



# B2B marketing plan

## TEMPLATE

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MARKETING  
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**Producing a marketing plan** is perhaps not the most exciting part of a marketer's job. However, it's a necessary step if you want to achieve your wider objectives and fulfil the ambitions you have for your brand. This template should allow you to clearly define your strategy and identify the concrete ways in which you can deliver successful marketing campaigns.

## The landscape

1.

- 1.1 Target market:** Define your market place. What are the characteristics of the businesses you are aiming to sell to? How many of them are there? What is your market share and how is it trending?
- 1.2 How the market segments:** Break your target customers down into distinct segments based on their profiles, both as businesses and individuals: their needs, value drivers, behaviours and aspirations. Where relevant and meaningful, use buyer personas to illustrate these customers.
- 1.3 Value of a customer:** Define the value of a customer in each segment (e.g. their lifetime value, annual value and average order value). Identify which customer segments represent your 'best customers'.
- 1.4 Competitors:** Who are your key competitors in the market place and what share of the market do they have? How do they differentiate themselves from your business/brand?
- 1.5 Competitive stance:** How does your business/brand meaningfully differentiate itself from your key competitors? What is the unique value proposition that makes you different and preferable?
- 1.6 Challenges and opportunities:** What developments are happening in the marketplace and/or your business that your marketing plan needs to specifically address?





## Focus of effort

# 2.

**2.1 Strategic focus:** What does your marketing plan need to focus on achieving at a strategic level? This could be:

- Increasing the number of new business wins.
- Increasing the size and value of business wins.
- Decreasing the attrition rate.
- Increasing the share of a particular segment of the market.

**2.2 Tactical focus:** What will you focus on in the next year to achieve the goals identified above? This might be lead generation, marketing qualified lead (MQL) generation, lead nurturing or sales conversions.

**2.3 Value of a customer:** Quantify what successfully achieving your goals will look like. Examples include: percentage of market share, number of new business wins, website conversion rate, target cost per lead, target monthly MQLs generated.



## Channel strategy

# 3.

This part of your plan sets out which channels you will use to engage with your target market and summarises how you plan to use each one, including key marketing initiatives.

**3.1 Paid media:** This includes reach owned by others, such as online display and retargeting, print display, social media ads, Google ads, TV and radio ads, direct mail, trade shows, online and offline events.

**3.2 Owned/granted media:** This includes channels to your market that you own and control, such as your website, blog, customer base email marketing and SMS, and your own online and offline events.

**3.3 Earned media:** These are the channels that rely on others sharing content about your brand. This section includes social media sites, blogs, review sites, organic search and PR/media relations.

**3.4 Partner/channel marketing:** Set out your plans for re-sellers or referrers who, with your marketing support, will serve as a channel to market.



## Content development

# 4.

What types of content will you need to support your marketing efforts? These could include whitepapers, research reports or videos. What types of sales support materials will be needed?



## Technology development

# 5.

What marketing technology and database development will you need to support your initiatives?



## Reporting metrics and KPIs

# 6.

How will you measure and report on success against your strategic and tactical objectives? What will your reporting dashboard look like and which particular metrics will be your critical KPIs?

