

2026 COMPANYNAME EOS OGSM MARKETING PLAN TEMPLATE

Campaign Name	Objective	Theme		
Briefly state the company's overall Vision	Define specific marketing objectives aligned with the company's overall objectives. <i>Example:</i> Leverage an inbound marketing strategy to increase revenue 10%.	Break down each objective into measurable and time bound goals. <i>Example:</i> Generate 30% more leads through gated content such as ebooks, webinars, MAKE A COPY OF THIS TO YOUR FOLDERS		
Objectives	Measures/KPIs (EOS)	Key Tactics - Accountability Initials (EOS+OGSM)	Budget	Timeframe
1.0 Increase Customer Understanding <i>Develop high level marketing strategies that align with our EOS strategies</i>	<i>Identify key performance indicators that will track progress toward goals and objectives.</i> ☐ Develop 3 Personas ☐ Develop a resource library to support sales	<i>Identify key tactics and assign accountability</i> 1.1 Understand Our Customers + Competitors ☐ Research and develop personas - MM ☐ Develop an understanding of top keywords - PF ☐ Update our competitive analysis - AB ☐ Join 1-3 customer groups such as CPA group, law group or regional chamber this year - JA	<i>Create budget amounts to support tactics</i>	<i>What quarter</i>
2.0 Boost company positioning	☐ 1 Brand Style Guide	2.1 Define and Enhance our Positioning ☐ Create 3 Uniques ☐ Schedule facilitated sessions to evolve our messaging and the industries we serve 2.2 Enhance Brand Consistency ☐ Create a Brand Style Guide		

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3.0 Build Awareness	Increase Social Reach ☐ 25%↑ (###-###) LinkedIn Followers Increase Customer Satisfaction ☐ Implement Customer Survey or Awareness Survey ☐ ##% (Was: ##%) NPS annually	3.1 Build Customer Awareness and Brand Equity ☐ Launch targeted social media campaigns across platforms to reach and engage - EB ☐ Develop and share valuable and shareable content through blogs and videos - JW ☐ Promote our relationship with other 3 trade or regional publications - NM 3.2 Build Community/Speakers/Partnerships ☐ Create list of annual events for speaking _AE ☐ Develop a set of 1-3 Talks - AE ☐ Submit 1 significant speaking opp - AE ☐ Create enhanced listings with 3 top publications or directory services ☐ Industry memberships for key team members	\$899/Org	
4.0 Leverage Inbound marketing to increase leads	☐ 1 Website Re-launch ☐ 1 Overview Videos ☐ 3 Case Studies ☐ 2 blogs/month ☐ 1 new landing page/month ☐ Quarterly Sales Funnel ☐ 1 directory service listing updated/ month ☐ ##% Increase in Website Traffic ☐ Meet 1% Conversion Rate	4.1 Engage Customers Online ☐ Update website ☐ Create an overview video ☐ Develop an Executive KPI Dashboard ☐ Develop one awareness “campaign” in Q4 ☐ Price out an outsourced digital marketing firm services for manufacturing firms or digital marketing for MSPs like BigOrange Marketing 4.2 Create and Run an Editorial Calendar ☐ Create an Editorial Calendar ☐ Enroll team to provide thought leadership	\$4,088	

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	☐ 3-5 MQL/Month (Was:1-3/Month)	4.3 Support Sales with Collateral, Email ☐ Consolidate, manage existing email lists ☐ Grow email list with Google AdWords ☐ Build list of collateral needs, prioritize ☐ Select New CRM System such as HubSpot ☐ Implement Monthly Email Newsletter in Q4 ☒ 1-2 select digital placements		
		Remove this Budget Note: 7% Revenue per SBA recommendations: (\$140,000 for \$2M annual revenue) Remove this too: Here is a link to a blank OGSM-EOS-Marketing-Plan: https://docs.google.com/document/d/1nC1DpGLVE2TV8O6OHd7AN_F2V3NONDLFM3Kv_PwURsY/edit?usp=sharing		