



Annual Planning Worksheet

Presented in Tandem With Business as “Un”Usual



What's Working?

What's contributing to our business's success?

Which campaigns and channels are generating our most sales qualified leads?

Which of our products or services are generating the most consistent revenue?

Which of our processes or technologies are most helpful?



What Opportunities and Concerns Are Keeping Us Up at Night?

What are our people most excited to make happen in the next year?

Which factors are going to have the biggest impact
on our business and our industry in the next year?

What are the internal and external barriers that
we're worried will prevent our company's growth?



What's Changed in the Marketplace?

Which new competitors, products, services, or technologies should we keep our eyes on over the next year?

What are our competitors doing differently that we wish we did first?

What do our customers and prospects tell us matters most to them?



How Are We Most Likely to Reach Our Audience?

How can we better understand what motivates our customers and how they move through their buying process?

Which of our buyer personas are up-to-date and which need to be revisited or created from scratch?

Which of our marketing communications channels have the highest and lowest engagement rates?

Which channels should we prioritize for the next year based on our available resources?



What's the Best way to Build a Long-term Plan for Reaching our Target Audience?

Which always relevant cornerstone topics should we build our marketing around for the next year?

Who is our audience? What buying decision do we want to help them make?
What outcome do we expect?

What questions should our customers be asking as they think about about our cornerstone topics?

Which assets do we already have that address these questions and which can we not currently answer?



What Defines Our Success?

What are the most important metrics we're measuring on a regular basis?

How can we qualify improvements that we can't easily measure?



Who Should Participate in the Annual Planning Process?

Vision Setting - Short /Long-Term Growth Plan

Senior Leadership/Executive Team

Grow-to-market Campaign and Channel Planning

Strategists/Market Research Team

Sales Leaders

Marketing Leaders

Human Resources

Web Ops Team

Plan Execution

Account Leaders

Marketing Team

Web Ops Team

Human Resources

Plan Performance - Quarterly/Bi-Annual Business Reviews

C-Suite

Account Leader

Sales Leader

Human Resources

Marketing

Web Ops



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