

# Proven Strategies for Building Your Marketing Plan, Demonstrating Value, and Getting It Approved

**Rowan Tonkin**

Chief Marketing Officer  
Planful

# Meet the Speakers



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**Rowan Tonkin**  
CMO, Planful



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**Dave Gerhardt**  
Founder, Exit Five

# Let's demystify planning

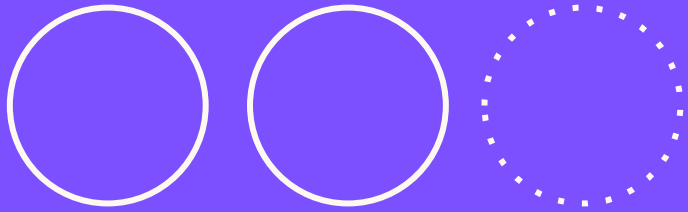


Finance is NOT  
your enemy.

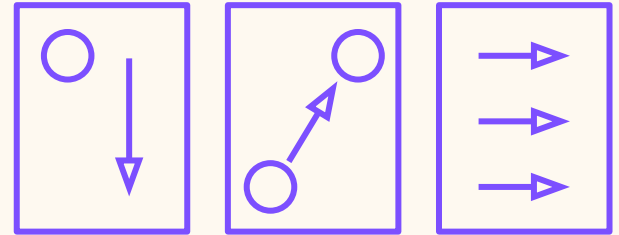


They're **investors.**

# Predictability



# + 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)

# Playbooks have rules.

# What rules do you need to play by?

We ~~MUST~~ SHOULD  
get more efficient  
over time



# Where can I learn about this?

- Benchmarkit – Reports
- The SaaS CFO – Courses/Newsletter
- Kellblog – Detailed blogs
- Mostly Metrics – Newsletter
- Insight Partners – Survey
- Analyst Firms (Gartner/Forrester/IDC)





# What are the **metrics** of your business?



## **Financial**

Bookings  
Revenue  
ARR  
Gross Margin  
NRR  
FCF

## **Commercial**

Pipeline  
ASP  
Win rates  
Cost of pipe

## **Operational**

# Impressions  
# Leads  
# MQLs  
# Meetings  
ROAS  
Channel metrics

# Build

your plan with  
operational drivers.



# Present

your plan with  
commercial +  
financial outcomes!



# Align Company Objectives with Marketing Goals

Business drivers for the year set by the executive team

Marketing has a role in achieving most company goals:

Company Goal	Marketing Goals
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"

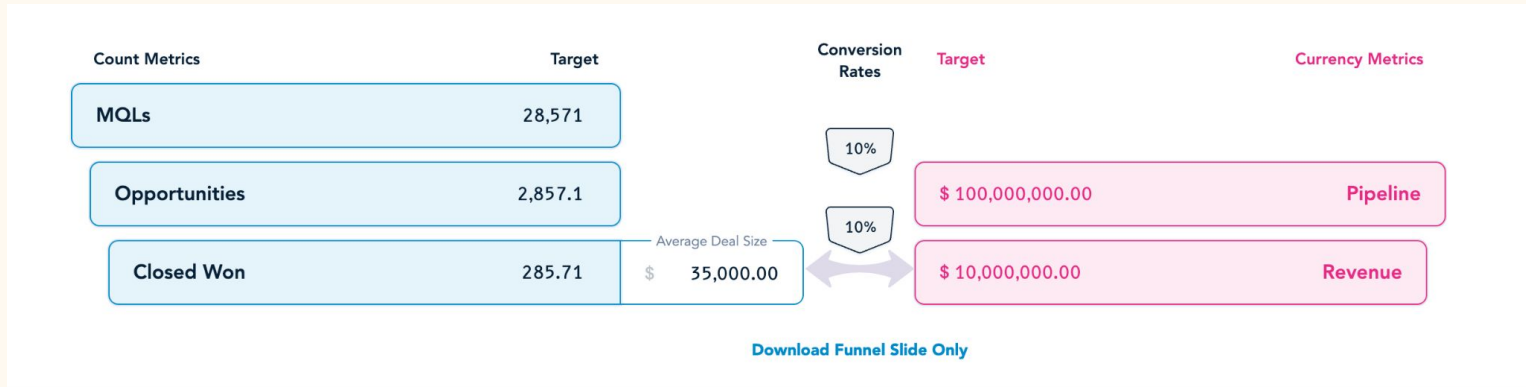
# Steps for building a plan

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

# Identifying the risks and dependencies of your plan



# Test your assumptions...



Finally, to calculate your budget, enter in a cost per pipeline ▾

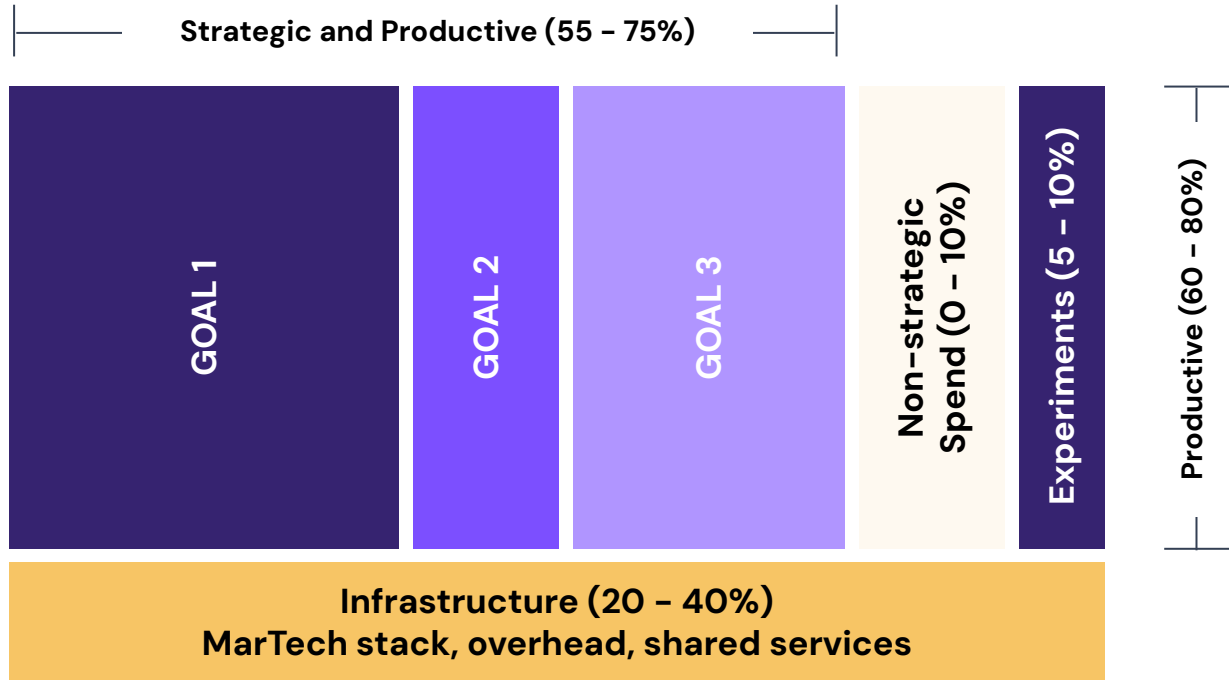
**Budget**  / **Number of pipeline**  = **Cost per pipeline**  [Calculate Budget](#)

See what budget is required to achieve

Set your target metric

# 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

# How to demonstrate the value of your plan

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*



Communicate value in  
financial terms...

## Financial terms



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

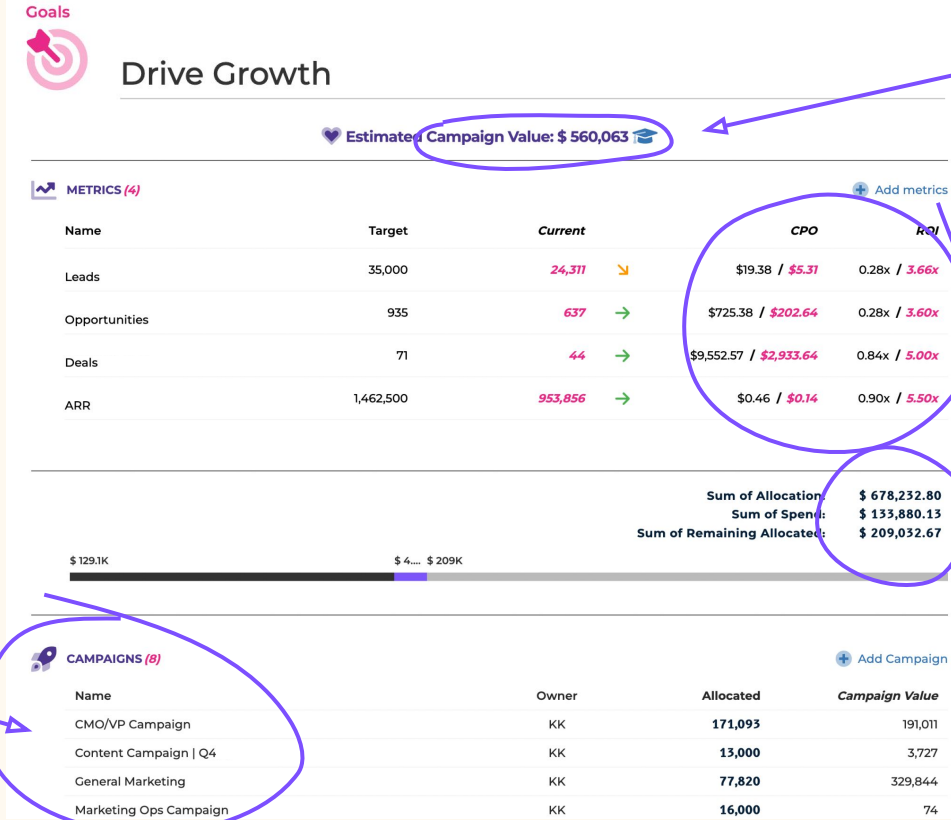
## Marketing speak



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

...not marketing terms

# How much are we spending to achieve our goals, and what is the implied cost per outcome and ROI?



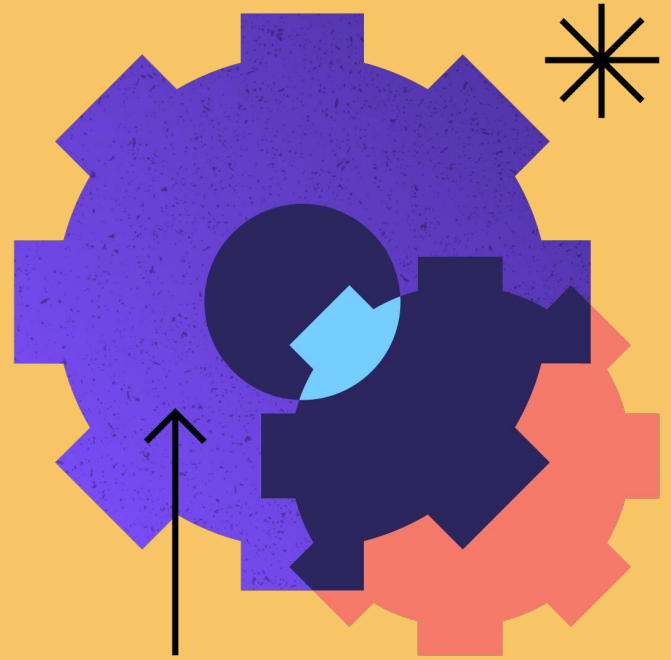
How much value am I creating?

Financially grounded metrics assessment

Current and planned spending

Which campaigns are contributing to performance?

# Tools That Can Help You



# Calculate your 2025 Marketing Budget

Figure out all your funnel metrics and the amount of marketing budget you need to achieve them – in 3 easy steps.

[funnel-builder.planful.com](https://funnel-builder.planful.com)

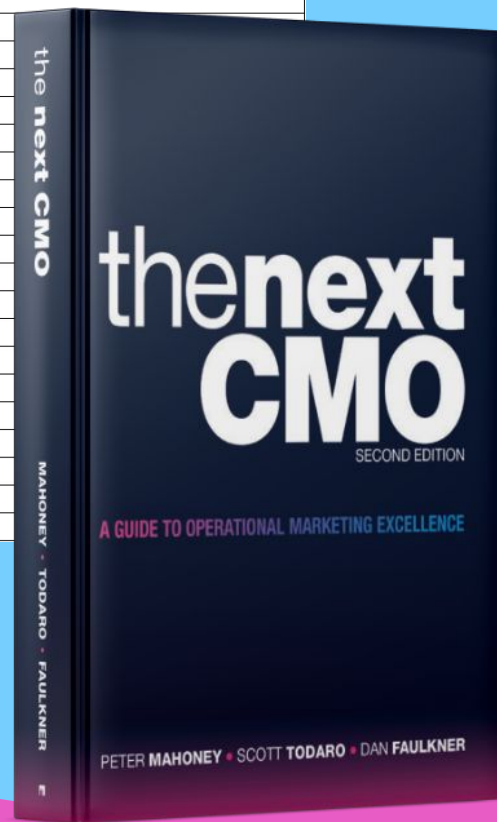


# The Next CMO: Second Edition

A Guide to Operational Marketing Excellence

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

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/exitfive](https://planful.com/exitfive)

The screenshot displays the Planful for Marketing interface. The top navigation bar includes 'Create', 'Manage', 'Dashboard', and 'History'. The main content area is divided into two panels. The left panel, titled 'Manage', shows a table of campaigns with columns for Name, Q1, and other metrics. The right panel, titled 'Manage', shows the details for the 'Boston Leadership Conference' campaign, including its start and end dates, target audience, campaign messaging, parent campaign, segment, owner, campaign type, and tags.

Name	Q1		
Drive Growth	0.00	0	0
Leadership Conference Series	0.00	0	0
Boston Leadership Conference	0.00	0	0
Booth Expenses	0.00	0	0
Sponsorships	0.00	0	0
Travel	0.00	0	0
Paris Leadership Conference	0.00	0	0
San Francisco Leadership Conference	0.00	0	0
Product Launch	0.00	0	0
Martech Stack	0.00	0	0
Grand Total	0.00	0	0

**Planful for Marketing**

planful **Create** Manage Dashboard History

**Manage** Manage Cancel Save & Close

**Manage**

Segment Goal Campaign Expenses

Create... Actions

**Details** Allocation Spending Performance

Start Date \* End Date \*

Q3 Q4

Target Audience

Campaign Messaging

Parent

Leadership Conference Series

Segment Demand Gen - NA Owner Bridges Smith

Campaign Type Event | Digital Campaign ID C-01234567

Tags Digital Emails

All Expenses 156 Grand Total USD 441,245,678.67 Expenses 90

# Planful

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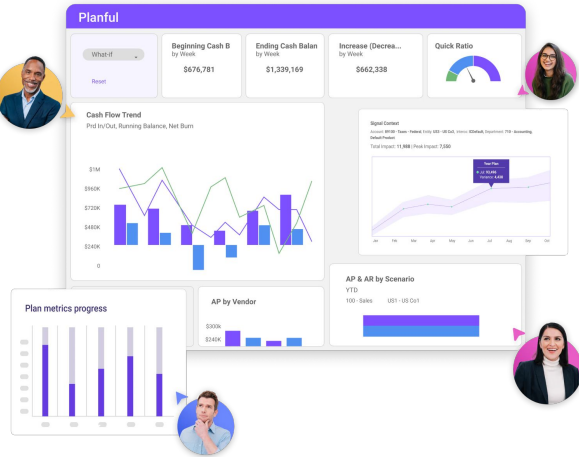
[planful.com/exitfive](https://planful.com/exitfive)

The screenshot displays the Planful for Marketing interface. At the top, there's a purple header with the title "Planful for Marketing". Below it, a navigation bar includes "planful" logo, "Create", "Manage", and various utility icons like a calendar and refresh. A search bar and "Planful for Marketing Demo" are on the right. The main area is titled "Manage" and has tabs for "Allocation" and "Spending". Below these are filter options: "Includes 'Planned' in 'Total Expenses'", "Expenses as a Total", and "Formula". A "Classic View" button is also present. The central part of the interface is a table with columns: Name, Perf., Budget, Closed, Committed, and Total Remaining. The table lists several campaigns with their respective budget and spending data. At the bottom, a summary bar shows: Segments 13/13, Goals 4/4, Campaigns 45/45, Expense Groups 9/9, Allocated \$ 7,732,031.56, Expenses \$ 5,630,549.35, and Remaining Child Allocations = \$ 1,188,248.11 Available \$ 913,234.10.

Name	Perf.	Budget	Closed	Committed	Total Remaining
APAC Growth and Expansion	↑	1,063,054.40	1,044,824.83	825.06	17,404.51
Content Campaign		14,586.44	100.00	687.58	13,798.86
Customer Appreciation Campaign	↑	11,200.00	100.00	10,000.00	1,100.00
Customer Upgrade Campaign	→	20,313.59	2,055.40	1,518.73	16,739.46
Developer Awareness - Banner Ads		117,000.06	61,000.00	8,000.00	48,000.06
Double Down in the Americas	→	2,687,966.90	1,858,159.33	70,680.21	759,127.36
EMEA Growth and Expansion	↑	1,309,050.00	1,082,600.00	150,100.00	76,350.00



# Questions?



Rowan Tonkin &  
Dave Gerhardt

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