

This slide can be used OR may be replaced with organization-specific title slide.

# Marketing Strategy

**Company Name**







Presenter NAME — Presenter TITLE

DATE

# Agenda for Marketing Strategy Presentation

- 1) **Framing** — Brief background on the development of marketing strategy
- 2) **Executive Summary** — High-level overview of priorities and marketing strategies
- 3) **Performance Review** — Summary review of previous year marketing performance
- 4) **Business and Market Context** — Review of trends and elements informing strategy
- 5) **Principles and Constraints** — Decision drivers and limitations
- 6) **Business Priority Stories** — Overview of how marketing will support business priority
- 7) **Capability Maturity** — Assessment of marketing capabilities
- 8) **Budget** — Snapshot of the proposed budget
- 9) **Measurement** — Overview of proposed KPIs and measurement strategy
- 10) **Risks / Stops / Asks**
- 11) **Next Steps**

# Framing

	<b>Process</b>	<ul style="list-style-type: none"><li>• Process bullet...</li><li>• Process bullet...</li><li>• Process bullet...</li></ul>
	<b>Collaborators</b>	<ul style="list-style-type: none"><li>• Collaborators bullet...</li><li>• Collaborators bullet...</li><li>• Collaborators bullet...</li></ul>
	<b>Sources of input / analysis</b>	<ul style="list-style-type: none"><li>• Sources bullet...</li><li>• Sources bullet...</li><li>• Sources bullet...</li></ul>
	<b>Strategic scope</b>	<ul style="list-style-type: none"><li>• Strategic scope bullet...</li><li>• Strategic scope bullet...</li><li>• Strategic scope bullet...</li></ul>
	<b>Tenor of plan</b>	<ul style="list-style-type: none"><li>• Tenor of plan bullet...</li><li>• Tenor of plan bullet...</li><li>• Tenor of plan bullet...</li></ul>
	<b>Alignment to business priorities</b>	<ul style="list-style-type: none"><li>• Alignment bullet...</li><li>• Alignment bullet...</li><li>• Alignment bullet...</li></ul>

# Executive Summary

Summary paragraph — Insert approximately 35-word summary of the themes and critical narratives included in the marketing strategy.

Business Priority	Marketing Problem to be Solved	Core Marketing Initiatives	Budget
<p><b>Priority — 5-8-word statement for each business priority</b></p>	<ul style="list-style-type: none"> <li>• 5- to 10-word bullet on priority-related marketing problems to be solved.</li> <li>• No more than 2-3 bullets per priority</li> </ul>	<ul style="list-style-type: none"> <li>• <b>15- to 20-word bullet</b> — Feature description of highest profile initiatives related to each business priority.</li> <li>• <b>Maximum</b> — 2-3 bullets per priority</li> </ul>	<p>2022 Budget = \$XXXMM                  2023 Budget = \$XXXMM</p> <p><b>+\$XXXMM</b></p> <p>Budget Drivers:</p> <ul style="list-style-type: none"> <li>• <b>Bullet</b> — 10- to 12-word description of each budget driver.</li> <li>• <b>Bullet</b> — 10- to 12-word description of each budget driver.</li> <li>• <b>Bullet</b> — 10- to 12-word description of each budget driver.</li> <li>• <b>Bullet</b> — 10- to 12-word description of each budget driver.</li> </ul>
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# Previous Year Performance and Insights

Summary paragraph — Insert approximately 35-word summary of the previous year’s performance and related insights. Capture the highest-level themes, results, and insights.

<i>Business Priority</i>	<i>Outcomes</i>	<i>Insights/Learning</i>
<b>Previous year business priority</b>	<ul style="list-style-type: none"> <li>• 10- to 15-word bullet on priority-related outcomes from the previous year</li> <li>• Maximum 2-3 bullets per priority</li> </ul>	<ul style="list-style-type: none"> <li>• 10- to 15-word bullet on key insights related to the business priority from the previous year</li> <li>• Maximum of 2 bullets per priority</li> </ul>
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<i>Other Insights</i>
<ul style="list-style-type: none"> <li>• <b>Bullet</b> — Include descriptions of additional insights from the previous year related to stated business priorities or other areas that may inform the subsequent proposed marketing strategy.</li> <li>• <b>Bullet</b> — Include descriptions of additional insights from the previous year related to stated business priorities or other areas that may inform the subsequent proposed marketing strategy.</li> <li>• <b>Bullet</b> — Include descriptions of additional insights from the previous year related to stated business priorities or other areas that may inform the subsequent proposed marketing strategy.</li> <li>• <b>Bullet</b> — Include descriptions of additional insights from the previous year related to stated business priorities or other areas that may inform the subsequent proposed marketing strategy.</li> </ul>

# Business and Market Context

 <b>Social / Cultural</b> Attitudes, behaviors, and lifestyles of individuals and groups in a society	 <b>Technological</b> Evolution, impact, and disruption of technology change	 <b>Economic</b> Factors in the economic environment that influence businesses and governments	 <b>Regulatory / Legal</b> Changes in laws and governmental policies and regulations to reward or punish particular behavior
<ul style="list-style-type: none"> <li>• <b>Social / Cultural trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Social / Cultural Trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Social / Cultural Trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Social / Cultural Trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Technology trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Technology trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Economic trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Economic trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Economic trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Economic trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>
	 <b>Political</b> Political attitudes, institutions, and legislation shifting the political environment	 <b>Trust / Ethics</b> Ethical expectations, behaviors, duties, and biases of people and companies toward one another and society	 <b>Environmental</b> Technical, political, economic, cultural, ethical and legal changes supporting environmental protection and sustainability
	<ul style="list-style-type: none"> <li>• <b>Political trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Political trend</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Trust/ethics trends</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Trust/ethics trends</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Environmental trends</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> <li>• <b>Environmental trends</b> — Insert key trends here, prioritizing trends that inform or align with proposed marketing strategies</li> </ul>

# Competitive Context

Significant Competitors		Competitive Summary / Highlights	Risk Level
<b>Competitor Name</b>	Competitor Logo (optional)	<ul style="list-style-type: none"> <li>• <b>15- to 25-word bullet</b> — featuring notable highlight or detail about the named competitor</li> <li>• <b>Maximum</b> — 2-4 bullets per competitor</li> <li>• <b>Only highlights</b> — Competitive context here should be simply highlights of other more detailed competitive analyses not featured within the strategy document</li> </ul>	Indicate estimated risk level this competitor represents <b>(low/moderate/high)</b>
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# Strategic Principles and Constraints



## Decision — Prioritization Principles

Drivers of Key Decisions and Prioritization

<b>Principle</b>	25- to 35-word description of the principle, providing context on how it may inform the subsequent strategies and related critical decisions.
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## Constraints

Factors that may limit or impede the pursuit of strategy

<b>Name of constraint</b> — 25- to 35-word description of the constraint. See the sample document for examples.
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# Priority Story

Summary paragraph — Insert approximately 50-word summary of the business priority, ideally touching briefly on each of the related core marketing initiatives and connecting clearly to the priority in the executive summary. (See sample strategy document for examples.)

<i>Business Priority</i>	<i>Core Marketing Initiatives</i>	<i>Key Supporting Programs</i>	<i>Targets/Objectives/Measurement</i>
<p><b>Statement of business priority — Maximum 5-10 words</b></p>	<p><b>Initiative name</b> — 15- to 25-word overview of the core marketing initiative</p>	<ul style="list-style-type: none"> <li>• <b>Supporting program</b> — 25- to 30-word description of each of the key supporting programs.</li> <li>• <b>Limited number</b> — Feature 2-4 highest priority programs related to each core marketing initiative.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Measure</b> — Description of target metric or achievement.</li> <li>• <b>Measure</b> — Description of target metric or achievement.</li> <li>• <b>Measure</b> — Description of target metric or achievement.</li> </ul>
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# Capabilities/Maturity Assessment

Introduction

Executive Summary

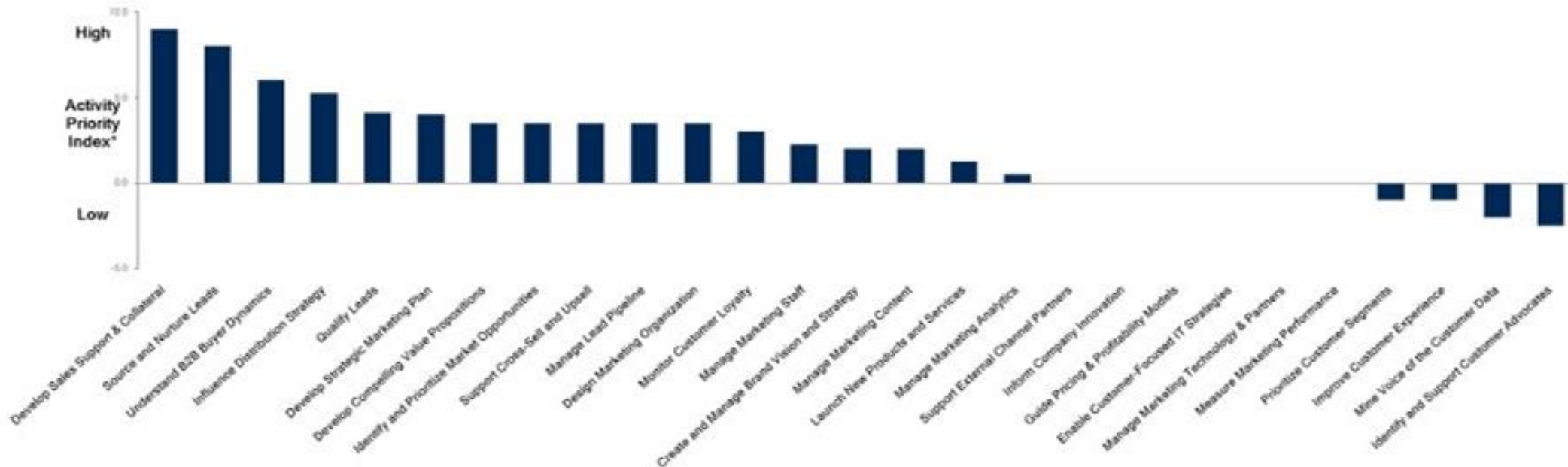
Path to Maturity

Next Steps

Appendix

## What are the High Priority Areas for Your Function?

The Activity Priority Index identifies where the function is less mature in activities of greater importance.



### Highest Priority

- Develop Sales Support & Collateral
- Source and Nurture Leads
- Understand B2B Buyer Dynamics

### Lowest Priority

- Identify and Support Customer Advocates
- Mine Voice of the Customer Data
- Improve Customer Experience and more activities

n = 2

\* Activity Priority Index: Activity Priority Index (API) for an activity is computed as average importance minus maturity multiplied by its average importance. A higher Activity Priority Index score indicates a greater priority to the organization.

# Budget Snapshot

## Budget Overview

Previous Year Budget = \$XXXMM  
**Proposed Budget = \$XXXMM**

YoY variance = \$XXXMM

Budget Drivers:

- **Driver** — 5- to 10-word description for each of the drivers. No more than 3 to 4 drivers are to be included.
- **Driver** — 5- to 10-word description for each of the drivers. No more than 3 to 4 drivers are to be included.
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## Headcount

2022 Staff = XXX  
**2023 Proposed = XXX**

**XXX YoY role variance**

Key Hires:

- **Role/Title** — 10- to 20-word callout on the significance of the proposed role.
- **Role/Title** — 10- to 20-word callout on the significance of the proposed role.
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## Martech

2022 Budget = \$XXMM  
**2023 Budget = \$XXMM**

**\$XXMM YoY variance**

Budget Drivers:

- **Budget driver** — 10- to 20-word description of each element contributing to budget shifts.
- **Budget driver** — 10- to 20-word description of each element contributing to budget shifts.
- **Budget driver** — 10- to 20-word description of each element contributing to budget shifts.

## Other Budget Callouts

- **Budget callout** — 10- to 15-word description of other notable budget-related items worthy of executive attention.
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Category	Q1	Q2	Q3	Q4	TOTAL	Previous Yr.	YoY Variance
Agencies and Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Paid Media	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Labor	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Marketing Technology	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

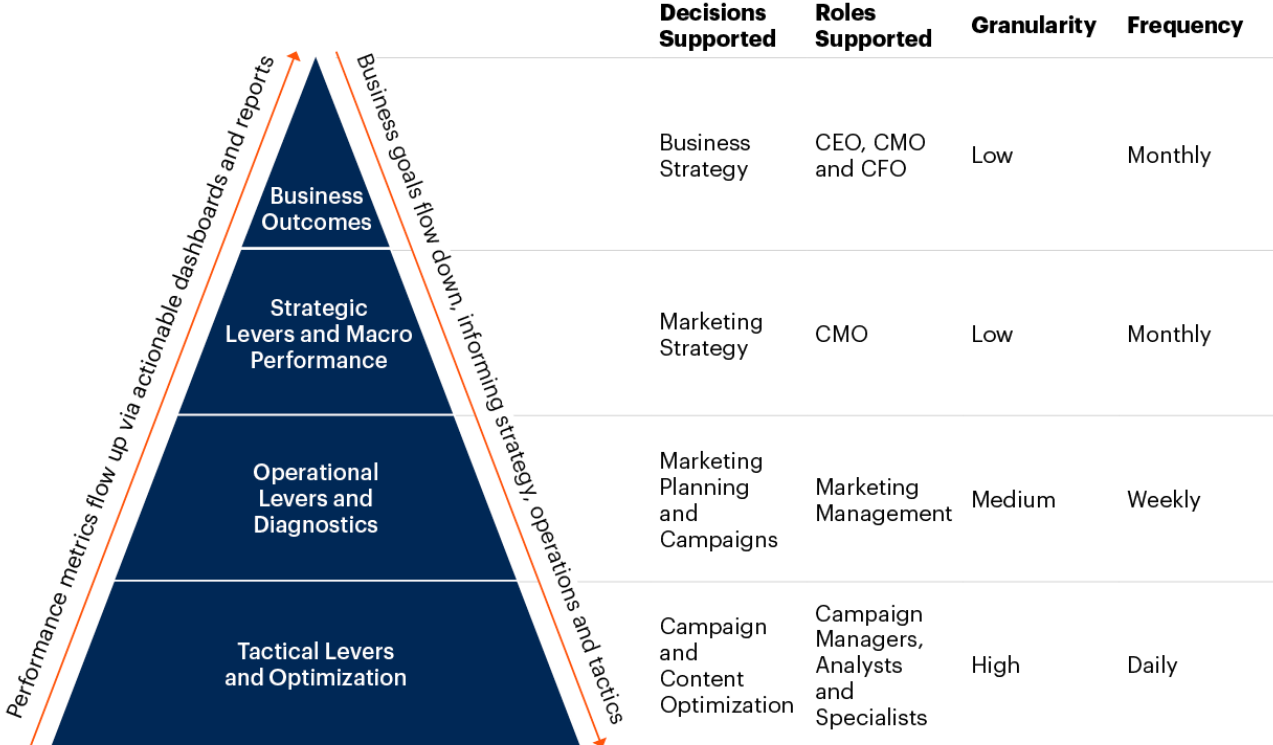
Marketing as % of Total Company Revenue	<b>0%</b>
Gartner Benchmark <small>(From Gartner State of Marketing Budgets)</small>	<b>9.5%</b>
Variance	<b>0%</b>

# Measurement Overview

## Measurement Highlights

- **Measurement highlight** — 15- to 20-word bullet featuring details related to marketing measurement. These are NOT the measures or metrics themselves, but details about measurement methods, tools, and programs.
- **Measurement highlight** — 15- to 20-word bullet featuring details related to marketing measurement.
- **Measurement highlight** — 15- to 20-word bullet featuring details related to marketing measurement.

### Gartner's Hierarchy of Marketing Metrics



**Business and Strategy Impact**  
(Stewardship of marketing resources)

**Operation and Optimization**  
(Agility, testing, continuous improvement)



# Next Steps

- Bullet – Required next step for moving marketing strategy forward
- Bullet – Required next step for moving marketing strategy forward
- Bullet – Required next step for moving marketing strategy forward
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# **Recommended Appendix Items (optional)**

- Detailed competitive analysis
- Detailed previous year's budgets
- Additional market analysis/trend information
- Relevant product strategy documents
- Existing brand health assessments or tracking
- Existing performance marketing reports or dashboards
- Current/proposed marketing organization charts