

# MARKETING DOSSIER

PREPARED BY: \_\_\_\_\_  
DATE: \_\_\_\_\_



## 1 The Project (Long Term Goal)

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### The Mission (6-18 Month Goal)

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.....  
.....

### Objectives

1. ....  
2. ....  
3. ....  
4. ....  
5. ....

## 2 Key Results (This Quarter Only)

OBJECTIVE: 1 2 3 4 5

A. ....  
B. ....  
C. ....

OBJECTIVE: 1 2 3 4 5

A. ....  
B. ....  
C. ....

OBJECTIVE: 1 2 3 4 5

A. ....  
B. ....  
C. ....

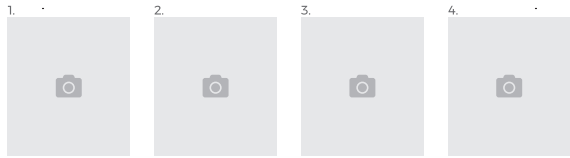
## 12 Marketing Tactics

|                    |           |            |             |      |           |
|--------------------|-----------|------------|-------------|------|-----------|
| Mkt. Understanding | Awareness | Connection | Opportunity | Sale | Retention |
|--------------------|-----------|------------|-------------|------|-----------|

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|  |  |  |  |  |  |
|--|--|--|--|--|--|
| PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C | PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C | PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C | PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C | PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C | PERSONAS: 1 2 3 4<br>OBJECTIVE: 1 2 3 4 5<br>KEY RESULT: A A A A A<br>B B B B B<br>C C C C C |
|--|--|--|--|--|--|

## 4 Personas



Their "Pain": .....  
Their "Pain": .....  
Their "Pain": .....  
Their "Pain": .....

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## 5 Buying Role

|   |   |   |   |
|---|---|---|---|
| <input type="checkbox"/> DECISION MKR.<br><input type="checkbox"/> INFLUENCER<br><input type="radio"/> PARTIAL AUTH.<br><input type="radio"/> VETO POWER<br><input type="radio"/> INSIDE CLOUT<br><input type="radio"/> OUTSIDE CLOUT<br><input type="checkbox"/> USER<br><input type="radio"/> DEFINE REQS.<br><input type="radio"/> PROVIDE INPUT | <input type="checkbox"/> DECISION MKR.<br><input type="checkbox"/> INFLUENCER<br><input type="radio"/> PARTIAL AUTH.<br><input type="radio"/> VETO POWER<br><input type="radio"/> INSIDE CLOUT<br><input type="radio"/> OUTSIDE CLOUT<br><input type="checkbox"/> USER<br><input type="radio"/> DEFINE REQS.<br><input type="radio"/> PROVIDE INPUT | <input type="checkbox"/> DECISION MKR.<br><input type="checkbox"/> INFLUENCER<br><input type="radio"/> PARTIAL AUTH.<br><input type="radio"/> VETO POWER<br><input type="radio"/> INSIDE CLOUT<br><input type="radio"/> OUTSIDE CLOUT<br><input type="checkbox"/> USER<br><input type="radio"/> DEFINE REQS.<br><input type="radio"/> PROVIDE INPUT | <input type="checkbox"/> DECISION MKR.<br><input type="checkbox"/> INFLUENCER<br><input type="radio"/> PARTIAL AUTH.<br><input type="radio"/> VETO POWER<br><input type="radio"/> INSIDE CLOUT<br><input type="radio"/> OUTSIDE CLOUT<br><input type="checkbox"/> USER<br><input type="radio"/> DEFINE REQS.<br><input type="radio"/> PROVIDE INPUT |
|---|---|---|---|

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## 8 Primary Messaging Theme

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## 3 Leadership Roles

Executive Lead .....  
Administrative Lead .....  
Financial Lead .....  
Mkt Research Lead .....  
Creative Lead .....  
Reporting Lead .....  
Sales Expert .....  
Product Expert .....

## 6 Customer Value

|                    |                |
|--------------------|----------------|
| LTV                | CAC            |
| .....              | .....          |
| Marketing Overhead | Sales Overhead |
| .....              | .....          |

## 7 Marketing/Sales Budget

Acquisition Target (specify units, i.e., contracts, clients, seats, subscriptions, etc.)  
.....  
.....  
.....  
Target LTV:CAC      Total Budget  
.....  
.....

## 9 Sales Process Focus

|  |  |  |  |
|--|--|--|--|
| <input type="checkbox"/> UNDERSTANDING<br><input type="checkbox"/> AWARENESS<br><input type="checkbox"/> CONNECTION<br><input type="checkbox"/> OPPORTUNITY<br><input type="checkbox"/> SALE<br><input type="checkbox"/> RETENTION | <input type="checkbox"/> UNDERSTANDING<br><input type="checkbox"/> AWARENESS<br><input type="checkbox"/> CONNECTION<br><input type="checkbox"/> OPPORTUNITY<br><input type="checkbox"/> SALE<br><input type="checkbox"/> RETENTION | <input type="checkbox"/> UNDERSTANDING<br><input type="checkbox"/> AWARENESS<br><input type="checkbox"/> CONNECTION<br><input type="checkbox"/> OPPORTUNITY<br><input type="checkbox"/> SALE<br><input type="checkbox"/> RETENTION | <input type="checkbox"/> UNDERSTANDING<br><input type="checkbox"/> AWARENESS<br><input type="checkbox"/> CONNECTION<br><input type="checkbox"/> OPPORTUNITY<br><input type="checkbox"/> SALE<br><input type="checkbox"/> RETENTION |
|--|--|--|--|

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## 10 How can we improve their experience?

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.....  
.....  
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## 11 What is needed to make a sale?

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.....  
.....

## 13 Measuring for Success

| Metric | How to Measure |
|--------|----------------|
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |
| .....  | .....          |

### Moving Forward

| Issue | Question | Priority            |
|-------|----------|---------------------|
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |
| ..... | .....    | RED / YELLOW / BLUE |

