

maas
a codesm company

The 2027 Logistics Company Marketing Plan Workbook

A fill-in-the-blanks marketing plan for B2B logistics: who sits on the shipper's buying committee, how to get on the shortlist before the RFP, and how to recruit and keep drivers. Work through the ten sections, then use the 12-month plan and weekly dashboard to build a pipeline that holds up through the freight cycle.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our logistics company marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for trucking carriers, freight brokers, 3PLs and warehousing companies. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

Where do you win loads today? Dense lanes, asset capacity, specialized equipment (reefer, flatbed, hazmat), cross-border capability, tracking and EDI or API integration, safety record, on-time and claims performance.

WEAKNESSES

Where do you lose bids or accounts? Customer concentration, no published case studies, no marketing owner, a thin website, slow quote response, driver turnover, sales that depend on one or two people.

OPPORTUNITIES

Nearshoring and cross-border lanes, shippers re-bidding as contract rates rise, niche verticals such as food, automotive and building materials, warehousing add-ons for existing accounts, AI answers where competitors are invisible.

THREATS

The freight cycle, rate pressure, USMCA and tariff changes, fraud and double brokering that erode trust in the market, insurance costs, rising driver cost per hire, a key account consolidating providers.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Shipping Manager

Tenders loads every day and gets blamed for every missed appointment.

Needs capacity that shows up, live tracking and a dispatcher who answers the phone. Judges providers on falloffs, communication and how exceptions are handled.

COMPANY AND FREIGHT PROFILE

LANES AND WEEKLY LOAD VOLUME

KPIS THEY ARE JUDGED ON

BIGGEST FRUSTRATION WITH CURRENT PROVIDERS

WHERE THEY LOOK FOR NEW CAPACITY

PROOF THAT EARNS A TRIAL LOAD

WHAT WOULD THIS PERSON NEED TO SEE TO GIVE US THREE TRIAL LOADS NEXT MONTH?

HOW DO WE MAKE THEIR JOB EASIER DURING AN EXCEPTION, NOT JUST ON A GOOD DAY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Procurement Lead

Runs the bid and rewards complete, on-time responses.

Owns the annual or quarterly RFP and the provider scorecard. Wants competitive rates, clean compliance documents, financial stability and data that is easy to compare.

BID CALENDAR AND RFP FORMAT

NUMBER OF LANES AND PROVIDERS IN THE BID

SCORECARD CRITERIA AND WEIGHTING

COMPLIANCE DOCUMENTS REQUIRED

INCUMBENT PROVIDERS

HOW AWARDS ARE DECIDED

WHEN DOES THIS COMPANY BUILD ITS INVITE LIST, AND HOW DO WE GET ON IT BEFORE THE BID OPENS?

WHAT IS MISSING FROM OUR BID PACKAGE THAT A STRONG COMPETITOR WOULD INCLUDE?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Supply Chain VP

Owns the network strategy and the risk.

Decides on new distribution centers, cross-border expansion, technology and provider strategy. Reads LinkedIn, trade press and peer conversations and wants a partner with a point of view who can grow with them.

STRATEGIC PRIORITIES FOR THE NEXT 12 MONTHS

NETWORK CHANGES PLANNED (NEW DCS, NEARSHORING)

TECHNOLOGY AND VISIBILITY REQUIREMENTS

RISK CONCERNS

TRUSTED INFORMATION SOURCES

WHO INFLUENCES THE DECISION

WHAT POINT OF VIEW CAN OUR LEADERS SHARE THAT THIS VP WOULD FORWARD TO THEIR TEAM?

WHICH OF THEIR EXPANSION PLANS COULD WE SUPPORT THAT THEIR CURRENT PROVIDERS CANNOT?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	MODES AND LANES SERVED	PUBLISHED PROOF (CASE STUDIES WITH NUMBERS)	AUTHORITY AND SAFETY INFORMATION SHOWN	TRACKING AND INTEGRATION CAPABILITIES	LINKEDIN AND CONTENT ACTIVITY	SEARCH VISIBILITY FOR SERVICE AND LANE TERMS
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For automotive and industrial shippers moving freight between Monterrey and the Midwest, Puente Norte Logistics (a fictional company) is the cross-border truckload carrier that keeps every load visible through the border handoff, because we run our own drivers, our own Laredo transfer yard and one tracking portal from pickup to delivery.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Add 12 new shipper accounts with at least $250,000 in annual freight each by December 31, 2027. Receive 20 RFP or bid invitations in 2027, up from 8, and win at least 25% of lanes bid. Engage 60 of 150 target accounts, with two or more contacts active, by September 30, 2027. For carriers, cut driver cost per hire by 15% and lift 90-day retention from 60% to 75% by year-end.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
Qualified quote requests					
Target accounts engaged					
Meetings booked					
Pipeline value added					
RFP invitations and submissions					
Driver applications and cost per hire					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Trigger	A service failure, new lane or facility, the annual bid cycle or a tariff change creates a need.	Account-based ads and email already running to the target list	
Research	Searches for capacity or a specialist and asks peers and AI assistants.	Lane and service pages, Google Search Ads, LinkedIn posts, AI answers, trade press	
Shortlist	Checks proof, authority and safety before reaching out.	Case studies with metrics, authority and safety information, references	
First contact	Sends an RFQ, asks for a spot quote or takes an intro call.	RFQ form routed to the CRM, 15-minute response target, sales call	
Trial loads	Tests you with a few loads or a pilot lane.	Dedicated contact, proactive tracking updates, a short trial recap	
RFP or bid	Compares rates, compliance and references across providers.	Bid library, complete and on-time submission, reference calls	
Onboarding	Sets you up in their systems and wants a smooth start.	Setup packet, EDI or API connection, insurance certificates, SOPs	
Performance	Scores you on on-time, claims and communication.	Scorecards, quarterly business reviews, exception reports	
Expansion	Considers giving you more lanes, modes or warehousing.	Lane proposals, capacity updates, warehousing and cross-border offers	
Advocacy	Decides whether to vouch for you.	Approved case study, reference program, LinkedIn mention	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Website with lane and service pages**	Proof and RFQ capture	2 to 4 new pages per month	$2,000 to $5,000 per month with SEO	
☐	**LinkedIn organic**	Leader and company visibility with procurement and operations	3 to 5 posts per week across leaders	Time	
☐	**LinkedIn Ads (account-based)**	Reach buying committees at target accounts	Always on to the account list	$2,000 to $8,000 per month	
☐	**Google Search Ads**	Capture active capacity, 3PL and warehousing searches	Always on, tight lane and service terms	$1,500 to $5,000 per month	
☐	**Account-based email and outbound**	Start conversations with target accounts	Weekly sequences	$200 to $800 per month in tools and data	
☐	**Case studies and RFP library**	Get shortlisted and win bids	1 case study per quarter, library updated quarterly	Production time	
☐	**Market update newsletter**	Stay on the shortlist between bids	Monthly	$100 to $400 per month tool	
☐	**Trade shows and associations**	Meet target accounts in person	2 to 4 events per year	$5,000 to $50,000 per event	
☐	**Load boards and freight platforms**	Capacity and spot freight for carriers and brokers	Daily	Subscription	
☐	**Driver recruiting**	Seat drivers and keep them past 90 days	Always on	Separate budget measured on cost per hire	
☐	**AI answers and directories**	Be named when buyers ask AI for a provider	Quarterly audit and fixes	Time	

SECTION 9 · CONTENT AND SOCIAL

Content framework

About 40% LinkedIn posts from leaders and the company page, 25% proof such as case studies and metrics, 20% website guides on lanes, services and compliance, and 15% video of the yard, equipment and drivers. Aim for three to five LinkedIn posts a week, one case study a quarter, two to four website pages a month and a monthly newsletter.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Lane guides	Website page plus LinkedIn post	1 to 2 per month	Laredo northbound: how a cross-border load moves, step by step
2. Case studies with lanes and metrics	Website case study and one-page PDF	Quarterly	How a food shipper cut late deliveries on Chicago to Atlanta, with the before and after numbers
3. Market updates	Newsletter and LinkedIn post	Monthly	What this month's rate and capacity data means for your next bid
4. Compliance explainers	Website guide	As rules change	The USMCA annual review: what shippers moving freight to Mexico should watch
5. RFP resources	Guide and checklist	Twice a year	What a complete carrier bid package includes, and what most bids leave out
6. Driver stories	Short video and photo post	Weekly	Meet the driver who has run our Dallas dedicated lane for eight years
7. Facility and equipment tours	Video	Monthly	A walk through our cross-dock at 6 a.m.
8. Leadership point of view	LinkedIn post or article from an executive	Weekly	Three signs the freight market is turning, and what we are telling customers

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
LinkedIn ads and account-based marketing	25%	Always on to the target account list		
Content, case studies and SEO	25%	Lane pages, proof and the RFP library		
Events and associations	15%	Two to four events chosen around target accounts		
Google Search Ads	12%	Service, lane and warehousing searches		
Email, outbound data and tools	8%	Sequences, contact data, newsletter		
CRM, analytics and website	8%	Account-level source tracking and reporting		
Contingency and tests	7%	New lanes, niche campaigns, a downturn floor		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] Broker status and registered name shown in all brokerage advertising (no carrier language if you do not run trucks)
- [ ] USDOT and MC numbers easy to find on the website
- [ ] Legal name or trade name and USDOT number on both sides of every power unit, legible from 50 feet
- [ ] CRM with account-level records, buying committee contacts and a required source field
- [ ] RFQ form routed to the CRM with a 15-minute response target
- [ ] Lane and service pages for your top 10 lanes and core modes
- [ ] Case study approval process and an updated RFP library
- [ ] LinkedIn company page and leader profiles completed and consistent
- [ ] Target account list of 100 to 200 companies loaded into ads and email tools
- [ ] CAN-SPAM compliant email setup: postal address, opt-out, 10-business-day removal
- [ ] TCPA consent language on shipper forms and driver applications
- [ ] Driver recruiting funnel with FCRA background check disclosures and EEOC-compliant ad copy

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Qualified quote requests				
Target accounts engaged				
Meetings booked				
Pipeline added				
RFP invitations and submissions				
Win rate by lane				
New-account revenue, trailing 90 days				
Driver cost per hire and 90-day retention				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	Finish sections 1 to 6, list top lanes and accounts, and run the proof and compliance audit.		☐
Month 2	Fix the website: RFQ routing, the first lane and service pages, authority information, and tracking in the CRM.		☐
Month 3	Build the target account list with buying committees, and start a LinkedIn cadence for two or three leaders.		☐
Month 4	Launch the account-based campaign on LinkedIn and email, and add Google Search Ads on service and lane terms.		☐
Month 5	Publish the first two case studies with lane metrics, and assemble the RFP library.		☐
Month 6	Mid-year review of pipeline by source. Audit the driver recruiting funnel and set cost per hire targets.		☐
Month 7	Launch a niche content series, such as cross-border lane guides, and the monthly market newsletter.		☐
Month 8	Plan fall events around target accounts and prepare meeting lists in advance.		☐
Month 9	Prepare for bid season: refresh the RFP library, references and service metrics by lane.		☐
Month 10	Run event follow-up sequences and push account-based campaigns to accounts with bids coming up.		☐
Month 11	Hold quarterly business reviews with top accounts and ask for case studies and references.		☐
Month 12	Annual review: pipeline and wins by source against the freight cycle, a downturn budget floor, and next year's goals.		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Cutting marketing at the bottom of the cycle

Keep proof, LinkedIn and account-based campaigns running so you are on the list when shippers re-bid.

- [ ] We do this today

02 Claims without numbers

Replace adjectives with on-time percentages, claims ratios and named lanes you can document.

- [ ] We do this today

03 A brokerage that looks like a carrier

Show broker status in all advertising and never describe trucks or a fleet you do not operate.

- [ ] We do this today

04 Answering every RFP from scratch

Build a bid library once and update it every quarter.

- [ ] We do this today

05 LinkedIn ads aimed at job titles instead of accounts

Target the accounts that fit your lanes first, then the people inside them.

- [ ] We do this today

06 Recruiting ads that overpromise

Advertise pay and home time you can document, and track 90-day retention by recruiting source.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Write the snapshot, three personas and positioning statement. List top 10 lanes, top 20 accounts and three ideal account profiles.
☐	**Week 2**	Pull on-time, claims and safety data, outline three case studies, and check the website, ads and trucks for MC, USDOT and broker-status rules.
☐	**Week 3**	Route the website RFQ form into the CRM with a 15-minute response target and publish the first three lane or service pages.
☐	**Week 4**	Build a target account list of 150 companies with buying committees mapped in the CRM.
☐	**Month 2**	Start a LinkedIn cadence for two or three leaders, launch the account-based campaign and add Google Search Ads.
☐	**Month 3**	Assemble the RFP library and send the first monthly market update newsletter.
☐	**Quarter 2**	Plan events around target accounts, audit the driver recruiting funnel and launch a niche content series.
☐	**Year 1**	Review pipeline by source against the freight cycle, keep what produced accounts and set a downturn budget floor.

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for trucking carriers, freight brokers, 3PLs and warehousing companies. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

trymaas.com/get-a-demo



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