Marketing plan template for B2B startups

Use this template as a starting point to create your marketing plan. Make sure to adapt it for your niche and business.

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Contents

Business analysis and summary

Company overview

{{Company name}} is a {{company description}} headquartered in {{headquarters location}}. Following are the firmographic details of the company:

- Revenue:
- Industry:
- Sub-industry:
- Region: HQ and office locations
- Number of employees:

Founding story

{{Founding story in 200 to 300 words}}

Our vision

{{vision statement}}

{{vision statement explanation}}

Our mission

{{mission statement}}

{{mission statement explanation}}

Our leadership

The company's key executive team includes the following members *(*add or remove based on the roles you have at your company)*:

- CEO: {{Name}}, {{Link to LinkedIn profile}}
- COO: {{Name}}, {{Link to LinkedIn profile}}
- CTO: {{Name}}, {{Link to LinkedIn profile}}
- CMO: {{Name}}, {{Link to LinkedIn profile}}

Our customers

{{Company name}} serves x+ customer across {{list of countries/regions}}. Following are some of the marque customers we have:

- {{Customer 1}}
- {{Customer 2}}
- {{Customer 3}}

Funding details

The {{company name}} has raised {{funding amount}} from {{investors' names}} on {{funding date}}.

{{Link to the press release}}

Partner ecosystem

Partner name	Partnership description
{{Partner 1 name}}	{{Description of partnership 1}}
{{Partner 2 name}}	{{Description of partnership 2}}
{{Partner 3 name}}	{{Description of partnership 3}}

| {{Partner 4 name}} | {{Description of partnership 4}} |

Social media details

- {{Link to LinkedIn page}}
- {{Link to Twitter page}}
- {{Link to Facebook page}}
- {{Link to YouTube channel}}

*(*add or remove links to social media profiles depending on where you are present)*

Products and services

S No	Product/service name	Product/service description (including problems they solve)	Overview of target persona
1	{{Product/service 1 name}}	{{Product/service 1 description}}	{{description of target persona of product/service 1}}
2	{{Product/service 2 name}}	{{Product/service 2 description}}	{{description of target persona of product/service 2}}
3	{{Product/service 3 name}}	{{Product/service 3 description}}	{{description of target persona of product/service 3}}

Breaking down the target market

Product name	Firmographic criteria		Demographic criteria
Product 1	Region		{{Job title and designation 1}}
	Revenue range		{{Job title and designation 2}}
	Industry		{{Job title and designation 3}}
	Subindustry		{{Job title and designation 4}}
	Number of employees		
	Funding status		
Product 2	Region		{{Job title and designation 1}}
	Revenue range		{{Job title and designation 2}}
	Industry		{{Job title and designation 3}}
	Subindustry		{{Job title and designation 4}}
	Number of employees		
	Funding status		
Product 3	Region		{{Job title and designation 1}}
	Revenue range		{{Job title and designation 2}}
	Industry		{{Job title and designation 3}}
	Subindustry		{{Job title and designation 4}}
	Number of employees		
	Funding status		

*if required, add any additional criteria that might be relevant for your business

Positioning and messaging

Positioning statements

S No	Product/service name	Product/service description (including problems they solve)	Positioning statement
1	{{Product/service 1 name}}	{{Product/service 1 description}}	{{positioning statement of the target persona of product/service 1}}
2	{{Product/service 2 name}}	{{Product/service 2 description}}	{{positioning statement of the target persona of product/service 2}}
3	{{Product/service 3 name}}	{{Product/service 3 description}}	{{positioning statement of the target persona of product/service 3}}

Messaging statements

S No	Product name	Messaging variants
1	Product 1	{{Messaging variant 1}}
		{{Messaging variant 2}}
		{{Messaging variant 3}}
		{{Messaging variant 4}}
2	Product 2	{{Messaging variant 1}}
		{{Messaging variant 2}}
		{{Messaging variant 3}}
		{{Messaging variant 4}}
3	Product 3	{{Messaging variant 1}}
		{{Messaging variant 2}}
		{{Messaging variant 3}}
		{{Messaging variant 4}}

Competitor benchmarking

From a business standpoint

SWOT analysis

Strengths	Weaknesses
● What the company is good at in terms of capabilities, people, and market presence ● The advantages the company has over the competition	● Areas that need improvement ● Weak points in comparison with specific competitors
Opportunities	**Threats**
● The biggest gap the company can fill today	● Threat from players offering similar solutions

● The leverages the company has in the form of funding, technology, people, etc., that can facilitate immediate growth	● Threat from companies solving the same problem using a different solution

From a marketing standpoint

Competitor name	Category	Key information and data points
{{Competitor 1}}	Marketing overview	
	Positioning, value proposition, and messaging	
	Website traffic analysis	
	SEO audit	
	Content audit	
	Social media audit	
	Ads analysis	
	Martech analysis	
	Email marketing audit	
	Website chat analysis	
	Online and offline event analysis	
	Other online activities	

Refer the below article to learn in detail how to do competitor analysis from a marketing standpoint:

https://www.linkedin.com/pulse/competitor-analysis-definitive-guide-from-marketing-naseef-kpo/?trackingId=ELVZlBOURtGUcV8lJMlcgg%3D%3D

USPs and differentiators

The problem	{{a brief of the problem the company's products or services are solving}}
The solution	{{a brief of the solution}}
Product/service details	{{a brief description of how the product/service helps with the solution}}
Quantifiable outcomes for customers	{{Quantitative outcome 1}}
	{{Quantitative outcome 2}}
	{{Quantitative outcome 3}}
Qualitative outcomes for customers	{{Qualitative outcome 1}}
	{{Qualitative outcome 2}}
	{{Qualitative outcome 3}}
Unique Selling Proposition (USP)	{{USP statement}}
Elevator pitch	{{a short pitch on why customers should buy from you}}

Goal setting for the marketing team

Team level goals

- To generate X value of pipeline for the {{period}} with x% for {{product 1}}, y% for {{product 2}}, and z% {{product 3}}.
- To generate X number of SQLs (Sales Qualified Leads) for the {{period}} with x% for {{product 1}}, y% for {{product 2}}, and z% {{product 3}}.

add or remove goals based on what the management has set as goals for the marketing team in your company

Team member goals

Team	KRAs/KPIs
{{Team member 1}}	{{KRA/KPI 1}} {{KRA/KPI 2}} {{KRA/KPI 3}}
{{Team member 2}}	{{KRA/KPI 1}} {{KRA/KPI 2}} {{KRA/KPI 3}}
{{Team member 3}}	{{KRA/KPI 1}} {{KRA/KPI 2}} {{KRA/KPI 3}}

Marketing channels

Audience research

- {{Audience characteristic/behavior 1}}
- {{Audience characteristic/behavior 1}}
- {{Audience characteristic/behavior 1}}

Mapping channel preferences

based on the information collected on the market, competitors, and audience, arrive at a set of channels to prioritize for the year (or a specific period)

Channel name	Purpose/expected outcome	Person responsible for	Metrics to measure success
{{Channel 1}}			{{Metric 1}} {{Metric 2}} {{Metric 3}}
{{Channel 2}}			{{Metric 1}} {{Metric 2}} {{Metric 3}}
{{Channel 3}}			{{Metric 1}} {{Metric 2}} {{Metric 3}}

Content marketing plan

use the information obtained in all the previous stages – especially competitor benchmarking – to come up with a content strategy for your startup

Content type (blog, video, case study)	Frequency of publishing	Distribution channels	Can be repurposed into	Metrics for measuring success
{{Content type 1}}			{{list of content formats the content type can be repurposed into}}	
{{Content type 2}}				
{{Content type 3}}				
{{Content type 4}}				

Marketing campaigns and activities

the below table represents campaigns and activities at a team level. Make sure to break it down to team and individual-level activities within the marketing team.

Campaign/initiative name	Purpose/goal of the campaign	Duration/dates	Expected outcomes	Person responsible for	Metrics to measure success
{{Campaign 1}}					
{{Campaign 2}}					
{{Campaign 3}}					
{{Campaign 4}}					
{{Campaign 5}}					
{{Campaign 6}}					

The marketing team

Team structure

Roles and responsibilities

Member name	Key roles and responsibilities
CMO/head of marketing	
Marketing manager 1	

Marketing manager 2	
Marketing manager 3	

Marketing technology

Tool category	Tool name	Purpose	Yearly cost
Website, hosting, and database	{{Tool 1}}		
	{{Tool 2}}		
	{{Tool 3}}		
	{{Tool 4}}		
Email marketing/marketing automation			
CRM			
Website analytics and tracking			
SEO			
Content writing			
Graphic design and video editing			
Social media			
Video hosting and distribution			
B2B contacts database			
Podcasting			

Marketing budget

General marketing expenses

this category includes everything but the money you spend on martech and other subscriptions and fees. This would include:

Category	Subcategory	Allocated budget
General marketing expenses	Branding, design, & PR	
	Advertising and media buying	
	Content marketing	
	Website & SEO	
	Corporate marketing	
	Sales enablement	
	Market research and analyst relations	
	Event marketing	
	Travel expenses (other than events)	
	Partnership marketing	
	Agencies and third-party vendors	

Tools and subscriptions

Tools and subscriptions	{{List of tools}}	*add the cost obtained from the martech section here
	{{List of other subscriptions}}	

Review mechanism

Activity outcomes

Activity/initiative name	Expected outcome	Date of review	Stakeholders involved	Results	Next steps
{{Activity/initiative 1}}					
{{Activity/initiative 2}}					
{{Activity/initiative 3}}					
{{Activity/initiative 4}}					

Team member outcomes

prepare the below table separately for each team member

KRAs	KPIs	Goal achieved?	Next steps
{{KRA 1}}	{{KPI 1}}		
	{{KPI 2}}		
{{KRA 2}}	{{KPI 1}}		
	{{KPI 2}}		

About Naseef KPO

Naseef KPO is a B2B marketing consultant with extensive experience in leading marketing functions in multi-million dollar businesses. He has led large teams of marketers – more than 20 – including content marketers, SEO professionals, social media managers, website developers, marketing operations & analytics professionals, demand gen managers, etc.

As a consultant, he works with small to mid-size companies in the IT, tech, SaaS, and embedded systems industries to help redefine their marketing strategy to fit the modern B2B marketing landscape. He advises companies on areas such as content marketing, demand generation, account based marketing, go-to-market strategies, product marketing, and more. Write to him at naseef@skalegrow.com in case you want help taking your marketing outcomes to the next level.