


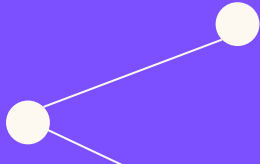
**Title:** The Annual Plan and the keys to getting yours approved.

**Abstract:** Building an annual GTM plan has never been more difficult. Change is occurring faster than ever. Consumer preferences constantly shifting, geo-political changes, supply chain disruption and increasing regulation. Is it even worth it?

This session will demonstrate the value of the annual go-to-market planning process, give you insight into how to help build a plan without all the friction, and give you some keys to getting approval with finance and your board.



The **Annual Plan**  
and the keys to  
getting **yours**  
approved.



Let's  
demystify  
planning



Finance is NOT  
your enemy.



They're **investors.**

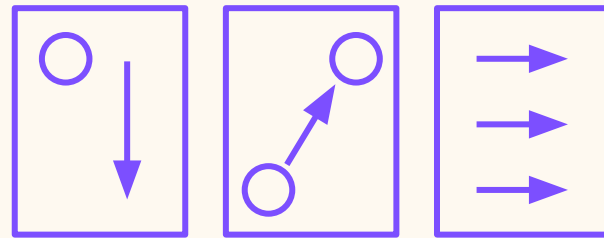
*We all WANT*

# Predictability



*We all HAVE*

# + Playbooks



## Product

led growth and company lifecycle determine the variations

**Sales** + **Marketing** Spend as a % of OPEX

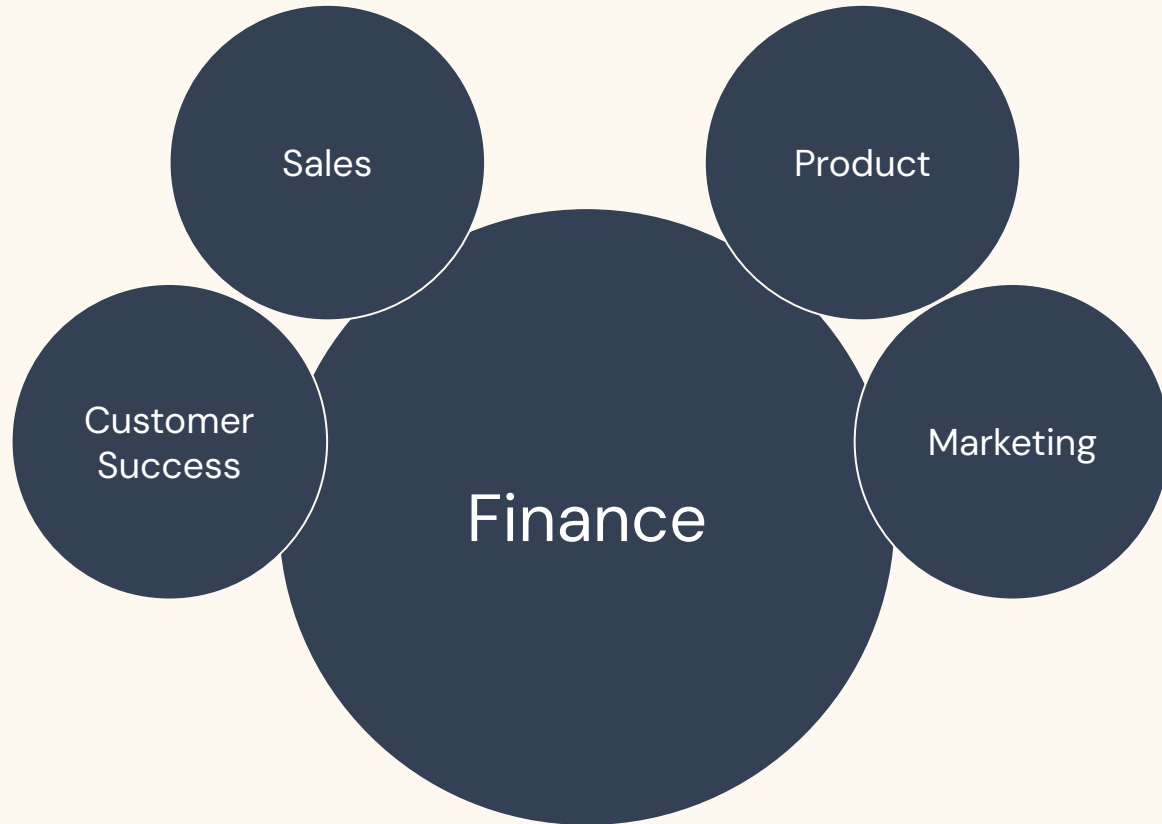
**Sales** + **Marketing** Spend as a % of Revenue

**Marketing** Spend as a % Revenue

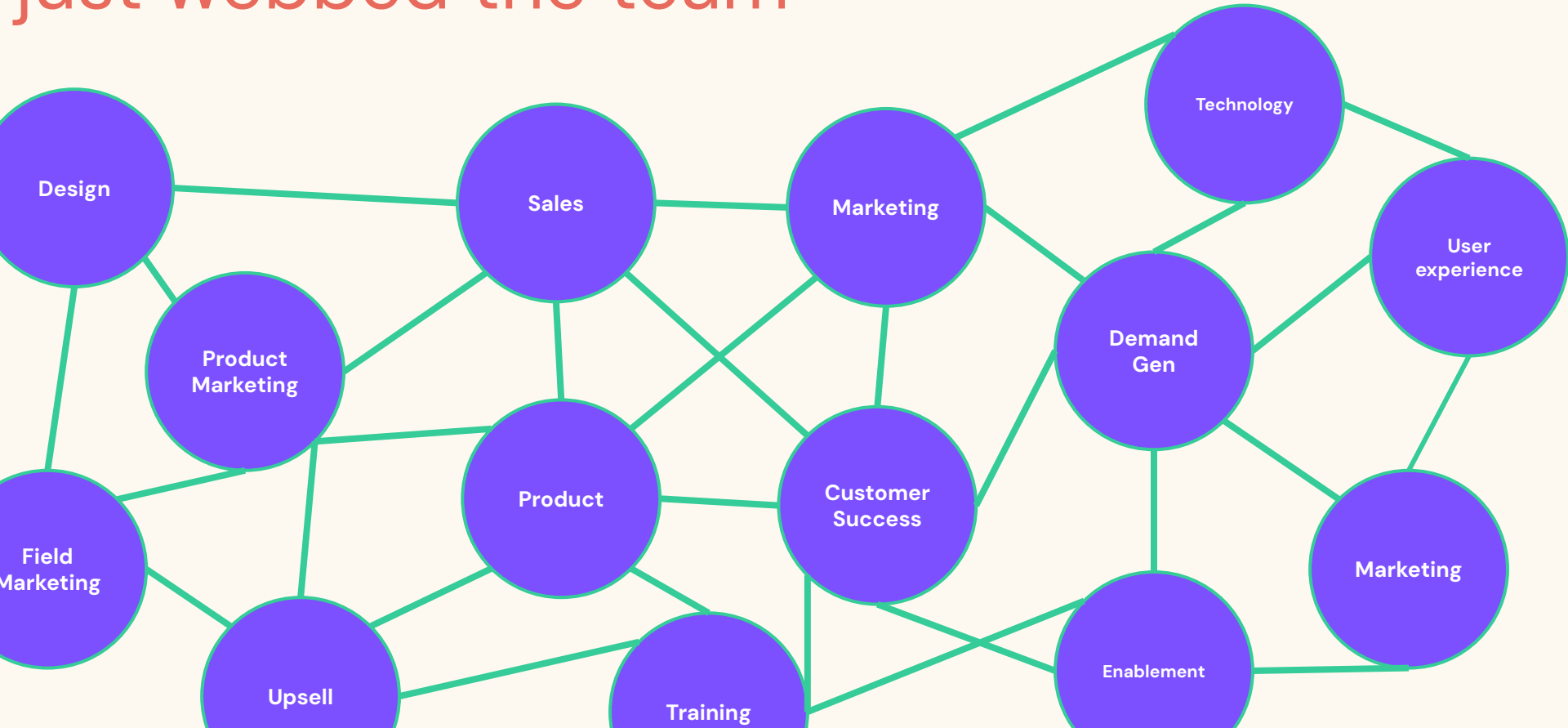
**Marketing** Spend (Programs vs Headcount)

Although we don't know each others' playbooks.

# Most annual planning processes end up looking like a four-eared Mickey Mouse



When in reality it should like Spiderman just webbed the team





# Firstly you need to agree to a **definition of metrics**

## **Financial**

Bookings  
Revenue  
ARR  
Gross Margin  
NRR  
FCF

## **Commercial**

Pipeline  
ASP  
Win rates  
Cost of pipe

## **Operational**

# Leads  
# MQLs  
# Meetings  
Conversion rates  
Channel metrics

# Align Company Objectives with Finance + Marketing Goals

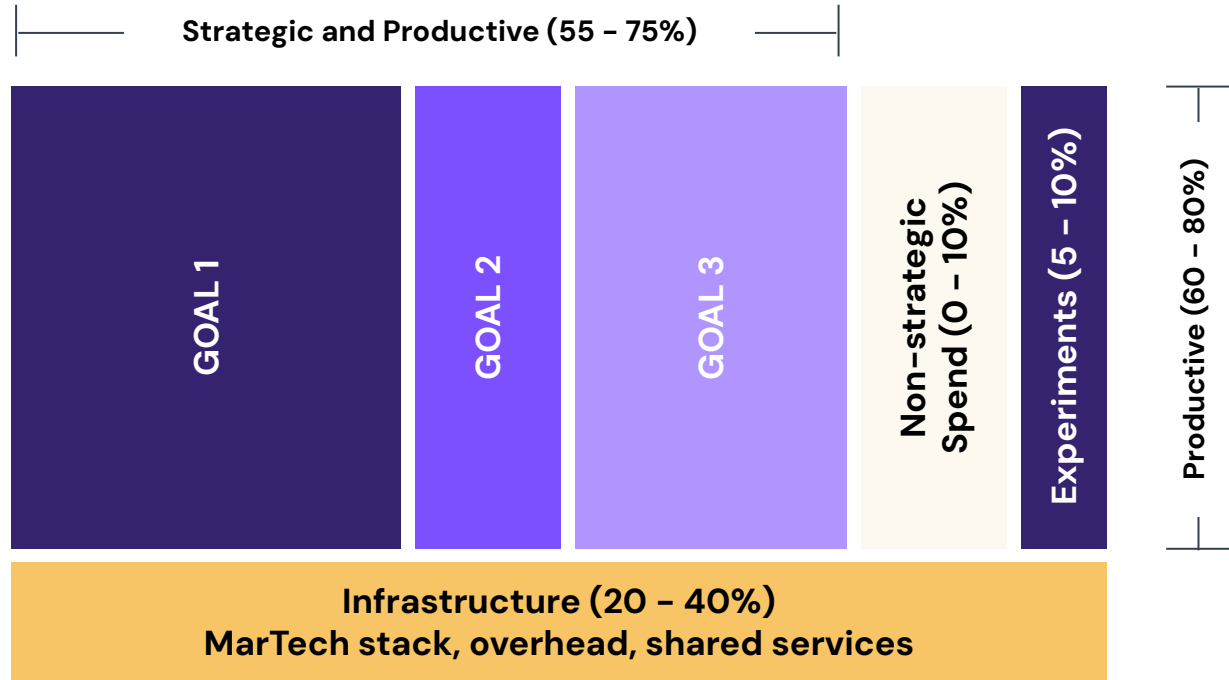
Business drivers for the year set by the executive team

Marketing & Finance have a role in achieving most company goals:

Company Goal	Opportunity
Grow sales	Lead generation, opportunity creation, sales tool creation
Introduce a new product	Launch product, create awareness for new product
Enter new geography	Create awareness, generate leads
Become #1	Thought leadership, share of voice, analyst ratings
Improve talent recruiting	Become “best places to work”

# Budget Allocation

Best practice budget distribution – mandate the funds you need to achieve the goals



Increase Sales

2M

\$6... \$350K \$4.1M

Sum of Allocation: \$ 6,480,000.00  
Sum of Spend: \$ 2,405,689.70  
Sum of Remaining Allocated: \$ 4,077,310.30

# Build

your plan with  
operational drivers.



# Communicate

your plan with  
commercial +  
financial outcomes!



# Financial terms



*"Generated \$2M in incremental pipeline, expected to convert to \$450,000 of incremental revenue based on historical conversion rates."*

# Marketing speak



*"Email campaigns delivered 14.5% CTR. Created 4,000 MQLs in Q2."*



planful

# Steps for building a plan

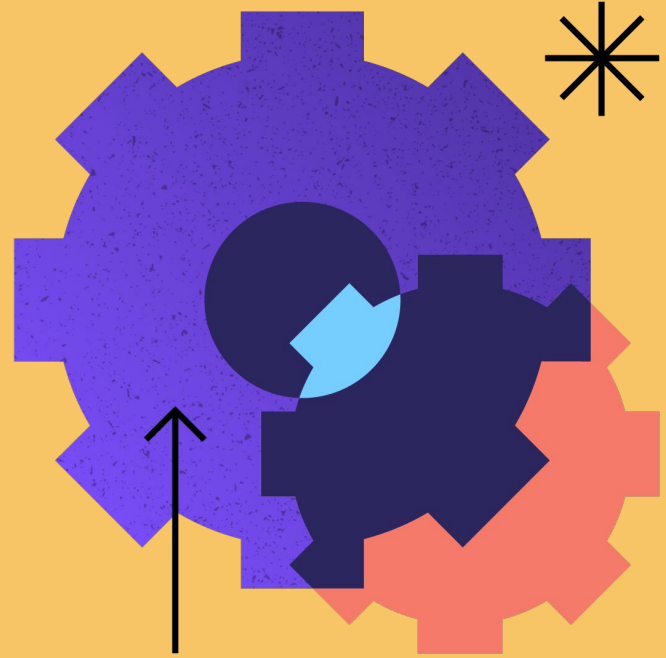
1. Select planning approach
2. Define goals
3. Apply metrics of achievement using funnels
4. Determine demand generation budget
5. Create overall budget with budget segments
6. Add in committed spend for the year
7. Assign team ownership

# How to demonstrate marketing value

1. Focus on results, not activities
2. Show the relationship to your goals
3. Communicate value in financial terms, not marketing terms
4. Context matters, your audience won't know what a good result is
5. Tell the truth
6. Tell the WHOLE truth
7. Take the opportunity to teach, but not preach



# Tools That Can Help You



# Operational Marketing Index

Test your marketing planning  
& budgeting acumen

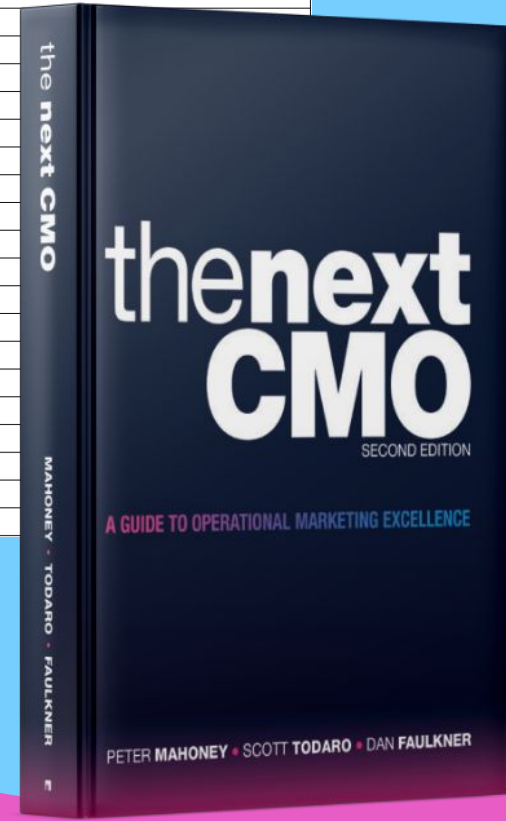
[planful.com/operational-marketing-index](https://planful.com/operational-marketing-index)



# The Next CMO: Second Edition

A Guide to Operational Marketing Excellence

Plan Element	
Situation analysis	
Market research & analysis	
Company goals	
Marketing goals	
Marketing strategies	
Target audience (including segmentation)	
Positioning and messaging	
Product and services direction and definition	
Pricing and packaging	
Competitive analysis	
Sales channel strategy	
Sales support	
Partner/channel strategy	
Product and services launches	
Campaigns	
Marketing channels (vehicles)	
Programs	
Marketing activity timeline	
Team structure, growth and responsibilities	
Technology (software)	
Budget allocation	
Testing	
Metrics of achievement	
Assumptions, dependencies, risks to success	



# Planful

- Build, execute, and measure marketing plans and budgets
- Collaborate on campaigns for pod efficiency
- Know the business value of your marketing with ROI measurement

[planful.com/marketing](https://planful.com/marketing)

Planful for Marketing

planful **Manage** Create Manage Dashboard History

**Manage**

Segment Goal Campaign Expenses

Create... Actions

Name	
<input type="checkbox"/> Drive Growth	0
<input type="checkbox"/> Leadership Conference Series	0
<input type="checkbox"/> Boston Leadership Conference	0
<input type="checkbox"/> Booth Expenses	0
<input type="checkbox"/> Sponsorships	0
<input type="checkbox"/> Travel	0
<input type="checkbox"/> Paris Leadership Conference	0
<input type="checkbox"/> San Francisco Leadership Conference	0
<input type="checkbox"/> Product Launch	0
<input type="checkbox"/> Martech Stack	0
Grand Total	0

All Expenses 156 Grand Total USD 441,245,678.67

**Booth Expenses**

Expense Name

Swag - Dog Treats

Created: 19 Jul 2022 Updated: 19 Jul 2022

Planned Amount \* USD 20,000.00 Actual Amount \* 580,199.15 Difference (560,199.15)

Timeframe \* Q1 Status Closed

GL Code 20-000010 PO # 101-245

Vendor Name ACME Dog Treats, Inc. Invoice Number 202742-1

Source Manual Entry Expense ID E-01234567

Owner Bridges Smith Expense Type PR Agency

Delivery date 2 Aug 2022 Segment Demand Gen - NA name

Parent Booth Expenses