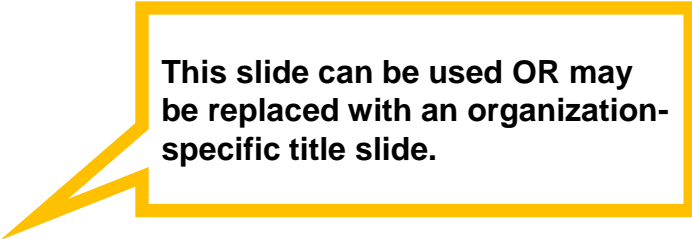


TEMPLATE Instructions - Marketing Strategy Pitch Deck

This document provides instructions for completing the Marketing Strategy Pitch Deck Template. To complete your own Marketing Strategy Pitch Deck, use the blank template included as a separate document within the Marketing Strategy Pitch Deck Toolkit.

- **Please review the Marketing Strategy Pitch Deck Overview and Sample document and these instructions before completing the Marketing Strategy Pitch Deck template.**
- Multiple inputs will be required – The creation of an effective marketing strategy requires a variety of inputs and information related to budgets, marketplace trends, competitive intelligence, and other sources. Reference the sample strategy document for context on the types of information required.
- Areas to be edited/completed are indicated in **blue text**.
- This is the instruction document, please use the blank template, included in this toolkit, to complete your own marketing strategy pitch deck.
 - The blank template can be manipulated to add/delete/resize elements and customize as appropriate for your organization.
 - This document can be integrated with additional slides, resources, or assets from your own existing organization's templates and methods.

A yellow callout box with a white background and a yellow border. It has a triangular pointer on the left side pointing towards the main content area. The text inside is black and bold.

This slide can be used OR may be replaced with an 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**

- Agenda structure aligned to flow of strategy pitch deck
- No changes are required if the standard structure is utilized.
- If your strategy is customized by adding/deleting/moving content the agenda may need to be adjusted accordingly

Framing

Framing categories standard, no edits should be required.

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

- Include 2- to 3, 15- to 20-word bullets related to each of the framing categories
- Remember the importance of helping the audience understand how the strategy was developed to improve credibility

Executive Summary – A single page summary of the overall marketing strategy pitch deck

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
Priority - 5-8-word statement for each business priority	<ul style="list-style-type: none"> 5- to 10-word bullet on priority-related marketing problems to be solved. No more than 2-3 bullets per priority 	<ul style="list-style-type: none"> 15- to 20-word bullet – Feature description of highest profile initiatives related to each business priority. Maximum - 2-3 bullets per priority 	2022 Budget = \$XXXMM 2023 Budget = \$XXXMM +\$XXXMM Budget Drivers:
Priority - 5-8-word statement for each business priority	<ul style="list-style-type: none"> 5- to 10-word bullet on priority-related marketing problems to be solved. No more than 2-3 bullets per priority 	<ul style="list-style-type: none"> 15- to 20-word bullet – Feature description of highest profile initiatives related to each business priority. Maximum - 2-3 bullets per priority 	<ul style="list-style-type: none"> Bullet – 10- to 12-word description of each budget driver. Bullet – 10- to 12-word description of each budget driver. Bullet – 10- to 12-word description of each budget driver. Bullet – 10- to 12-word description of each budget driver.
Priority - 5-8-word statement for each business priority	<ul style="list-style-type: none"> 5- to 10-word bullet on priority-related marketing problems to be solved. No more than 2-3 bullets per priority 	<ul style="list-style-type: none"> 15- to 20-word bullet – Feature description of highest profile initiatives related to each business priority. Maximum - 2-3 bullets per priority 	Critical Decisions Outstanding
Priority - 5-8-word statement for each business priority	<ul style="list-style-type: none"> 5- to 10-word bullet on priority-related marketing problems to be solved. No more than 2-3 bullets per priority 	<ul style="list-style-type: none"> 15- to 20-word bullet – Feature description of highest profile initiatives related to each business priority. Maximum - 2-3 bullets per priority 	<ul style="list-style-type: none"> 10- to 20-word bullets describing critical, outstanding, strategy-related decisions that must be made. 10- to 20-word bullets describing critical, outstanding, strategy-related decisions that must be made. 10- to 20-word bullets describing critical, outstanding, strategy-related decisions that must be made.

Identify and articulate related marketing problem to be solved

Critical to anchor strategy to most significant business priorities

• Requires summary of previous year budget and proposed current year

 • Include most significant drivers of year over year changes

Previous Year Performance and Insights – Critical building block to inform current year proposed strategy

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.

Business Priority	Outcomes	Insights/Learning
Previous year business priority	<ul style="list-style-type: none"> 10- to 15-word bullet on priority-related outcomes from the previous year Maximum 2-3 bullets per priority 	<ul style="list-style-type: none"> 10- to 15-word bullet on key insights related to the business priority from the previous year Maximum of 2 bullets per priority
Previous year business priority	<ul style="list-style-type: none"> 10- to 15-word bullet on priority-related outcomes from the previous year Maximum 2-3 bullets per priority 	<ul style="list-style-type: none"> 10- to 15-word bullet on key insights related to the business priority from the previous year Maximum of 2 bullets per priority
Previous year business priority	<ul style="list-style-type: none"> 10- to 15-word bullet on priority-related outcomes from the previous year Maximum 2-3 bullets per priority 	<ul style="list-style-type: none"> 10- to 15-word bullet on key insights related to the business priority from the previous year Maximum of 2 bullets per priority
Previous year business priority	<ul style="list-style-type: none"> 10- to 15-word bullet on priority-related outcomes from the previous year Maximum 2-3 bullets per priority 	<ul style="list-style-type: none"> 10- to 15-word bullet on key insights related to the business priority from the previous year Maximum of 2 bullets per priority








Reflect on previous year’s most significant business priorities

Other Insights
<ul style="list-style-type: none"> Bullet – 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. Bullet – 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. Bullet – 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. Bullet – 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. Bullet – 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.

Insights and learning from the previous year should be the context for the proposed current year marketing strategy

Business and Market Context – Executive summary level overview of key trends and environmental factors that may impact the business. These categories are based on the [Gartner TPESTRE](#) framework Completion of this slide will require gathering insights from a variety of internal and external sources.

Business and Market Context

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

Competitive Context – Provide a summary-level view of key competitors. This is not intended to represent a detailed competitive analysis, but simply a high-level callout of key competitors and notable competitive dynamics.

Competitive Context

Significant Competitors		Competitive Summary / Highlights	Risk Level
Competitor Name	Competitor Logo (optional)	<ul style="list-style-type: none"> • 15- to 25-word bullet - featuring notable highlight or detail about the named competitor • Maximum – 2-4 bullets per competitor • Only highlights – Competitive context here should be simply highlights of other more detailed competitive analyses not featured within the strategy document 	Indicate estimated risk level this competitor represents (low/moderate/high)
Competitor Name	Competitor Logo (optional)	<ul style="list-style-type: none"> • 15- to 25-word bullet - featuring notable highlight or detail about the named competitor 	Indicate estimated risk level this competitor represents (low/moderate/high)
Competitor Name		<p> Showcase the most notable aspects of named competitors including key differentiators, competitive advantages, or concerns about potential competitive strategies. </p>	Indicate estimated risk level this competitor represents (low/moderate/high)
Competitor Name	Competitor Logo (optional)	<ul style="list-style-type: none"> • 15- to 25-word bullet - featuring notable highlight or detail about the named competitor • Maximum – 2-4 bullets per competitor • Only highlights – Competitive context here should be simply highlights of other more detailed competitive analyses not featured within the strategy document 	Indicate estimated risk level this competitor represents (low/moderate/high)
Competitor Name	Competitor Logo (optional)	<ul style="list-style-type: none"> • 15- to 25-word bullet - featuring notable highlight or detail about the named competitor • Maximum – 2-4 bullets per competitor • Only highlights – Competitive context here should be simply highlights of other more detailed competitive analyses not featured within the strategy document 	Indicate estimated risk level this competitor represents (low/moderate/high)

Indicate at a summary level the approximate competitive risk for each named competitor.

Strategic Principles and Constraints – Provide visibility to the underlying core principles driving strategic decisions as well as constraints marketing and/or the business may have that impact strategy development.

Strategic Principles and Constraints



Decision – Prioritization Principles

Drivers of Key Decisions and Prioritization

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

Principles can help provide context on why certain strategic approaches were selected.



Constraints

Factors that may limit or impede the pursuit of strategy

Name of constraint	25- to 35-word description of the constraint. See the sample document for examples.
Name of constraint	25- to 35-word description of the constraint. See the sample document for examples.
Name of constraint	25- to 35-word description of the constraint. See the sample document for examples.
Name of constraint	25- to 35-word description of the constraint. See the sample document for examples.

Constraints should include significant factors that must be considered in the development of the marketing strategy.

Priority Stories – Priority stories showcase marketing's alignment to business priorities and outline the specific activities supporting and driving each priority. It's absolutely essential that these stories are clear, intuitively connected to the business priority, and provide the right level of detail. These are executive-level stories, so they will also require an eye on the related measurement and metrics that indicate success.

Priority Story

Summary paragraph – Insert approximately 50-word summary of the business priority, ideally touching briefly on each of the related core marketing initiatives. (See sample strategy document for examples.)

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

Anchored in one of the 3-5 core business priorities named in the Executive Summary. You will have one Priority Story slide per named business priority.

Measurement and quantification of objectives are always important to an executive audience. Provide macro-level targets

Capability Maturity/Assessment – Providing a snapshot of current, and desired, marketing capabilities is an important part of the marketing strategy narrative. The visualization below is a sample result from the [Gartner Marketing SCORE assessment](#), which provides a powerful and comprehensive method of evaluating marketing capabilities. Using Gartner tools, or your own internal assessments, CMOs must provide visibility to current capabilities, and potential gaps, that may impede the achievement of strategic goals.

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.



Gartner Marketing SCORE assessment also indicates areas where current maturity levels are adequate.

Gartner Marketing SCORE assessment provides prioritization of capabilities based on importance and maturity gaps

- 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 Snapshot – Executive-level overview of the marketing budget. Intended to provide visibility into key categories like headcount and martech. Snapshot also provides insight into YoY variance as well as a comparison to overall Gartner budget benchmarks.

Budget Overview	Headcount	Martech	Other Budget Callouts
<p>Previous Year Budget = \$XXXMM Proposed Budget = \$XXXMM</p> <p>YoY variance = \$XXXMM</p> <p>Budget Drivers:</p> <ul style="list-style-type: none"> • 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 	<p>2022 Staff = XXX 2023 Proposed = XXX</p> <p>XXX YoY role variance</p> <p>Key Hires:</p> <ul style="list-style-type: none"> • 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 	<p>2022 Budget = \$XXMM 2023 Budget = \$XXMM</p> <p>\$XXMM YoY variance</p> <p>Budget Drivers:</p> <ul style="list-style-type: none"> • Budget driver – 10- to 20-word description of each element contributing to budget shifts. • Budget driver – 10- to 20-word description contributing to budget • Budget driver – 10- to 20-word description contributing to budget 	<ul style="list-style-type: none"> • Budget callout – 10- to 15-word description of other notable budget-related items worthy of executive attention. • Budget callout – 10- to 15-word description of other notable budget-related items worthy of executive attention. • Budget callout – 10- to 15-word description of other notable budget-related items worthy of executive attention. • Budget callout – 10- to 15-word description of other notable budget-related items worthy of executive attention. • Budget callout – 10- to 15-word description of other notable budget-related items worthy of executive attention.

Quarterly budget breakout leverages standard Gartner category breakouts from annual surveys. Quarterly breakout offers additional insight on timing and categorization of spend.

Include other relevant, meaningful callouts related to key aspects of the marketing budget

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
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Integrate Gartner benchmark to indicate overall spend versus current marketing budget trends

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

Measurement Overview – Focus of this slide is to educate executives on marketing strategy and approach to measurement, not to provide specific metrics or performance reporting. Metrics and objectives are included on Priority Story slides as well as in other areas of the presentation.

Measurement Overview

Gartner's Hierarchy of Marketing Metrics



Help executives understand how tactical marketing measures roll up to overall marketing impact and value" and how marketing will be measured at different altitudes of tactical to strategic.

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.


Feature highlights related to marketing measurement methods, tools, and strategies that would be meaningful for the audience to understand. This is about how marketing will be measured, not sharing a narrative about marketing performance

Business and Strategy Impact
(Stewardship of marketing resources)

Operation and Optimization
(Agility, testing, continuous improvement)

Risks / Stops / Asks – Communicate any risks not already covered previously in the document, highlight areas to be discontinued, and include explicit requests for decisions to be made in support of the marketing strategy.

Risks / Stops / Asks

 Risks	 Stops	 Asks
<ul style="list-style-type: none"> • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. • Risk – 20- to 30-word description of risks that may jeopardize the success of the proposed marketing strategy. 	<ul style="list-style-type: none"> • Element to be stopped – 25- to 35-word description of programs or other marketing efforts that will be explicitly discontinued. May include brief context on the justification for discontinuation. • Element to be stopped – 25- to 35-word description of programs or other marketing efforts that will be explicitly discontinued. May include brief context on the justification for discontinuation. • Element to be stopped – 25- to 35-word description of programs or other marketing efforts that will be explicitly discontinued. May include brief context on the justification for discontinuation. • Element to be stopped – 25- to 35-word description of programs or other marketing efforts that will be explicitly discontinued. May include brief context on the justification for discontinuation. • Element to be stopped – 25- to 35-word description of programs or other marketing efforts that will be explicitly discontinued. May include brief context on the justification for discontinuation. 	<ul style="list-style-type: none"> • Audience-specific request – 25- to 35-word description of any critical requests or decisions required to move the marketing strategy forward. • Audience-specific request – 25- to 35-word description of any critical requests or decisions required to move the marketing strategy forward. • Audience-specific request – 25- to 35-word description of any critical requests or decisions required to move the marketing strategy forward. • Audience-specific request – 25- to 35-word description of any critical requests or decisions required to move the marketing strategy forward. • Audience-specific request – 25- to 35-word description of any critical requests or decisions required to move the marketing strategy forward.

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
- Bullet – Required next step for moving marketing strategy forward

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