


# B2B SAAS MARKETING PLAN TEMPLATE

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# #1 Business Overview & Vision

## Company History

- *How did the business start?*
- *Briefly describe when, where, and why the company was founded.*
- *What are the key milestones in your company's development?*
- *List any major achievements, product launches, or growth moments.*

## Vision Statement

- *Summarize your ultimate goal or aspiration as a business.*

## Mission Statement

- *Describe your core purpose and what you aim to deliver for your customers.*

# #1 Business Overview & Vision

## Product/Service Overview

- *What product or service do you offer?*
- *Briefly describe your main product(s) or service(s) and what makes them unique.*

## Target Market

- *Who is your target market?*
- *Define your primary customer segments, industries, or geographies.*

## Headquarters & Locations

- *Where is your company headquartered?*
- *Provide your main office address and any additional locations if relevant.*

# #1 Business Overview & Vision

## SWOT Anaylsis

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**

## #2 Objectives & KPIs

This section helps you define clear, measurable objectives and the key performance indicators (KPIs) that will track your progress. Setting the right goals and KPIs ensures your B2B SaaS marketing plan is focused, actionable, and aligned with business growth.

### Business & Marketing Objectives

- *What are your business objectives, and how will your marketing objectives support them? You can list 4-5 goals, one goal per line.*
- *Make each goal SMART (Specific, Measurable, Attainable, Relevant, Timebound).*

## #2 Objectives & KPIs

### Current State

- *Current Customers:*
- *Current ARR / MRR:*
- *Current Lead-to-Customer Conversion Rate:*
- *Current Website Conversion Rate:*

### Future Targets

- *How many customers would you like to have in 12 months?*
- *What is your 12-month target ARR and MRR?*

### Funnel Calculation

- *How many leads do you require to achieve your new customer goal?*
- *If your website conversion rate remains static, how much traffic do you need to hit your lead and customer targets?*

## #3 Market & Customer Analysis

This section helps you deeply understand your target market, customer segments, and the external environment. A clear market and customer analysis ensures your B2B SaaS marketing plan is grounded in real opportunities and tailored to the needs of your ideal buyers.

### Market Overview

What is the size of your target market?

What trends are shaping your industry?

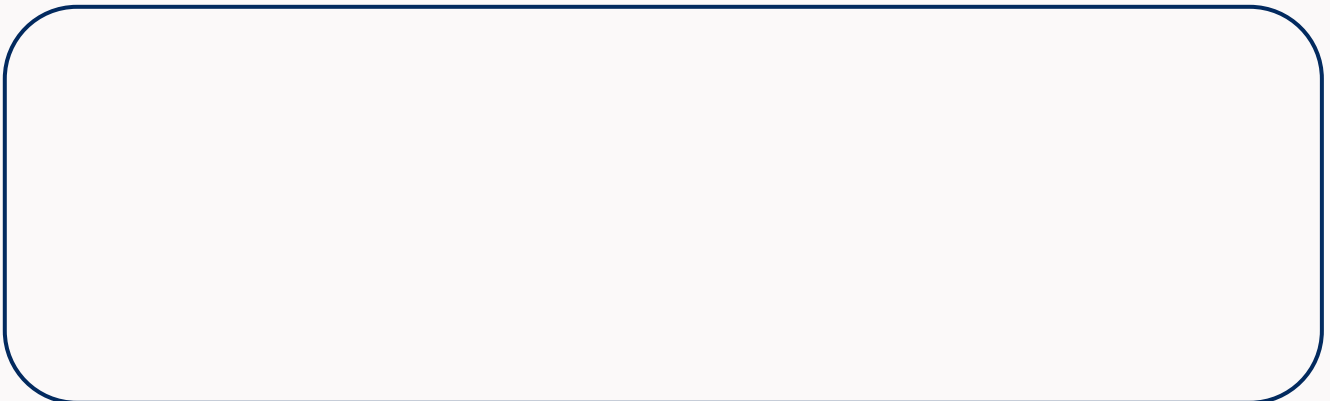
Who are the main competitors in your space?

## #3 Market & Customer Analysis

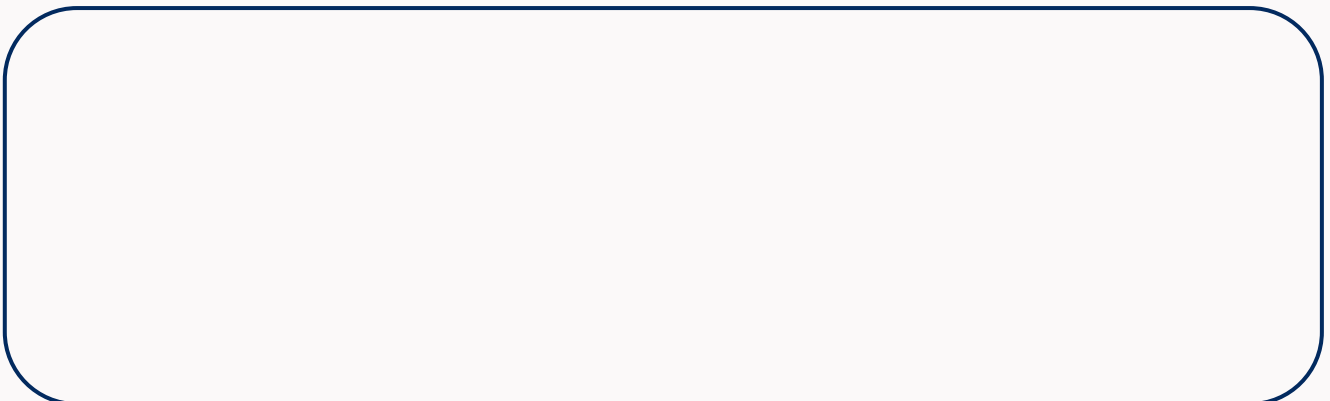
**Who is your ideal customer?**

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**What are their main pain points?**

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**Who are the key decision-makers and influencers?**

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## #3 Market & Customer Analysis

Segment Name	Description & Needs	Decision Maker	% Revenue

# #4 Product Overview & Market Positioning

This section highlights your product’s core features, key benefits, and unique strengths, clearly showing how it stands out from competitors and why customers should choose it.

Main Feature	Key Benefit	Technology/Platform

## #4 Product Overview & Market Positioning

**Highlight USP (Unique Selling Proposition)**

**Which segment does your product serve?**

**Who are your target customers?**

# #4 Product Overview & Market Positioning

Why should customers choose you over competitors?

Fill in the criteria and compare each product side by side to quickly see the standout advantages

Criteria	Your Product	Competitor A	Competitor B
Name			

# #5 Brand Messaging & Content Strategy

Define your brand’s core message and content plan—clarify what you stand for and how you’ll reach your audience with the right topics and channels.

## Brand Promise & Core Message

*Brand Promise:*

*Tagline/Slogan:*

What are your brand values?	
Values	Description

# #5 Brand Messaging & Content Strategy

## What are your main content themes?

*List 3–5 core topics that your content will consistently focus on:*

## Which formats will you use?

*Specify the key content types you'll produce (e.g., blog posts, videos, infographics, case studies, webinars):*

## Where will you publish and promote your content?

*Identify the main channels for sharing your content:*

# #5 Brand Messaging & Content Strategy

Content Calendar Template

Month	Content Topic	Format	Channel	Owner

*Use this calendar to plan your content topics, formats, channels, and responsibilities for each period. Adjust as needed to match your marketing goals and team capacity.*

## #6 Marketing Mix & Channels

**What are your main marketing channels?**

*List all channels you plan to use:*

Channel	Main Objective	Key Tactics/Activities	Owner
Website			
SEO			
LinkedIn			
Email			
PPC			



## #6 Marketing Mix & Channels

Channel	Priority	Estimated Budget (%)
Website		
SEO		
LinkedIn		
Email		
PPC		

*Rank channels by priority (High, Medium, Low) based on expected impact.*

# #7 Marketing Plan

Marketing Plan					
Time Period	Channel/Activity	Objective	Key Actions	Owner	Deadline

## *Instructions:*

- *Fill in each marketing activity by month or quarter.*
- *Specify the objective, owner, and deadline for each activity.*

# #7 Marketing Plan

Time Period	Channel/Activity	Objective	Key Actions	Owner	Deadline

# #7 Marketing Plan

## Marketing Plan Worksheet

Responsibility Table

Activity	Owner	Support/Collaborators	Deadline

# #7 Marketing Plan

## Marketing Plan Activities and Deadlines

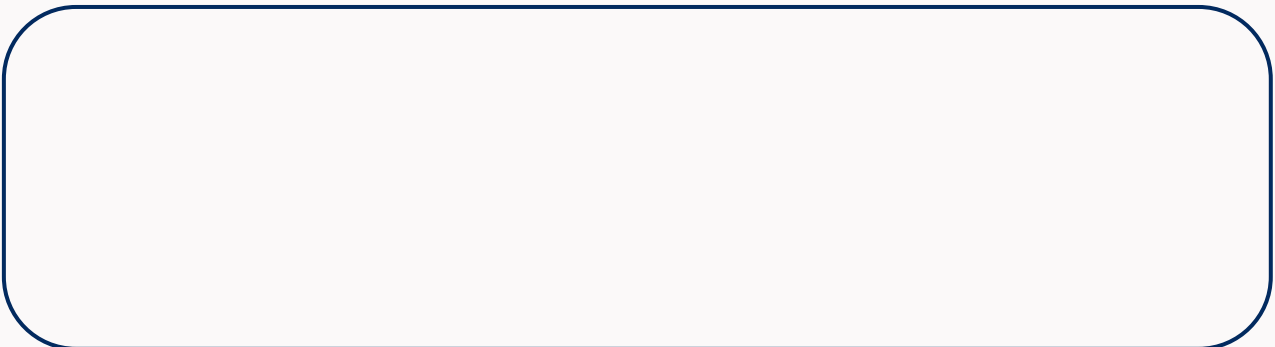
Activity	Owner	Support/Collaborators	Deadline

## #7 Marketing Plan

**What new business results do you expect if your objectives are achieved?**

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**What is your expected return on investment (ROI) from this marketing plan?**

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**What budget and resources have you allocated to reach your goals?**

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