

01 / COMMERCIAL FOCUS

90-Day Marketing Planning Worksheet

Build a focused B2B plan that your team can actually run. Use this workbook to connect buyer needs, a clear offer, realistic resources and a weekly learning rhythm.

HOW TO USE THIS WORKBOOK

Complete it with marketing and sales. Begin with one priority audience and one primary offer. Use your own baselines; label estimates. Set review dates before work begins. This is a planning tool, not a forecast or a promise of results.

Planning period / business owner / marketing owner / sales owner

Priority buyer: role, company type, market and buying situation

Problem worth solving now / trigger / likely objection

Offer: what is available, for whom, and what is the next step?

HYPOTHETICAL EXAMPLE

A component manufacturer targets engineering managers evaluating a new supplier. The offer is a technical suitability conversation supported by a specification guide. The first test asks whether application-specific content produces enquiries with usable requirements. This is an illustrative scenario, not a client case study.

02 / OUTCOMES

Choose goals you can measure

Separate business outcomes from the indicators marketing can influence. Use a consistent definition, source and period for each baseline. Write “unknown” where data is missing.

Metric / definition	Baseline + period	90-day target	Source / owner
Sales-accepted leads			
Qualified opportunities			
Relevant enquiries			
Key conversion rate			

Define before you count

A useful rate includes both numerator and denominator. For example: relevant enquiries divided by eligible landing-page sessions, with the same period and exclusions for both.

Primary outcome and why it matters to the business

Constraints: sales capacity, production limits, seasonality or buying cycle

Baseline gaps: what must be measured, by whom and by when?

INTERPRETING THE NUMBERS

A 90-day plan may produce early buying signals before revenue appears. Record the expected sales-cycle length and review opportunities by creation date. Do not treat all form fills as qualified leads or attribute every sale to the last click.

03 / CHANNEL CHOICES

Turn channels into hypotheses

Choose a small number of tests you can resource. Each channel needs a buyer rationale, an offer, a destination and a decision rule. Start with evidence you already have.

Candidate channel	Why this buyer is here	Offer / destination	Owner
Search / useful content			
Paid search / social			
Email / existing audience			
Partner / direct outreach			

Priority test: if we do what, for which buyer, what signal should change?

Evidence needed / minimum test period or sample / stop or revise rule

HYPOTHETICAL TEST

If procurement buyers search for material compatibility, publish one focused guide with a related enquiry path. Review query relevance, engaged visits and enquiry quality. A small sample supports a directional judgement, not a confident causal claim. Set the observation window before starting.

What will we deliberately not do this quarter?

04 / EXECUTION

Give every week a job

Work backward from your constraints. The phases below are suggested checkpoints; fill in the actual deliverable and owner. Use dates rather than “next week” when you commit the plan.

Week / phase	Deliverable / owner / due date	Review or dependency
1 / Align		
2 / Baseline		
3 / Prepare offer		
4 / Launch test		
5 / Inspect quality		
6 / Adjust		
7 / Build next asset		
8 / Test variation		
9 / Sales review		
10 / Reallocate		
11 / Validate		
12 / Document		
13 / Decide next cycle		

Weekly review day / attendees / decision-maker

WEEKLY REVIEW: FOUR QUESTIONS

What shipped? What did buyers do? What did sales learn? What changes next week? Keep a brief decision log. Assign one accountable owner to every deliverable and record blockers before they become missed dates.

05 / CREATIVE LEARNING

Test a useful difference

Write a test card before producing more creative. Change one major variable where practical, keep the comparison fair and decide what evidence would justify the next step.

Test card	Your plan
Buyer / stage / offer	
Question or hypothesis	
Control / current version	
Variant / one main change	
Audience / placement / dates	
Primary metric / guardrail	
Decision rule / owner	

Creative brief: message, proof, call to action and required asset

Result / sample size / caveats / next decision

HYPOTHETICAL EXAMPLE

Compare a capability-led message with an application-led message for the same offer and audience. Look beyond clicks: did the variant attract relevant enquiries? If distribution or sample size is uneven, record the uncertainty and avoid declaring a winner too early.

Before release

- ☐ Check claims, image rights, landing-page consistency, mobile display and tracking.
- ☐ Confirm the internal approver and approval date before publishing or spending.

06 / RESOURCES

Allocate a real budget

Use the currency your team approves. Separate media spend from production, tools and internal effort. All amounts below are deliberately blank; enter your own approved limits.

Currency / 90-day budget cap / budget approver / approval date

Cost category	Planned amount	Actual amount	Owner / notes
Paid media			
Content / design / video			
Website / landing pages			
Tools / data / distribution			
Other external costs			
Contingency / unallocated			
TOTAL			

Internal capacity: person / hours per week / key dependency

Reallocation rule: evidence needed, approval required and review date

COST DISCIPLINE

Check whether estimates include taxes, platform fees, production and recurring commitments. Track media cost per sales-accepted lead separately from fully loaded cost. If the denominator is zero, report “no accepted leads yet” rather than a misleading efficiency figure.

07 / SALES AND MEASUREMENT

Close the feedback loop

A marketing plan becomes more useful when sales can explain what happened after the enquiry. Agree on lead definitions, response ownership and a simple reporting rhythm.

Handoff rule	Agreed definition / owner
Relevant enquiry	
Sales-accepted lead	
Qualified opportunity	
Response owner / backup	
Response target / escalation	
Rejection reasons / feedback	

Measurement essentials

- ☐ Use consistent campaign names and tagged links where supported; record the destination and owner.
- ☐ Test conversion events and CRM source fields before launch; document consent limitations.
- ☐ Review leads for duplicates, spam and relevance; use the same exclusions every week.
- ☐ Track source, lead stage and dates using only necessary information with appropriate access.

Weekly report: source / dashboard owner / review day / decisions recorded

Day 90 review: continue, change or stop? Evidence and next owner

TAKE THE PLAN INTO THE ROOM

Bring the completed worksheet, baseline evidence and the biggest unresolved question to your planning discussion. Agree the next action and its owner before adding more channels or increasing the budget.