points of differentiation among their competitors. An effective B2B branding strategy will leverage data to cut through the noise in the marketplace, separate yourself from your competition, and engage your audience on a deeper level.

Deliverables

- Competitor brand positioning analysis
- Brand activation audit
- Brand equity valuation estimate
- Touchpoint analysis
- Message architecture
- Win strategies (by product or competitor)
- Business case by solution

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have completed a brand audit in the last 1-2 years and actively use it to shape your brand strategy.
2. You can describe a 360-degree picture of the world your brand lives and acts within.
3. You have documented and educated your organization on your brand promise.
4. You have a documented brand promise guarantee.
5. Your sales force is living the brand in every interaction with customers, prospects, and partners.
6. You understand the status quo your customers and prospects find themselves in when not using your products.
7. You can define how your solution will solve the problems of your customers and prospects.
8. Your brand inspires your customers to go from the problematic status quo to the opportunity-filled future you have created.
9. You can quantify the cost of “doing nothing” for your customers if they decide to not fix the problem.
10. You know the process your customers follow when interacting with your brand, including the moments of truth that are most important to them.

On a scale from 1-5, how important is B2B branding to your business?



Digital Planning

Brief Description

Leverage digital channels to reach customers and promote your brand.

Benefit

Digital marketing can enhance your reach to a larger more targeted audience, which leads to increased brand awareness, lead generation, and lead conversion. The best digital strategies are developed with inputs from brand research and a deep understanding of buyer expectations. Integration across all channels is critical and will improve data collection and campaign conversion metrics.

Deliverables

- Digital marketing assessment
- Digital marketing strategy
- Digital marketing roadmap

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have a strategic plan for messaging and communicating with your prospects and customers across digital channels and devices.
2. Your content is contextualized for each channel and buyer.
3. Your digital performance needs dictate your digital budget.
4. Your channels and segments are clearly defined based on customer behaviors and expectations.
5. You can identify and track your customer's digital touchpoints.
6. You have an integrated digital marketing technology architecture.
7. You have sufficient resources to develop, launch, and analyze your marketing campaigns.
8. Your digital insights and analytics strategy is supported by the executive team.
9. You leverage real-time analytics to proactively adjust campaign performance.
10. You have integrated your digital marketing initiatives with complimentary marketing and sales strategies.

On a scale from 1-5, how important is digital planning to your business?



Campaign Planning

Brief Description

Capture the attention of customers and prospects through well-planning marketing campaigns.

Benefit

In order to generate a return on marketing campaign dollars, you require a clear objective, timeline, budget, accurate lists, correct media mix, and compelling calls to action. By leveraging customer journey insights to create compelling messaging, marketers can reach the customer through the right channels with the right content at the right time. By tying marketing campaigns to revenue-related metrics, you'll see an improvement to the return on marketing investment (ROMI).

Deliverables

- Campaign execution assessment
- Campaign planning process playbook
- Campaign schedule
- Campaign reporting dashboards

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have your campaign resources (i.e., people, money, and time) that are allocated against the "sweet spot" in the addressable market(s).
2. You execute more marketing activities than your competitors do in your target markets.
3. You have many (10+) competitors when trying to capture the attention of customers and prospects.
4. Based on research, you have focused on a few channels (e.g., telephone, email, social) that best reach your buyers.
5. Based on research, you have selected a mix of activities and sequenced them (e.g., direct mail, email, webinar, blog) with positive, measurable results.
6. Based on research, you have accurately identified and prioritized all customer touchpoints (or buyer's journey).
7. You A/B test your campaigns on a regular basis and make data-driven decisions based on these test results.
8. Based on research, you understand the proper media mix for each campaign.
9. You have created a catalog of campaign assets, and you have mapped every asset to the appropriate phase of the buyer's journey.
10. You collect campaign performance data on a regular basis and communicate insights from that data to the leadership team through reporting and dashboards.

On a scale from 1-5, how important is campaign planning to your business?



Content Planning

Brief Description

Earn brand preference by satisfying the information needs of your target customers and prospects with relevant content.

Benefit

Content marketing generates revenue when you know exactly what information your customers need, where they need it, how often they need it, and in what form they need to consume it. The right content marketing strategy will support your campaigns and enable your sales team to be more effective.

Deliverables

- Content audit
- Trigger event analysis
- Editorial calendar
- Production schedule
- Content distribution plan

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. Using a research-based approach, you have segmented and prioritized your customers and prospects (i.e., buyers).
2. You understand and have prioritized the information needs of your buyers. (i.e., the specific type of content and when and how they want to receive it).
3. You have a comprehensive understanding how your buyers fulfill their information needs.
4. You have audited your content in the last 12 months and have identified the gaps you need to fill in order to best serve your buyers.
5. You maintain a content roadmap that is aligned to your campaign execution plan.
6. Based on research, you have accurately identified and prioritized all customer touchpoints (i.e., the buyer's journey).
7. You have created a catalog of content, and you have mapped every asset to the appropriate phase of the buyer's journey.
8. You customize your content based on the buyer and the distribution channel.
9. You have a method for the real-time measurement of the performance of your content.
10. Your content is actively used in the field, which leads to the desired revenue outcomes of the company.

On a scale from 1-5, how important is content planning to your business?



Budget Planning

Brief Description

Allocate your marketing budget to the accounts with the most revenue potential and the highest propensity to spend.

Benefit

Underfunding marketing will constrain revenue growth but overfunding it will cause profits to suffer. If you spread the marketing budget across all segments, accounts, and buyers, you will run out of money and not be able to show any results. Revenue growth is maximized with an objective-based budget and the precise allocation of all marketing dollars. This enables your company to focus on strategies and activities that will maximize your ROMI.

Deliverables

- Budget method identification
- ROMI analysis
- Programs and resource sizing
- Budget audit

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. Your marketing budget is focused on the accounts with the most potential.
2. Your marketing budget is sufficient enough to enable your company to reach your addressable market.
3. Your marketing budget is allocated against the “sweet spot” of your target market.
4. Your marketing budget is sufficient enough to enable your company to achieve its revenue growth objective.
5. The marketing team utilizes an objectives-based budgeting method to assure you are focused on the most effective tactics.
6. You actively measure the return generated from your marketing budget investments and adjust accordingly.
7. Your budget is spread evenly across markets, with growth markets receiving more funding.
8. You manage your marketing spend to the appropriate level required to outperform your competitors.
9. You have control over your marketing budget, and the company prioritizes your marketing needs appropriately.
10. Your budget is aligned with the strategic objectives of your go-to-market engine (i.e., marketing, sales, and customer success).

On a scale from 1-5, how important is budget planning to your business?

Marketing Execution



Account-Based Marketing

Brief Description

Focus marketing resources on the most important accounts.

Benefit

Mass marketing tactics do not work for companies that need to focus on a small number of high-value accounts. Casting a wide net and simply hoping will not attract these valuable accounts. For companies that live and die by the big deal, a focused marketing approach is critical. Only highly targeted, customized content will provide the insights to compel accounts like these to buy your solutions. As a result, these accounts are easier to obtain, retain, and grow.

Deliverables

- Account-based marketing (ABM) strategy
- ABM process and infrastructure
- ABM roles and responsibilities
- ABM marketing operations systems
- Sales operations systems

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have segmented your accounts (customers and prospects) into rankings, from best to worst, on revenue potential and propensity to buy.
2. You have complete contact records for the buyers and influencers of each prioritized account.
3. You develop rich insights that are specific to each of your prioritized accounts to enable your marketing and sales teams to be highly relevant and personalized.
4. You convert your insights into content and messaging and personalize them for each buyer and influencer.
5. Your A-player, higher-cost resources are aligned with your highest value accounts.
6. You will make, or miss, your revenue goal based on a few big deals throughout the year.
7. You deploy a land-and-expand sales strategy inside your most important accounts.
8. Your current demand generation efforts consistently generate significant revenue that can be directly attributed to these programs.
9. The customer lifetime value (CLTV) of your key, strategic, and named accounts is at least twice that of a typical account.
10. You deploy an omnichannel marketing approach with your prioritized accounts that require remarkable customer experience (CX).

On a scale from 1-5, how important is account-based marketing to your business?



Lead Generation

Brief Description

Generate enough leads for the sales team to exceed their revenue objectives.

Benefit

Many companies generate most of their revenue from a lot of small accounts. Companies like this need a large and steady volume of leads to maintain this revenue. Marketing needs to capture and qualify these leads before sending to them to sales teams. Doing so effectively translates to high volumes of qualified leads, which then means more sales opportunities and revenue growth.

Deliverables

- Lead management process
- Lead response workflows
- Nurture pathways
- Lead nurturing assessment
- Attribution analysis

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You know how many leads need to be generated to meet the organization's revenue objective.
2. You know how many of your leads need to come from marketing and how many need to come from sales.
3. You have a documented definition (budget, authority, need, and timing) of a qualified lead.
4. Sales and marketing teams both agree on your definition of a qualified lead.
5. The marketing team is viewed as a revenue-generating partner to sales.
6. Marketing and sales teams have defined the "lead funnel" to have a top, middle, and bottom with unique nurturing strategies for each part.
7. You understand and can identify the trigger events that put your buyers in the market to purchase your solution.
8. You effectively capture and keep the attention of your customers and prospects.
9. You know what percentage of your leads need to be sourced from inbound vs. outbound marketing efforts.
10. You can calculate the ROMI for each element of your lead generation plan.

On a scale from 1-5, how important is lead generation to your business?



Customer Marketing

Brief Description

Grow revenues from existing customers.

Benefit

If your business depends on increasing the revenue generated from current customers, you must work to educate these customers in everything you can do for them. This is true because the customer lifecycle does not stop once a prospect becomes a customer. Effective customer marketing translates to increased customer retention and CLTV.

Deliverables

- Customer/prospect revenue share analysis
- Customer KPI analysis
- Customer revenue growth strategy
- CLTV and customer acquisition cost (CAC)
- Customer marketing plan
- KPI definitions and success metrics

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You depend heavily on revenue from current customers to hit your revenue objective.
2. Your customers are aware of both what you are doing for them and your entire product suite. They are unsurprised by your ability to do things for them, never saying, "I did not know you did that."
3. You know the win rate, sales cycle length, and average deal size for current customers.
4. Your revenue growth within current customers comes from several of the following: price increases, cross-sell/upsell opportunities, and product renewals.
5. Your sales team is organized in a hunter-farmer model whereby there are dedicated sales resources focused on farming opportunities with current customers.
6. Your sales team is focused on building strong relationships within current accounts to expand into new organizations.
7. Your current demand generation program is customer-centric.
8. You have defined and measured the KPIs of a healthy customer.
9. You know the CLTV and CAC of each of your current customers.

On a scale from 1-5, how important is customer marketing to your business?



Partner Marketing

Brief Description

Increase your mindshare and wallet share with each of your channel partners.

Benefit

A sound channel sales strategy requires each partner to meet their revenue targets. To be effective, your company must focus on the partners that consistently over-perform, as they are likely in high demand to represent other solutions. Marketing must maintain and improve these partner relationships. When done properly, organizations are able to retain their high-performing partners and increase revenue.

Deliverables

- Channel assessment
- Channel marketing budget
- Channel marketing plan
- Partner relationship management tool
- Channel marketing programs
- Ideal partner profile
- Channel segmentation

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You are actively working with the best partners that deliver on the needs of your company.
2. You know what percentage of your revenue comes from your channel partners.
3. You actively market to your channel partners.
4. Your partner marketing budget is aligned with partner-driven revenue expectations.
5. You have defined the characteristics of your ideal partner profile.
6. You know how each partner scores relative to your ideal partner profile.
7. You have determined the revenue potential for each partner.
8. Eighty percent of your revenue comes from twenty percent of your partners.
9. Your most productive partner marketing efforts target the partners with the most potential.
10. Your high-potential partners understand your full product portfolio and associated value propositions.

On a scale from 1-5, how important is partner marketing to your business?



Advocate Marketing

Brief Description

Listen to and harness positive feedback from your current customers to promote success stories to your prospects.

Benefit

Your buyers scour their social networks and lists of known industry experts to educate themselves early in the buying cycle. As a result, they are connecting with sales teams much later in the decision-making process. Because peer influence is so powerful, your company needs to identify and utilize your brand champions. Advocate marketing formalizes an approach to highlight the customer success stories. Ultimately, this enables you to build a network of advocates that moves far beyond traditional reference programs.

Deliverables

- Reference programs
- Referral programs
- Online communities
- Rewards/loyalty programs

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You know what information your buyers want from you at each phase of their decision-making process.
2. You know the programs you need to implement to generate referrals (e.g., social selling, referrals, offline prospecting, etc.)
3. You have a definition of what a true customer advocate is.
4. You have identified and contacted the customers that speak highly of your products, and they are willing to advocate for your brand.
5. You currently have a program in place that gives incentives to customers to become advocates.
6. You currently have a customer referral incentive program and reinforce its utilization.
7. Your prospects value insights from their peers and respond positively to warm referrals.
8. You actively monitor social media and other venues for comments and discussions about your company.
9. You have a method to measure social reach and have made it a regular part of your research cadence.
10. You have selected advocates to become part of a group of advisors to help market and sell your solutions more effectively.

On a scale from 1-5, how important is advocate marketing to your business?

Marketing Support



Marketing Roles And Responsibilities

Brief Description

Determine the right roles, number of headcount, and organizational chart required to run a best-in-class marketing team.

Benefit

Outstanding and highly specialized marketing talent is needed to execute a best-in-class strategy. A-player marketers become deeply engaged with your brand and become revenue generators instead of cost centers. When the right talent is matched with the right role productivity increases and revenue growth accelerates.

Deliverables

- Assessment of existing marketing talent
- Marketing organizational chart
- Roles and responsibilities
- Buy versus build versus outsource assessment
- Headcount plan
- Compensation benchmarks and plans for each role

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have A-player role descriptions for each position on the marketing organizational chart.
2. You know the percent distribution of A, B, and C players on the marketing team.
3. You assess the talent on your marketing team more than once per year.
4. The assessment process extends into the hiring process, so you only bring A-player talent into the organization.
5. All of your A-players are reaching their full potential and have access to optimal performance conditions.
6. Newly onboarded marketing employees become fully productive within three months.
7. Your hiring profiles are designed based on research and address the current needs of your markets, accounts, and buyers.
8. Your role profiles are built upon the modern skills required to accomplish current and future marketing objectives.
9. You have defined evaluation criteria to assess the performance of the current marketing team.
10. Your compensation plans are competitive and are designed to retain your top marketing talent.

On a scale from 1-5, how important are marketing roles and responsibilities to your business?



Product Marketing

Brief Description

Translate product features into value messaging that resonates with buyers.

Benefit

Product features and technical functionality are critical aspects to consider when designing products. However, these do not always primarily motivate buyers to purchase products. Buyers want to understand the unique value a product will provide, and what the ROI will be. Great product marketing translates features and functionality into value propositions and competitive advantages that resonate with buyers. This value messaging is leveraged in marketing campaigns and sales enablement tools and translates to successful launches and revenue growth.

Deliverables

- Product messaging audit
- Product messaging plan
- Competitive product positioning analysis
- Product positioning statements
- Product value propositions
- Product marketing content
- Customer testimonial template

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. Your product marketing team understands the business outcomes they need to deliver.
2. Your product marketing team has a defined strategic focus that is aligned with marketing and sales.
3. Your product marketing team has its own objectives-based budget.
4. You developed a revenue plan for every product in your portfolio.
5. Product marketing has identified all competitors of each product in your portfolio.
6. By product, you have calculated the pipeline attribution.
7. You have a product marketing team that develops messaging, value propositions, and competitive positioning statements.
8. The product marketing plan impacts and integrates with the sales operating plan (i.e., quotas, account resourcing, territories, compensation, etc.).
9. Your product marketing team actively produces and/or contributes to product-specific collateral, content marketing, web content, media outreach, and PR.
10. Your product marketing team develops messaging based on the needs of your buyer personas.

On a scale from 1-5, how important is product marketing to your business?



Field Marketing

Brief Description

Integrate corporate marketing with sales by executing marketing tactics in the field.

Benefit

Corporate programs without localization fail to produce revenue. Each region is different, and each message and program needs to be adjusted to meet the needs of the different customer types. Field marketing is the connective tissue. Marketing budgets are best utilized when the field positively influences the corporate marketing strategy.

Deliverables

- Field marketing plan (includes roles and objectives)
- Localized campaign execution plan
- Geo/industry-specific content plan
- Local/regional event and conference plan
- Local/regional association plan
- Local sales enablement plan
- Field marketing scorecard

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. Field marketing has a set of revenue-based outcomes they must achieve on a quarterly basis.
2. Field marketing activities are based on the expected ROMI.
3. Your field marketing team has a defined strategic focus that is aligned with marketing and sales.
4. Your field marketing team has its own objectives-based budget.
5. Field marketing plays an active strategic role between corporate, sales, and marketing departments.
6. Field marketing engages in a two-way dialogue with prospects when executing its tactics.
7. Marketing tailors its messaging on the field level, depending upon location and event.
8. Your field marketing team provides the feedback it's collected to the corporate marketing team.
9. Sales utilizes field marketing on a regular basis and is satisfied with the support provided.
10. Underperforming field marketing activities are immediately cut from the budget.

On a scale from 1-5, how important is field marketing to your business?



Marketing Data

Brief Description

Analyze data collected through customer interactions to provide predictive guidance for future direction.

Benefit

Data can reveal the strengths and weaknesses of every part of your business. With the right analysis, accurate data enables marketing leaders to make the right strategic choices. Because buyers spend a majority of their decision-making process using digital platforms, user behavior is trackable. Managing your marketing data leads to greater insights. These insights can produce more effective budget allocations.

Deliverables

- Data audit
- Data strategy
- KPI and metric identification
- Reporting and dashboard requirements and design

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have defined KPIs.
2. You have a clearly defined data strategy.
3. You use data to influence change and make decisions.
4. You store your data in a centralized, secure database.
5. You follow a tagging methodology for accounts, leads, and contacts.
6. You do not rely on individual laptops and MS Excel to analyze and store your data.
7. You use advanced analytics tools to track your users' activity (e.g., Hubspot, Marketo, etc.)
8. You use advanced analytics tools to analyze your data (e.g., Tableau, Anaplan, etc.)
9. You digitally track touchpoints and content consumption at the individual level.
10. You use dashboards and reports to make marketing decisions.

On a scale from 1-5, how important is marketing data to your business?



Marketing Tech Stack

Brief Description

Build a scalable technology ecosystem to support the digital and decision-making needs of the marketing team.

Benefit

Software innovation and platform proliferation has changed marketing forever. Cloud-based offerings are easy for marketing teams to buy and use. These tools need to be integrated and the integrity of the data collected needs to be maintained. When done well, the investments lead to data-driven decisions. It provides the team with real-time information, so they can adjust course as needed to meet the changing needs of the buyer.

Deliverables

- Buy versus build versus outsource assessment
- Technology roadmap and system map
- Marketing automation plan
- Website optimization plan
- Web analytics
- Marketing analytics

Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your marketing strategy transformation.

1. You have documented and maintained a marketing technology strategy.
2. Marketing collaborates with the chief information officer (CIO) to design the marketing technology strategy.
3. You have documented an integrated marketing technology roadmap.
4. When selecting technology partners, you use a comprehensive scorecard to assess the features and benefits.
5. Your technology is clustered by marketing function (i.e., lead management, content, etc.).
6. You have organized your technology by sequence inside the buyer's journey (i.e., awareness, lead nurture, sales conversion).
7. Your marketing technologies are integrated with other critical systems outside of marketing.
8. You have manual processes in place to bridge capabilities.
9. You invest and upgrade marketing technologies each year to more advanced systems.
10. You use a data cleanliness plan to maintain accurate and up-to-date data.

On a scale from 1-5, how important is the marketing tech stack to your business?