Gartner for Marketing

Your Must-Have Toolkit for Marketing Strategic Planning

Make sure your strategic plan clearly defines how your marketing function will drive enterprise success.

Strategic planning can be an arduous process, but certain activities will differentiate your plan as one that really drives impact.

These five steps are especially important. And think now about the tools you will use at each stage to capture and share key data and information with stakeholders:

1. **Verify the business context.** Confirm the enterprise mission and goals and make sure your service and support employees know how they apply to their everyday work. Align your marketing function's goals for impact.
2. **Assess your function's capabilities** to deliver on your goals and create a plan to fill the capability gaps that will slow your impact.
3. **Strategically manage functional** budgets to prioritize cost, budget and investment decisions to favor initiatives that will drive impact — and demote those that won't.
4. **Decide how to measure your progress.** Select measures and metrics that will demonstrate the progress you're making against the commitments you've made.
5. **Document your strategy —** ideally on just one page — to simply and clearly state where the functional organization is, where it is going and how it will get to the future state.

CMOs who plan out 18 months or more are

1.5x more likely

to report high marketing and business performance than those who do not.

Yet, only **15%** of CMOs plan beyond three years.

Source: Gartner

Tools and frameworks you'll need

1 Align with business strategy

- Strategic Alignment Template
- TPESTRE Trendspotting Framework
- Scenario Planning Framework
- Gartner CEO Survey Benchmarks

2 Assess your function

- Gartner Marketing Score

3 Strategically manage functional budgets

- Gartner Budget and Efficiency Benchmark
- Cost Optimization Framework
- Gartner BuySmart™ Tool

4 Measure your progress

- Gartner Hierarchy of Metrics Framework
- Cascading Metrics Template

5 Document your strategy

- One-Page Marketing Strategic Planning Template

1. Align with business strategy

Surface and verify the priorities of the enterprise and your business partners.

First, make sure you understand enterprise business goals well enough to craft a strategic plan for your marketing organization that will support enterprise ambitions.

Document both the business context and the likely impact on your function of factors:

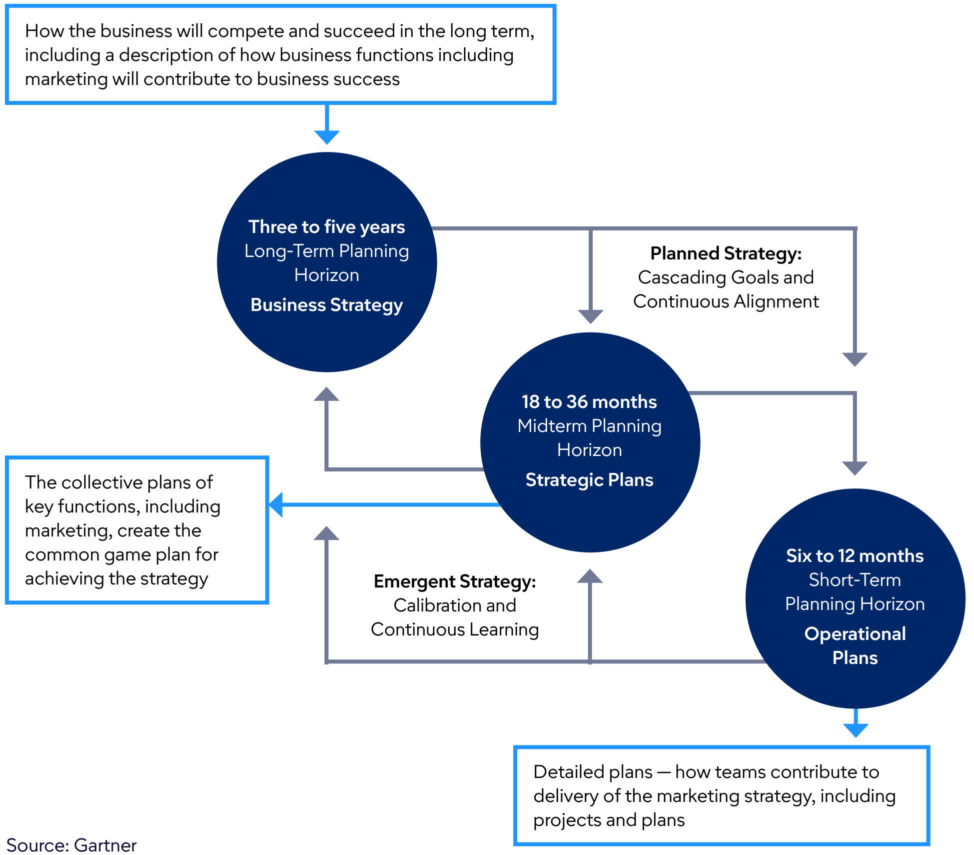
- **Within** your function
- **Internal** to the enterprise
- **External** to the enterprise

Key tools for this may include:

- A simple **conversation guide** to focus your conversations with business partners
- **Trendspotting** frameworks to look at drivers of change, including those in the more distant future
- **Scenario planning** activities to align business partners around your hypothetical futures

Don't forget: A productive relationship between functional leaders and the CFO will also be critical for effective strategic planning (see page 8 for more).

Business Strategy



Source: Gartner

1. Align with business strategy: Strategic alignment tool

Use this tool to guide your conversations with business partners:

Questions about that business partner's domain	Notes of your business partner's answer
What are your key business objectives and resultant goals for the next two to five years?	
What are your primary strategies? How do you plan to execute on these strategies?	
What is the direction of the key product line, supply chain, service offerings, etc.?	
How will you know if your unit is successful? What will you measure?	
What are the key success factors that will make or break your unit's success in the long term?	
What major obstacles will the business unit face in reaching these objectives?	

1. Align with business strategy: Trendspotting

Preparing for nascent trends is key to navigating disruption and capturing opportunity

No executive leader can predict the future, but you can adopt a deliberate approach to sensing and responding to trends.

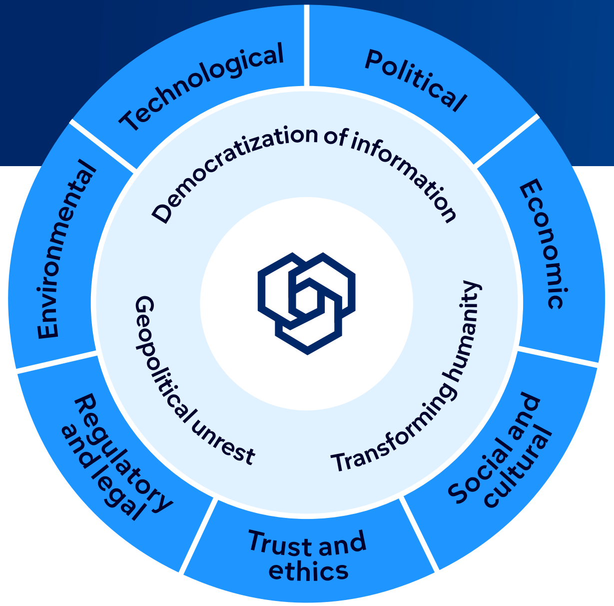
Use a construct like the Gartner TPESTRE of trends (at right) to prepare to respond to disruptions and plausible futures. Key considerations are your organization’s footprint (existing presence within a market or industry) and foothold (strategic opportunities to expand).

Footprint includes your:

- **Customer base:** established group of loyal customers
- **Operational facilities:** manufacturing plants, distribution centers, infrastructure or supply chains
- **Brand reputation:** market perception of your organization

Foothold includes:

- **Innovation and pilot projects:** testing new offerings with new emerging technologies
- **Partnerships** to gain market insights
- **Acquisitions** to establish a larger presence
- **Targeted marketing campaigns:** gauging interest in a new product or service in new markets



Forces and trends impacting your organization’s future

Technological: evolution, impact and disruption of technology change

Political: political attitudes, institutions and legislation shifting the political environment

Economic: factors in the economic environment locally and globally that influence businesses and governments

Social and cultural: attitudes, behaviors and lifestyles of individuals and groups in a society

Trust and ethics: ethical expectations, behaviors, duties and biases of people and companies toward one another and society

Regulatory and legal: changes in laws and governmental policies and regulations to reward or punish a particular behavior

Environmental: technical, political, economic, cultural, ethical and legal changes supporting environmental protection and sustainability

Source: Gartner

1. Align with business strategy: Prepare for scenario planning

Scenario planning can help business partners to align on their hypothetical futures

Good scenario planning requires you to first identify trends likely to create significant risks or opportunities.

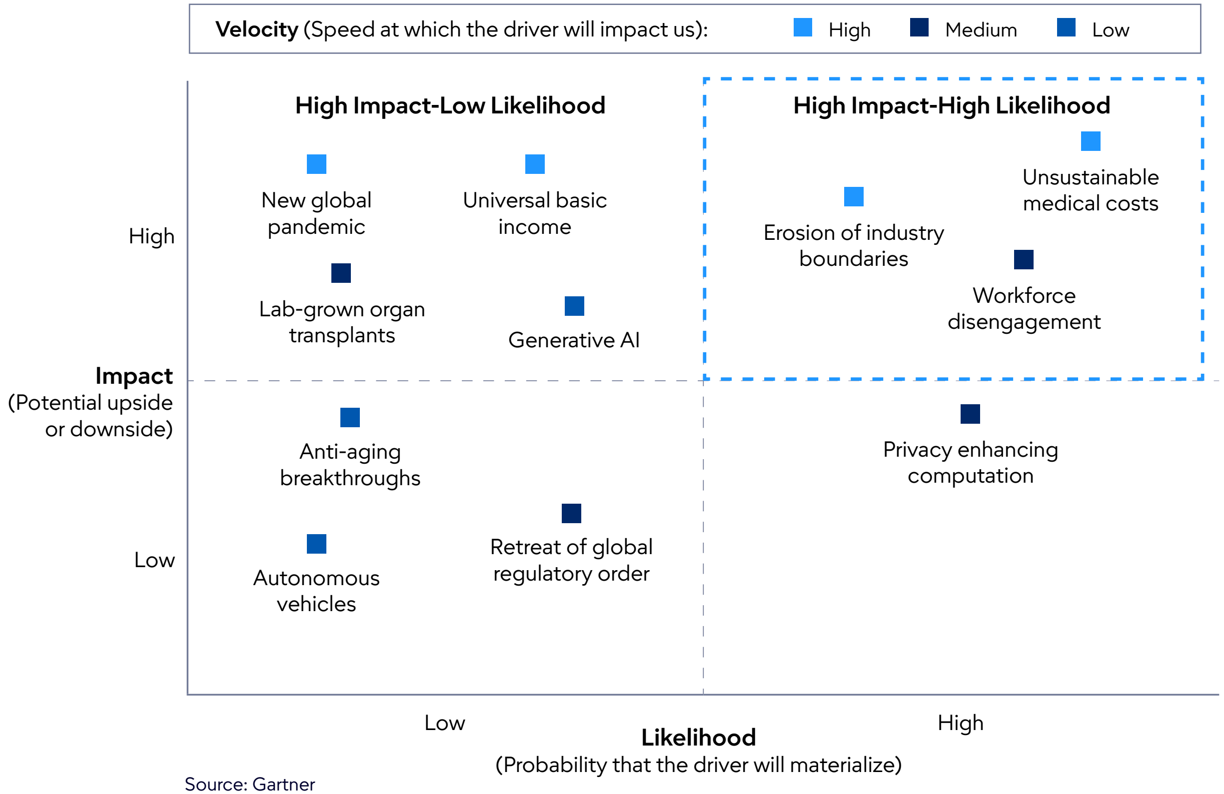
Make sure to:

- **Align** with a diverse set of business partners on the trends
- **Prioritize** the trends based on their relative importance (use a tool like this simple 2x2)

From here, categorize and relate trends together to develop scenarios. Develop a storyline for each scenario to test if it seems credible and feasible.

Strategic plans should include actions aligned to whichever scenarios you deem most pressing.

Prioritize actions based on the most material scenarios

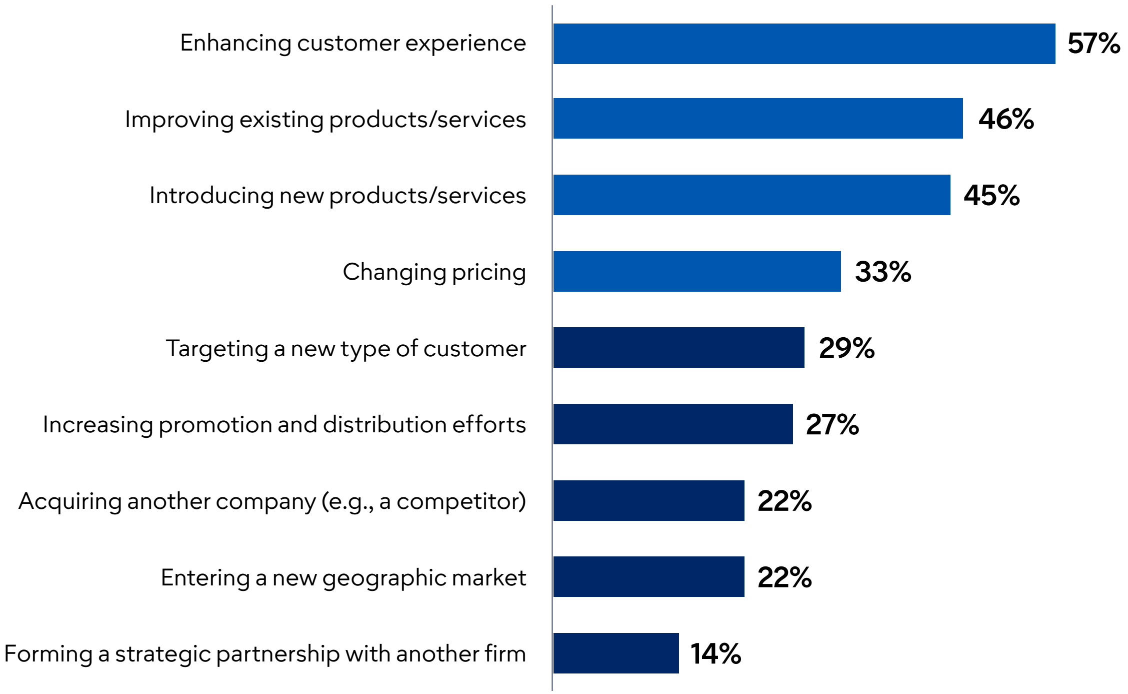


Source: Gartner

1. Align with business strategy: Build a productive CFO relationship

Overcome the C-suite expectation gap on marketing's impact

Top company growth strategies
Percentage ranked



n = 125 CEOs and CFOs
Q: What are your company's top 3 most important strategies to fuel growth for the next 3-5 years?
Source: Gartner

Only 34% of CEOs and CFOs are aligned with their CMOs about how marketing supports growth.

Growth is consistently the top priority for most CEOs and CFOs. CMOs tasked with driving growth need to go beyond a vague growth mandate and understand more specifically where and how senior executives expect marketing to drive growth (examples to the left).

To rebuild CEO and CFO confidence in marketing:

- Clarify marketing accountabilities and demonstrate the impact of marketing.
- Prioritize relationship-building efforts to improve authority and access.
- Draw clear connections to senior executive priorities with related marketing initiatives.
- Demonstrate strategic prowess and insight into future trends.

2. Assess your function's capabilities

Benchmark and determine how well-positioned your marketing function is to deliver on strategy.

To ensure optimal results from strategic efforts, it's critical to assess the role of your marketing function in the enterprise and how well it performs that role. As the enterprise strategy evolves, so will this assessment.

In your strategic planning cycle, make sure to undertake a capabilities assessment soon after verifying the business strategy so you can build a roadmap to improve your effectiveness.

Gartner Marketing Score, available for both B2B or B2C functions, enables you to build a data-backed roadmap to improve your effectiveness by measuring your:

- **Existing performance** across key objectives and activities typically within scope for your marketing function
- **Maturity** in different activities on a simple-to-understand scale so you can easily compare maturity in different activities and against best-practice levels
- **Criticality of activities** on a simple scale so you can focus on requisites for your marketing function to deliver its contribution to enterprise strategy

Gartner for Marketing Score

Generate Marketing Insights	Attract and Engage Customers	Activate Content and Channel Strategy	Manage Brand and Reputation	Manage Operations	Lead the Function
Manage Customer Data Assets	Identify & Prioritize Marketing Opportunities	Set Advertising Strategy and Media Mix	Determine Brand Architecture	Optimize Budget, Resources & Processes	Define Marketing Strategy
Generate Customer and Market Insight	Deliver Personalized Communications	Define and Manage Content Strategy	Develop Brand Strategies and Positioning	Manage Agencies & Vendor Partners	Design Marketing Organization
Define Segments, Personas & Journeys	Build Customer Loyalty	Enable Sales and Channel Partners	Activate the Brand	Manage & Develop Talent	Guide Innovation
Conduct Marketing Analytics	Identify & Support Brand Influencers	Create and Execute Multichannel Campaigns	Manage Company Reputation	Leverage Marketing Technology	Evaluate & Communicate Marketing Performance
Conduct Customer Performance Analytics	Manage Digital Commerce		Monitor Brand Health		Champion a Customer-centric Culture

Source: Gartner

→ Learn More

3. Strategically manage functional budgets

CMOs face an era of doing more with less budget.

The Gartner CMO Spend Survey found that marketing budgets hold at 7.7% of company revenue for a second consecutive year. However, half of CMOs reported budgets of 6% or less.

Flat growth is both good news and bad news for CMOs. The good news is that the postpandemic budget decline has halted, but the bad news is that marketing spending has stabilized at a rate that CMOs had already complained was insufficient to meet the needs of their strategy.

CMOs will need a strategic mindset and tools to apply three best

1. **Reallocate funding** from low- to high-potential investments.
2. **Fund growth investments** using costs saved in less important activities.
3. **Use unallocated funds** for as-needed growth investment support.

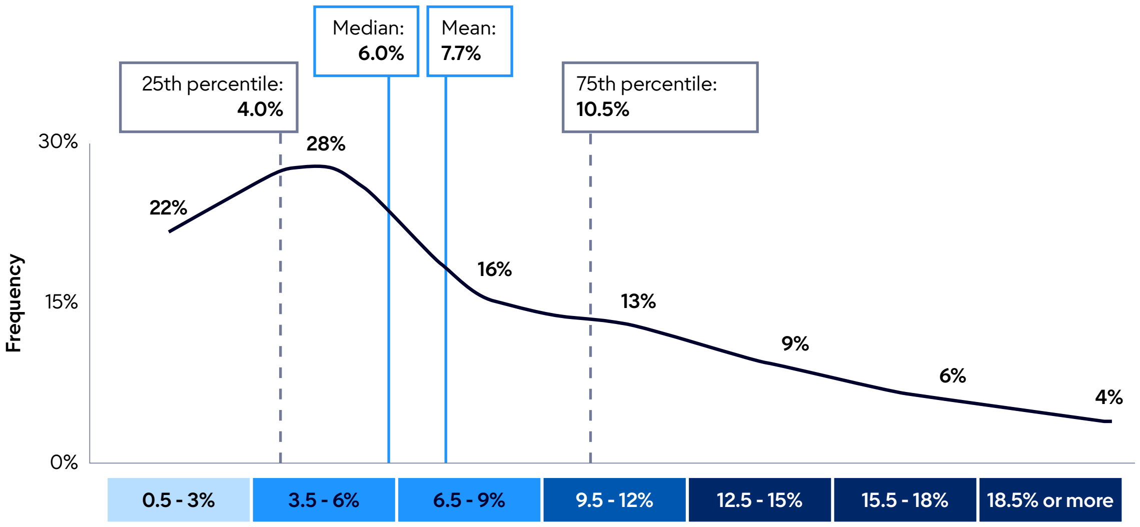
Technology is one area of spend where every functional leader will need better decision-making tools to select the right vendors and negotiate effectively to assure ROI.

Budget-conscious CMOs allocate **64% of their spend to digital channels** as a trusted source of ROI.

Source: Gartner

Marketing Budget as a Percent of Total Revenue 2026

Quartile analysis means shown



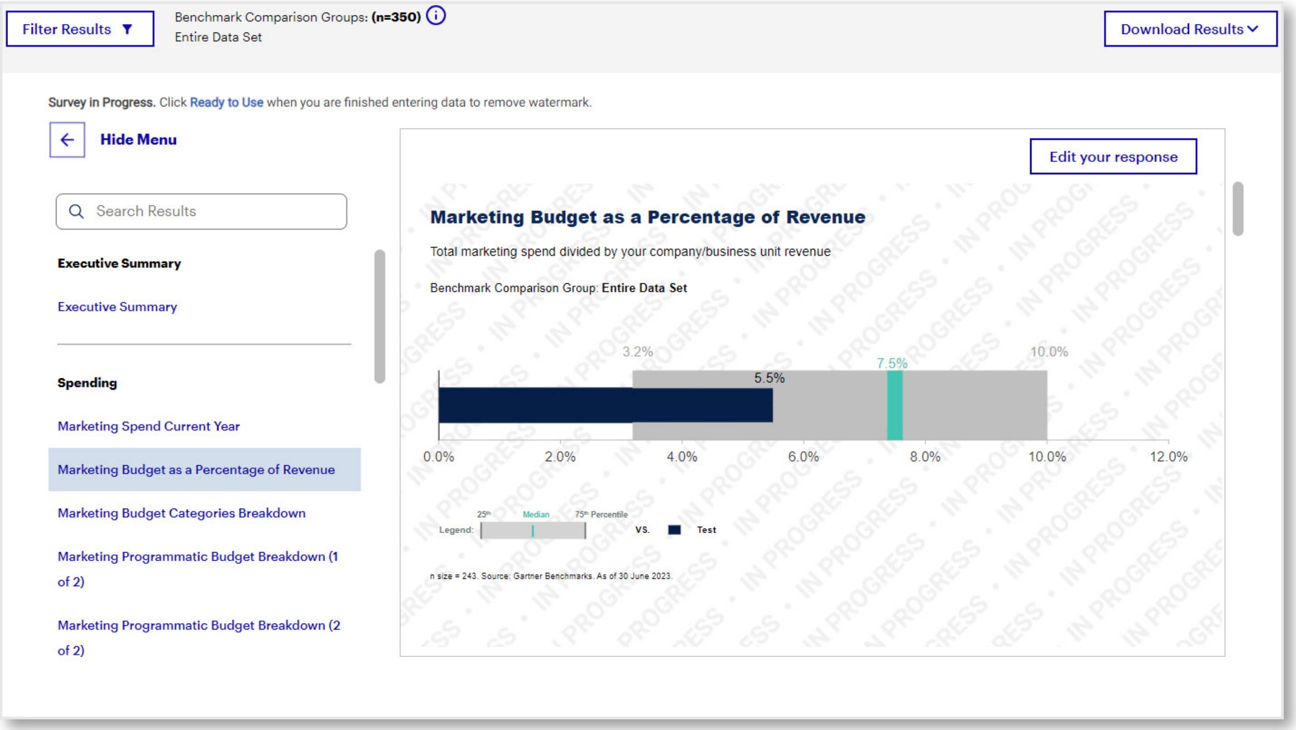
Q: What percentage of your revenue is being allocated to your total marketing expense budget in 2025?

Note: Percentage totals may not add to 100% due to rounding.

Source: Gartner

3. Strategically manage functional budgets: Budget efficiency benchmarking tool

Benchmark your marketing budget against peers



Did you know?

Gartner clients can use an interactive tool to benchmark their functional budget and efficiency.

3. Strategically manage functional budgets: Cost optimization framework

Align costs and investments with strategy and value

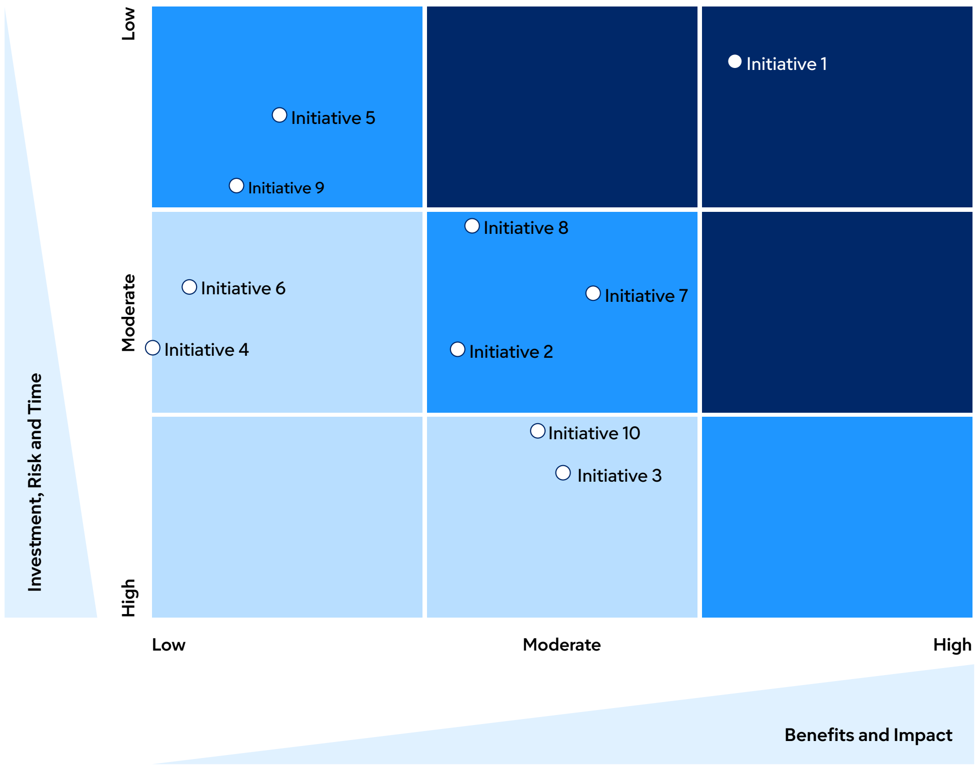
To optimize costs strategically and productively (rather than just cutting), you need to know what drives costs, which costs relate to differentiating capabilities (i.e., value drivers) and what are your returns on investment.

Strategic cost optimization rarely succeeds without three things:

1. Standardized cost management framework
2. Shared understanding of cost-to-value relationships
3. Consistent definition of success beyond cost saving

Use a structure like the Gartner Cost Optimization Framework to refine and visualize your cost optimization ideas by the level of benefit, cost, risk and viability so stakeholders have full visibility into the relative merits of deploying spend.

Map your cost optimization initiatives and visualization trade-offs



Source: Gartner

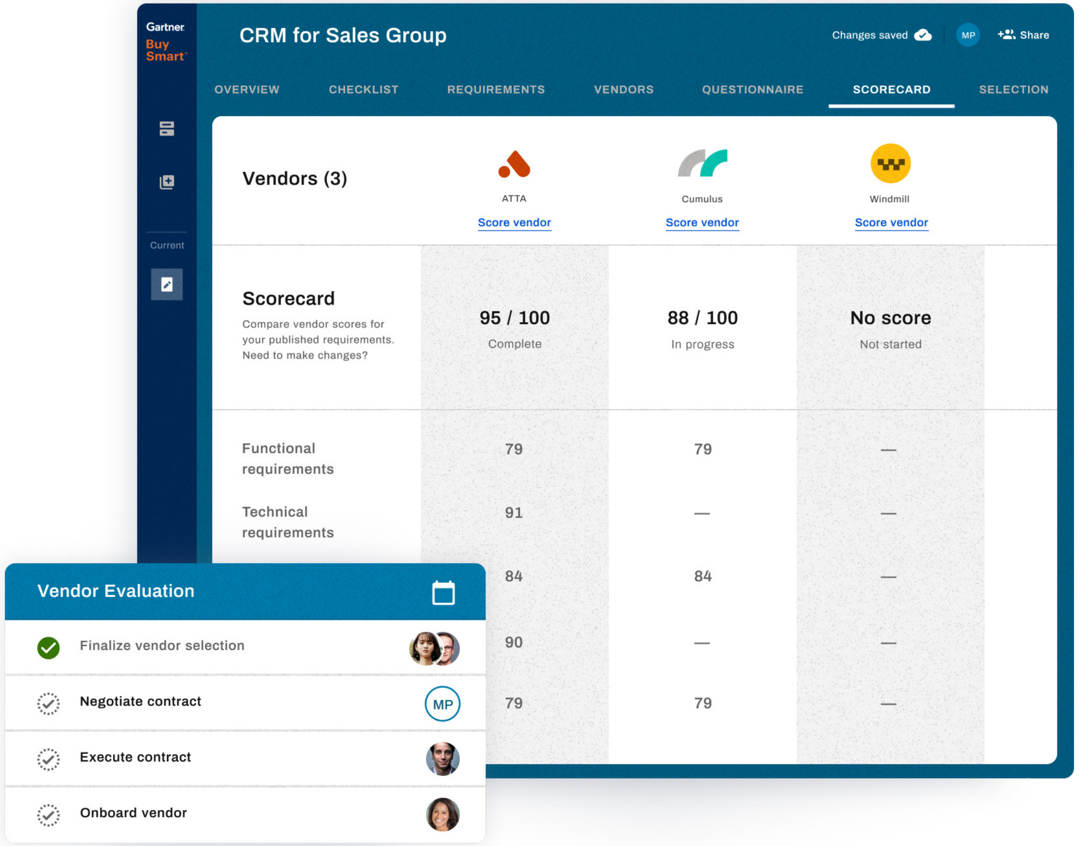
3. Strategically manage functional budgets: Gartner BuySmart™

Confidently manage the martech evaluation process

Use the Gartner BuySmart™ tool to get quick access to our proprietary analyst and peer insights and evaluation templates for a wide range of technology vendor solutions.

- **Discover** a wide range of possible technology vendor solutions, driven by proprietary analyst and peer insights and evaluation templates.
- **Evaluate** using requirements, questionnaires, scorecards and more, chosen by and visible to your whole team.
- **Select** vendors using your aggregated team scores to remove bias and clarify decisions.
- **Optimize** your spend and reduce risk with a Gartner analyst proposal review.

→ Learn More



4. Measure your progress

Identify metrics that will show if your plan is working.

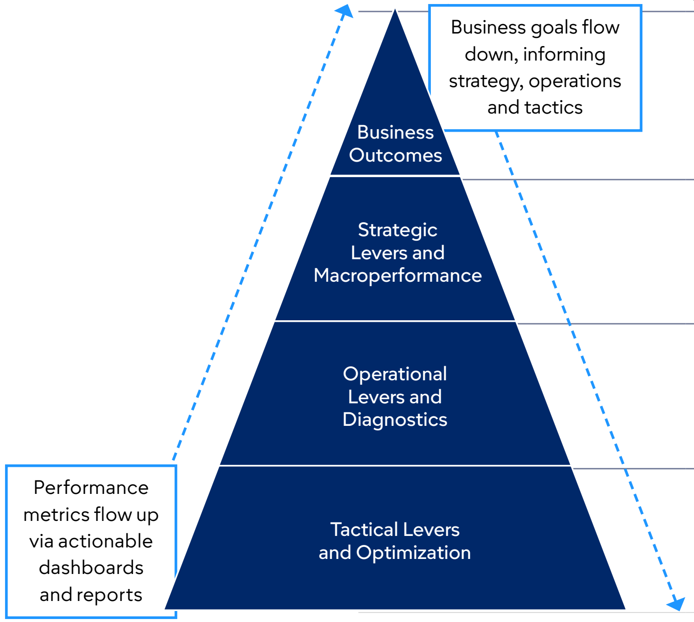
A one-size-fits-all approach will not work for marketing metrics because different levels of decisions require different insights.

Although metrics differ based on the granularity of the decisions they support, success still requires a clear and unambiguous link between the strategy, operational plans and tactical activities.

To choose meaningful metrics:

- Build consensus with senior stakeholders on marketing goals and reporting expectations.
- Form a team to define key metrics linked to operational goals and marketing strategy.
- Audit data quality and availability, start creating a metrics taxonomy.
- Identify and address gaps in data, find short- and long-term solutions.
- Select and refine key metrics, regularly update dashboards to maintain relevance.

The Gartner Hierarchy of Marketing Metrics



	Decisions Supported	Roles Supported	Granularity	Frequency
Business Outcomes	Business Strategy	CEO, CMO and CFO	Low	Monthly
Strategic Levers and Macroperformance	Marketing Strategy	CMO	Low	Monthly
Operational Levers and Diagnostics	Marketing Planning and Campaigns	Marketing Management	Medium	Weekly
Tactical Levers and Optimization	Campaign and Content Optimization	Campaign Managers, Analysts and Specialists	High	Daily

Source: Gartner

4. Measures and metrics: Guide to cascading metrics

Metrics provide the means to show whether your action plans are achieving your goals

Goal 1

Expand presence in the North American market

Objectives

Objective 1	Leverage AI to expand our footprint in the clothing industry
Objective 2	

Metric 1	Metric 2
Market share of clothing industry	
Target	**Target**
7% increase in market share by end of 2026	

Goal 2

Objectives

Objective 1	
Objective 2	

Metric 1	Metric 2
Target	**Target**

Goal 3

Objectives

Objective 1	
Objective 2	

Metric 1	Metric 2
Target	**Target**

5. Document your strategy

Provide a single-page overview to simply and clearly communicate your strategic plan.

Your strategic plan defines the roadmap of initiatives and portfolio of investments your marketing organization intends to pursue to execute on its commitment to drive business strategy.

Putting your marketing plan on a single page makes it easier for you to share, summarize and communicate — and easier for business partners to visualize and understand.

One-page templates are meant to provide a summary of your strategic roadmap, not to serve as the overall strategic plan.

Make sure yours contains the initiatives identified as a part of the overall strategic planning process for your function.

See the next page for a simplified view of a Gartner one-page plan (and use the fillable template for your planning), but note that different functions and organizations will need to customize their view, its component parts and level of detail.

Did you know?

Gartner clients can submit documents for review by experts who can assess and provide feedback and input for your strategy template.

5. Strategic planning templates

Fillable template to outline your own strategic plan on a page

Type in the fields below to complete the interactive form

Vision statement

Statement of strategy

Current state

4 to 7 key metrics characterizing your current state

Plan

4 to 7 initiatives required to achieve the target end state

4 to 7 assumptions that must be true for the plan to succeed

Future state

4 to 7 key metrics characterizing your target state

Actionable, objective insights

Explore these additional complimentary resources and tools for marketing leaders:

Tool

Gartner AI Use Case Insights for CMOs

Explore, evaluate, and prioritize 1,000+ proven AI use cases and real-world examples tailored to your industry.

Get Started

Tool

Gartner Digital IQ Index

Benchmark your brand's digital performance against industry competitors to prioritize investments and maintain relevance across channels.

Get Started

Already a client?
Get access to even more resources in your client portal. Log In ↗

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