

Remember to Prioritize Your Marketing Plan Activities by: Urgency, Value, Ease, and Opportunity							
GOALS			KEY OBJECTIVES			EOY Key Results	
Gain 800 demos from inbound leads per quarter			Track CPL and conversions, etc., A/B test Google ads & social media ads			Goal reached - increased leads by over 1,000% ( <a href="#">Report</a> )	
Increase organic traffic significantly			Create foundation for website to attract organic traffic through SEO, content, and backlinks			Goal reached ( <a href="#">Google Analytics</a> and <a href="#">Google Console</a> reports)	
Get website to rank for keyword phrases that show purchase intent per vertical			Perform SEO audit and execute the content strategy			Goal reached, placement of 3 key phrases in 1st (Traffic Report)	
Delight existing customers and improve customer retention			Create product marketing assets and communications to improve feature adoption			Goal reached, reviewed by CEO and VP of Product	
Be a Resource Hub to help people run their business & establish a thought leadership role			Build a following/tribe around shared values and resources for local, small businesses			Goal reached per CEO	
Assist sales team to improve their conversions meet their sales goals			Develop a variety of end-of-funnel assets and sales enablement tools			Goal reached, per VP of Sales (link to <a href="#">Salesforce report</a> )	
Establish a unique and consistent brand voice			Develop and distribute brand guide			Goal reached - <a href="#">Brand Guide</a>	
Sales Cycle Stage	Outcomes	Tools and Tactics	Priority	Demand Gen	Design	KPIs	EOY Results and Data
Top of the Funnel Generate Interest & Awareness:	Increase Visibility & Drive Brand Awareness	Blogging for organic SEO 1x/week	A			Traffic, leads, subscribers	Goal reached ( <a href="#">link to data</a> )
		Create Keyword Report for product search terms for each vertical and blog topics	A			Increased website traffic, opens, clicks, leads	Goal reached - <a href="#">Keyword Report</a>
		Social media strategy & execution (Instagram and FB posts: with content showcasing customer success, company culture, products/services, innovation, etc.)	A	√	√	Impressions, targeted follower growth, engagement (likes, shares, comments)	Goal reached ( <a href="#">link to report</a> )
		Ask relevant industry/vertical experts for interviews to use in blogs and YouTube videos	C	√		Audience size/reach, comments, opportunity for co-branded marketing	Goal reached
		Find backlink opportunities	B	√			Goal reached ( <a href="#">view backlink report</a> )
	Educate with New Ideas & Thought Leadership	Longform content (longer articles and knowledge sharing resources for website and paid placement in industry publications)	B	√	√	Reach, views, clicks, comments	Goal reached - Launched Industry reports and ebooks (link to reports, <a href="#">Google Console</a> and <a href="#">Pardot</a> )
		YouTube videos: interview with industry experts, thought leadership content, testimonials, and short tutorial videos) SEO optimized, also TikTok style short videos	A	√	√		Goal reached ( <a href="#">link to report</a> )
		Webinars in partnership with professional organizations, publications, and associations	B	√	√	# of attendees, email capture for follow up nurture, follow up conversations	Goal reached - webinars were successful lead magnets ( <a href="#">link to report</a> )
		Industry events	C	√	√	Email capture for follow up nurture	Goal reached - ( <a href="#">events report</a> )
	Generate More Leads through Content and Digital Advertising/Media	Improve results from Google ads and social media ads	A	√	√	Increase conversions, lower cost per lead	Goals reached - CPL at \$177/lead ; 1000% increase in inbound leads ( <a href="#">link to tracking</a> )
		Boosted organic social content	A	√	√	Impressions, clicks, conversions	Goal reached - 180% organic reach increase ( <a href="#">link to social media report</a> )
		Influencer marketing	C	√		Audience reach (# of downloads/month), website link clicks, responses to special offer	Goal reached - influencer marketing video ads have high conversion rates ( <a href="#">link to report</a> )
		Test landing pages and website CTAs (improve existing pages)	B	√		Form fills, downloads, email captures	Goal reached ( <a href="#">link to tracking spreadsheet</a> )
		Annual Trends Report for each vertical	A			Form fills, downloads, email captures	Goal reached ( <a href="#">link to Pardot report</a> )
Middle of the Funnel Provide Value & Earn Trust:	Build Credibility, Authority, & Rapport by Teaching	Website, improve messaging, headlines/SEO (begin with a site audit)	A			Site visits, duration, #pages visited, rankings, items clicked, form fills, demos	Goal reached ( <a href="#">Google Analytics</a> & <a href="#">Console</a> reports, <a href="#">SEO audit</a> )
		Co-promotion with industry publications and associations (webinars, round tables, etc.)	A	√	√	Visibility, # of partner touch points, growth in email subscriber base/contacts,	Goal reached ( <a href="#">link to Pardot report</a> )
		Case studies and testimonials	A		√	form fills, demos	Goal reached ( <a href="#">link to report</a> )
		Industry report webinars	A	√	√	Form fills, downloads, email captures, demos	Goal reached ( <a href="#">link to Pardot report</a> )
	Strengthen the Sales Effort By Delivering Value						
		Demo videos and product value prop videos	B	√	√	Views, demos	Goal reached ( <a href="#">link to report</a> )
		Assessment & ROI calculator (self-service)	B	√	√	Form fills, demos	Goal reached ( <a href="#">link to report</a> )
		Comparison chart/infographic	A		√	Demos	Goal reached ( <a href="#">link to demo report</a> )
	Nurture Customer Engagement and Stay Top of Mind	Blog category offers real-world customer experiences	C		√	Site visits, duration, items clicked, form fills, demos	Goal reached ( <a href="#">Google Analytics</a> & <a href="#">Console</a> reports)
		Email nurture campaigns - review segmentation and rebuild nurture flows, add lead scoring	B	√	√	Opens, clicks, demos	Goal reached ( <a href="#">link to report</a> )
		Email Newsletters/Resources	C		√	Distribution, opens, clicks, demos	Goal reached ( <a href="#">link to report</a> )
		Lead magnets and gated content	B	√	√	Form fills, downloads, email captures, demos	Goal reached ( <a href="#">link to report</a> )
		Establish hand-off process, MQL to SQL	B	√		Demos, deals closed	Goal reached - MQL and SQL established

Close the Deal: Bottom of the Funnel	Accelerate Closing and Improve Ratio of Deals Won	Customer Expectation sheet	B		√	Demos, deals closes	Goal reached, sheet created ( <a href="#">link to open report</a> )
		Product and testimonial videos for each vertical	C			From fills, demos, deals closed	Goal reached ( <a href="#">link to report</a> )
		Sales Proposal template	A		√	Distribution, use, and improvement in % of deals closed	Goal reached ( <a href="#">link to report</a> )
		Feature Comparison Chart	A		√	From fills, demos	Goal reached ( <a href="#">link to report</a> )
		Sales Enablement Tools	B	√	√	Improvement in % of deals closed	Goal reached ( <a href="#">link to report</a> )
Depth, Delight & Brand Loyalty: Build our Referral Engine	Reward Customer Loyalty and Build Brand Champions	Partner thank yous and anniversary spotlights on email & social	B	√	√	Opens, clicks, responses	Goal reached - spotlights on social media
		User groups and training webinars	C	√	√	Participation, upsell/cross sell opportunities closed	Goal reached - Customer FB Group started and webinars held
		Help Center and Resource Library	A	√	√	Downloads and site visits	Goal reached - <a href="#">Resource library</a> launched
		Invitation to participate in thought leadership, webinars, online showcases, press releases, etc.	C	√	√	Participation, responses	Goal partially achieved - Customer Advisory Board launched, webinars conducted, more opportunities planned
		Partner nurture email campaigns	A	√	√	Opens, clicks, responses	Goal reached - newsletters, new customer drip, etc. ( <a href="#">Report</a> )