

Annual Inbound Marketing Plan Template

[Your Company Name]

[Year]

[Your Company Logo]

INTRODUCTION

Hey there, fellow marketer! Here's why and how to use this annual marketing plan template:

- Because you have a lot going on
- You're using an inbound marketing strategy, right? If so, that will help because then you have target personas, a buyer journey, competitive advantage and other "background" information to guide you.
- If you're curious what should be in your guiding inbound marketing strategy, check out [this article](#). Your strategy should be a "playbook" of sorts that you'd put together as part of your foundational inbound marketing program and revisit at least annually as part of your planning process to ensure it's still current. Think of it as the "why" behind your tactical plans.

What's in this template?

I'm glad you asked. Here are the sections we've laid out for you to work in. This is an editable document, so feel free to adapt it to your company's needs. The sections and examples we've provided are meant to give you an efficient framework to create your own annual inbound marketing plan. In order to do that, we recommend including the following:

- **Executive Summary — Business and Marketing Performance Review**
- **S.M.A.R.T. Business & Marketing Goals for the Coming Year**
- **Marketing Key Performance Indicators (KPIs)**
- **High-Level Marketing Initiatives & Plan Components**
- **Budget Allocation**
- **Measuring & Reporting Progress Throughout the Year**





1. Executive Summary — Business and Marketing Performance Review

Start by reviewing the current year’s business performance and marketing performance, and identify key takeaways that will affect your marketing efforts going forward.

Business Performance Review:

Report on the state of key business growth/profitability measures for the current year versus the prior year, such as: new business generated (number of customers and revenue), gross revenue, gross profit, gross margin, net profit before taxes, and units/pounds/parts sold.

Marketing Performance Review:

Review the results your current marketing efforts have generated based on your current year marketing goals and KPIs. Below, summarize what you’ve learned, creating buckets to identify which efforts you should **continue** (and perhaps double down on), which you should **stop**, and which you should **start** doing.

CURRENT TACTIC	GENERAL RESULTS / EFFECTIVENESS OF TACTIC	CONTINUE	STOP	START DOING
Ex: Business Blog	50% of leads originated through blog/organic search	Increase frequency and organize around topic clusters for more SEO power		

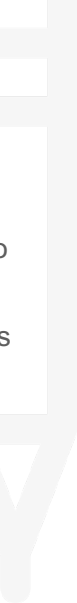


2. Business & Marketing Goals for [Year]

Goals, objectives and key performance indicators (KPIs) are a declaration of where you want your business to go in the coming year. In filling out this section of your plan, list S.M.A.R.T. **business** goals (Specific, Measurable, Attainable, Relevant and Time-bound) for the coming year. Then list S.M.A.R.T. **marketing** goals that align with (will help you achieve) the business goals.

When you've done that, you can move onto KPIs. These are the marketing and sales performance indicators that you'll track throughout the year to monitor the progress of your plan, and give you data that will help you determine focus areas in your Quarterly Roadmaps.

SPECIFIC BUSINESS GOAL	HOW WILL WE MEASURE IT?	IS THE GOAL ATTAINABLE?	IS THE GOAL RELEVANT TO MY BUSINESS?	BY WHEN DO WE WANT TO ACHIEVE THE GOAL?
Ex: Close \$2M in revenue from new customers	closed sales	yes - this represents an 11% increase over last year; this year was a 9% increase over the prior year	yes	End of year



SPECIFIC MARKETING GOAL	HOW WILL WE MEASURE IT?	IS THE GOAL ATTAINABLE?	IS THE GOAL RELEVANT TO MY BUSINESS?	BY WHEN DO WE WANT TO ACHIEVE THE GOAL?
Ex: Based on average customer worth in 1st year, close 2 per quarter	closed sales	yes - in prior year we closed 7 new customers year	yes	End of year

MARKETING KPIs
Ex: In order to close 2 new customers per quarter, we need to generate 5,000 website visits, 30 Marketing Qualified Leads and 10 Sales Qualified Leads per month

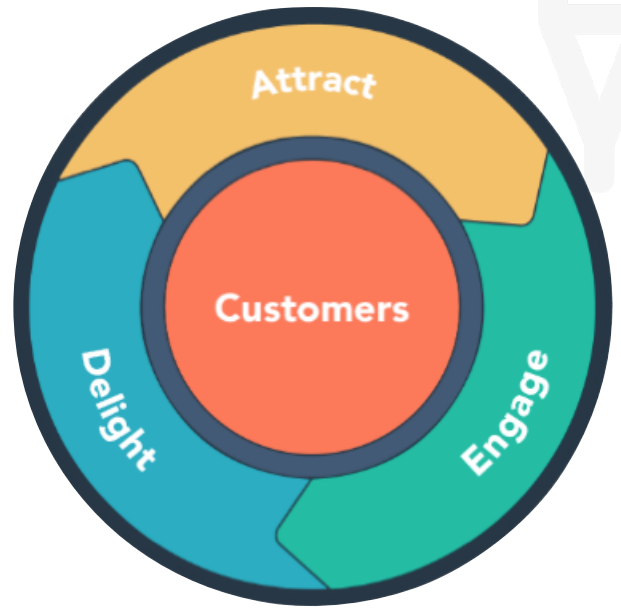


3. Key Initiatives & Plan Components

Use this section of the marketing plan to outline known business and marketing initiatives you'll undertake to reach your business goals. For instance if there's an annual trade show you sponsor or host, or one of your business goals is to launch a new product — those initiatives should be noted because marketing will need to support them.

EXERCISE: USING THE FLYWHEEL TO IDENTIFY & PRIORITIZE OPPORTUNITIES

In order to prioritize your marketing initiatives, use the [Flywheel](#) concept to attack the growth gap and identify opportunities at the different stages in your marketing, sales, and customer service. At each stage of the flywheel (Attract, Engage and Delight), identify the forces and the friction. Forces are effective tactics and are helping you grow, and Friction are things that are weighing you down. Think about these in terms of what's working for/against you to: Attract prospects, Engage them in the sales process, ultimately Delight them as customers so that they then become promoters who help you Attract more customers.



Flywheel

STAGE	FORCE	FRICION
ATTRACT	Ex: We increased our blogging to twice weekly and have seen a 32% spike in visits from social and organic search	We don't have enough downloadable content offers and therefore few opportunities for visitors to convert to known leads/prospects
ENGAGE		
DELIGHT		



KEY COMPONENTS

This section should identify your high-level efforts; remember, with [Quarterly Roadmaps](#), you're able to use data generated by your website and marketing automation software to make informed decisions about what you want to modify going forward to ensure your tactics perform at their highest levels.

We've included some of the most common components of an annual inbound marketing plan to get you started — add, edit, and remove based on your company's goals and initiatives for the coming year.

CONTENT STRATEGY

Generally, what types of content will you continue to produce (blogs, videos, advanced content)? Do you need to create new content to support an upcoming product launch, to enter a new market or for newly identified personas? If there's a gap in the information your prospects need to make a purchase decision, you should be creating content to address it.

NEED	CONTENT TYPE(S)
Ex: Support launch of new product by building awareness and educational content	Create a campaign with blog articles, social content, email messages and explainer videos



SEO STRATEGY

Consider a topic cluster approach to your website, creating [pillar pages](#) (sometimes called focus pages) that offer a vast amount of information and act as sort of mini wikis on a subject. You'll also need to consider earned media, a great source of SEO juice. These are trade pubs, backlinks from other websites, and public relations.

WHAT'S OUR SEO STRATEGY FOR THE COMING YEAR?

Ex: Create pillar pages out of existing content and optimize them around keywords used by manufacturers in need of a contractor with CCC certification

GROWTH DRIVEN WEBSITE DESIGN (GDD)

Growth-driven design is a process of continuous website improvement, each modification informed by user data. [Read more about GDD here](#). If you plan to start GDD, list cadence of these sprints (4 weeks is typical).

HOW WILL WE RUN OUR GDD CYCLES?

Ex: Implement a GDD program for data-driven continuous website improvements to increase traffic and lead conversions. In order to execute all the things we need to do with our website, we will run 2-week sprint cycles



SOCIAL MEDIA STRATEGY

List the platforms you'll use to engage with prospects and promote your content, knowing that all platforms serve somewhat different audiences with different needs.

PLATFORM	FREQUENCY	CONTENT TYPES
Ex: LinkedIn	3x/week	2x/week blog + as needed cultural/recruiting content

TRADE SHOW SUPPORT

If you're exhibiting at an industry show next year, list the timeframe and summarize the inbound campaign components you'll develop to support these events. These could involve social media, PR, email, paid ads, webpage content, and downloadable content offers. Remember, you don't need to have every detail listed here — this would be a perfect focus area for a Quarterly Roadmap that the show falls into.

Ex: Develop a pre-show promotional campaign and an exclusive offer to encourage booth appointments

VOICE OF THE CUSTOMER

Chances are, as part of your Flywheel exercise, you identified opportunities to improve customer Delight. One of the best ways to improve is to ask for [customer feedback](#) and Net Promoter Scores, and then systematize that feedback so you can act on it to improve customer service and capture marketing wins. Use the space below to outline a process for using feedback to turn customers into your biggest promoters.

Ex: We will implement a VoC program by using HubSpot Service tools to create NPS and customer feedback surveys.



4. Budget

What's your inbound marketing budget? And what will you assign to the different initiatives above?

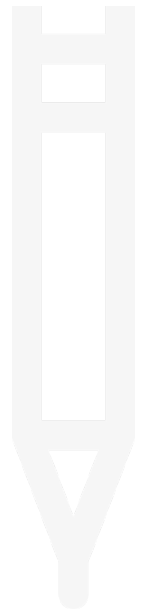
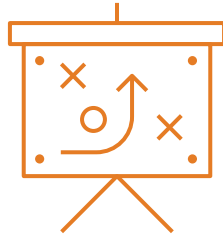
INITIATIVE	BUDGET ALLOTTED
Ex: PaperCon trade show sponsorship and inbound campaign development	

5. Measuring & Reporting Progress

How will you track performance against the marketing goals and KPIs during the year? What tools will you use to share this with sales and leadership so you're aligned? If you're creating Quarterly Roadmaps, analyzing and reporting is part of the cadence for creating the next quarter's roadmap — your focus areas for the upcoming 90 days are based on what's working, and what's not, so that your tactics and channels can flex accordingly — but you should also have real-time dashboards to look at.

HOW WILL YOU REPORT ON PROGRESS TOWARD GOALS AND TRACK KPIs?
Ex: We will set up Databox dashboards for real-time access to marketing KPIs and will provide quarterly reports on goal progress as part of our roadmap planning process





Need More Help Putting Together Your Inbound Marketing Plan?

We love helping companies in complex industries execute inbound strategies to help align their marketing and sales teams and grow their business better. [Reach out for a free consultation today.](#)

If you haven't already, we also highly recommend subscribing to our [blog](#) where we frequently publish the latest best practices in inbound marketing, sales and growth. You can also follow us on [LinkedIn](#), [Twitter](#), and [Facebook](#).

Oh, and you can delete this page from your own company's plan.

