

a codesm company

The 2027 SaaS and Tech Company Marketing Plan Workbook

A working plan for B2B tech teams whose buyers build their shortlist before they ever talk to sales. Fill in each section to set pipeline targets, choose your channels and build the dashboard you will review every week.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our saas and tech 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 small and mid-sized B2B software and tech companies with a sales-led or hybrid product-led motion. 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 today? Think time to value, a niche you serve better than horizontal platforms, integrations, support, security posture, or a founder with a real audience.

WEAKNESSES

Where do you lose deals? Think thin review count, no SOC 2 report, no self-serve trial, pricing nobody can find, few customer stories, or slow follow-up on demo requests.

OPPORTUNITIES

What is opening up? Think competitor price increases, a legacy tool being sunset, new compliance requirements, partner marketplaces, and buyers asking AI tools for alternatives.

THREATS

What could take deals away? Think a platform bundling your feature for free, AI-native entrants, longer approval cycles, budget cuts, and AI assistants recommending a competitor.

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 Budget Owner

Owns the problem and the money, and has the final say.

A VP or director of operations, finance or the affected department who weighs cost, risk and payback. Rarely fills out your form first, but reads the business case, peer reviews and comparisons before signing.

JOB TITLE AND DEPARTMENT

COMPANY SIZE AND INDUSTRY

BUSINESS GOAL THIS YEAR

WHAT TRIGGERS THE SEARCH

TOP THREE OBJECTIONS

PROOF NEEDED TO APPROVE

WHAT WOULD MAKE THIS PURCHASE FEEL LIKE A CAREER RISK TO THEM?

WHAT NUMBER IN THE BUSINESS CASE WILL THEY CHECK FIRST?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Champion

The daily user who finds you first and sells you internally.

A manager or team lead who feels the pain every week and usually discovers you through search, an AI assistant or a peer. Wins or loses the deal in meetings you are not invited to.

JOB TITLE AND TEAM SIZE

DAILY WORKFLOW AND TOOLS

WHERE THEY RESEARCH

COMMUNITIES AND PEERS THEY TRUST

WHAT THEY NEED TO SELL INTERNALLY

SUCCESS METRIC THEY REPORT ON

WHAT DOES THE CHAMPION NEED TO FORWARD TO THEIR BOSS AFTER THE FIRST DEMO?

WHICH COMPETITOR OR WORKAROUND ARE THEY USING TODAY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Technical Gatekeeper

Joins late, reviews security and integrations, and can veto.

An IT, security or engineering lead who checks SSO, APIs, data handling and compliance documentation. Does not want to be sold to and judges you on how fast you answer the questionnaire.

ROLE AND REPORTING LINE

SECURITY AND COMPLIANCE REQUIREMENTS

SYSTEMS YOU MUST INTEGRATE WITH

DOCUMENTS THEY REQUEST

TYPICAL REVIEW TIMELINE

PAST VENDOR PROBLEMS

WHICH SECURITY OR INTEGRATION QUESTION MOST OFTEN STALLS YOUR DEALS?

CAN THEY FIND YOUR SECURITY DOCUMENTATION WITHOUT ASKING SALES?

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	G2 RATING AND REVIEW COUNT	PRICING MODEL AND ENTRY PRICE	PRIMARY SEGMENT AND ICP	TOP INTEGRATIONS	MAIN HOMEPAGE CLAIM	HOW AI ASSISTANTS DESCRIBE THEM
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 operations leaders at 50- to 500-person field service companies, Routewise is the scheduling platform that cuts dispatch time without replacing the ERP they already run, because it syncs both ways with NetSuite, Acumatica and QuickBooks and goes live in under two weeks.*

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. Create $4.8M in marketing-sourced pipeline by December 31, 2027, up from $3.1M in 2026. Raise MQL-to-SQL conversion from 14% to 22% by the end of Q3 by rewriting the MQL definition with sales. Bring blended CAC payback from 19 months to 15 months by Q4. Grow G2 reviews from 38 to 120, adding at least 10 a month, and be named in AI answers for 40% of 50 tracked buyer prompts by Q4.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
MQLs and SQLs by source					
MQL-to-SQL conversion rate					
Pipeline created by source ($)					
Median speed to lead (minutes)					
Demo show rate					
New G2 and Capterra reviews					

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	Something changes: a new hire, a failed audit, a tool being sunset, a growth spurt.	LinkedIn posts, peer conversations, newsletters	
Problem research	Tries to name the problem and see how others solve it.	Google, AI chatbots, communities, problem explainer content	
Solution research	Looks at categories and options, asks for the best tools for their situation.	Category pages, best-of answers in AI tools, comparison posts	
Shortlist	Narrows to three to five vendors and checks what peers say.	G2 and Capterra, alternatives pages, peer referrals	
First contact	Requests a demo, starts a trial or opens chat, expecting a fast answer.	Demo form, trial signup, chat, scheduling link	
Evaluation	Tests fit with real data and brings in colleagues.	Tailored demo, trial onboarding, proof of concept	
Business case and security review	Builds the case for the budget owner and clears IT and security.	ROI calculator, security page and documents, customer references	
Close	Negotiates terms and signs.	Proposal, contract, kickoff plan	
Onboarding	Wants first value quickly and judges you on it.	Onboarding emails, success calls, help center	
Expansion and advocacy	Adds seats or products and tells peers if it worked.	Review requests, case studies, referral program, user community	

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 and conversion paths**	Home base for every channel: pricing, demo, trial, security page	Monthly conversion test	$2,000 to $6,000 per month	
☐	**SEO, comparison, alternatives and integration pages**	Capture research-phase buyers and feed AI answers	4 to 8 pages per month	$3,000 to $10,000 per month	
☐	**AI search visibility**	Get named and cited in ChatGPT, Gemini, Perplexity and AI Overviews	Monthly prompt tracking	Included with SEO, plus $300 to $1,000 per month in tools	
☐	**Review sites (G2, Capterra, TrustRadius)**	Validate the shortlist	Always-on review requests	Free profile; paid tiers vary	
☐	**Google Ads**	Brand, competitor and high-intent category terms	Always-on	$3,000 to $15,000 per month	
☐	**LinkedIn Ads**	Reach buying committees and retarget site visitors	Always-on	$3,000 to $15,000 per month	
☐	**LinkedIn organic**	Create demand through company, founder and expert posts	3 to 5 posts per week across people	Time	
☐	**Email nurture and newsletter**	Stay present across a long buying cycle	Biweekly newsletter plus triggered sequences	$100 to $800 per month tool	
☐	**Webinars**	Educate and accelerate active deals	Monthly or quarterly	$500 to $5,000 per event	
☐	**Partner and integration marketing**	Co-marketing, marketplace listings and co-selling	One campaign per top partner per quarter	Time plus partner funds	
☐	**Product launches**	Turn releases into pipeline	Quarterly, tiered by importance	Time plus paid promotion	
☐	**Trade shows and field events**	Meet the buying group in person	2 to 4 per year	$5,000 to $50,000 per show	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Each month, publish one cornerstone piece and four to eight bottom-of-funnel pages, post three to five times a week on LinkedIn across your company page and two or three people, and send a biweekly newsletter. Keep explainers and comparisons ungated so buyers and AI tools can read them.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Problem explainers	Blog post or guide	2 per month	Why dispatch schedules break at 40 technicians, and the three fixes that work
2. Comparison and alternatives pages	Landing page	2 per month	Routewise vs an all-in-one field service suite: which fits a 120-person HVAC company
3. Integration pages	Landing page	1 to 2 per month	How the NetSuite sync works, field by field, and how long setup takes
4. Customer stories	Case study plus 60-second video	1 per month	How a regional plumbing company cut dispatch time without changing its ERP
5. Original data	Report or benchmark page	1 per quarter	What 2 million anonymized jobs say about the best time to schedule follow-ups
6. Launches and changelog	Release post, email, in-app message	Per release, tiered	New: route changes now update customer ETAs automatically
7. Expert point of view	LinkedIn post or short video	Weekly	What our customers stopped doing in 2026 and why
8. Demos and how-to video	2- to 5-minute video	2 per month	Build a week of routes in four minutes

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	25%	Buying-committee targeting, retargeting and thought-leader ads		
Google Ads	20%	Brand, competitor and high-intent category terms		
SEO, comparison pages and AI visibility	20%	Writers, page builds and prompt tracking		
Content production	12%	Video, design and customer stories		
Martech	8%	CRM, automation, consent and tracking tools		
Reviews, partners and events	10%	Review program, partner co-marketing and webinars		
Testing reserve	5%	Held back to double down on what works mid-quarter		

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

- [ ] CRM with original source and latest source fields on every contact and deal
- [ ] Written MQL and SQL definitions agreed with sales
- [ ] Required How did you hear about us field on demo and trial forms
- [ ] UTM naming convention used on every paid and partner link
- [ ] GA4 with demo, trial and pricing-page conversion events
- [ ] Google Ads and LinkedIn Insight Tag with offline conversion import from the CRM
- [ ] Consent management platform with Google Consent Mode for EEA and UK visitors
- [ ] Marketing automation with lead scoring and nurture sequences
- [ ] Demo scheduling with instant routing to cut speed to lead
- [ ] G2 and Capterra profiles claimed, complete and linked from the site
- [ ] AI visibility tracker with a fixed list of buyer prompts
- [ ] Weekly dashboard shared by marketing and sales

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Pipeline created by source				
MQL-to-SQL conversion rate				
Win rate (rolling 90 days)				
CAC payback (months)				
Median speed to lead				
AI share of answers on tracked prompts				
G2 review count and average rating				
Trial activation rate				

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	Snapshot, personas and positioning; agree lead definitions with sales; fix CRM source tracking		☐
Month 2	Pricing page, first comparison and integration pages; claim and complete review profiles		☐
Month 3	Google Ads on brand and competitor terms; LinkedIn retargeting; weekly dashboard live		☐
Month 4	Email nurture for trials and demo no-shows; first customer story; first CAC payback review		☐
Month 5	LinkedIn ICP campaigns; review requests built into onboarding milestones		☐
Month 6	Tier 1 launch with full campaign; mid-year funnel math review and budget reallocation		☐
Month 7	Co-marketing with top integration partner; marketplace listing refresh		☐
Month 8	Original data report; outreach to press and newsletters in your category		☐
Month 9	Webinar series; AI visibility audit and gap fixes		☐
Month 10	Second partner campaign; refresh comparison pages for competitor changes		☐
Month 11	Expansion campaign to current customers; case study and review push before renewals		☐
Month 12	Annual review: rerun funnel math with real conversion rates and set the 2028 plan		☐

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 Calling every form fill an MQL

Write the definition with sales and score leads on fit and intent, not volume.

- [ ] We do this today

02 Gating everything

Gate benchmarks, templates and ROI tools; keep explainers and comparisons open for buyers and AI tools.

- [ ] We do this today

03 Running LinkedIn like Meta

Target the buying committee, rotate formats and judge campaigns on pipeline over months, not clicks over two weeks.

- [ ] We do this today

04 Ignoring review sites until a deal is lost

Ask for reviews at onboarding milestones and renewals, every month.

- [ ] We do this today

05 Hiding how pricing works

Publish prices, or at least the pricing model, the drivers and a starting point.

- [ ] We do this today

06 Measuring launches by launch-day traffic

Tier launches and measure pipeline influenced over the next 90 days.

- [ ] 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**	Fill in the snapshot, personas and positioning; interview five recent customers about their trigger and shortlist
☐	**Week 2**	Agree MQL and SQL definitions with sales; add source fields and the How did you hear about us field
☐	**Week 3**	Run 20 buyer prompts through the main AI assistants and record who gets named; update review profiles
☐	**Week 4**	Publish or fix the pricing page, three comparison pages and your top integration pages
☐	**Month 2**	Launch Google Ads on brand and competitor terms, LinkedIn retargeting and one ICP campaign
☐	**Month 3**	Build the weekly dashboard, calculate CAC payback and tier the next two launches
☐	**Quarter 2**	Run partner co-marketing, publish one original data report and start a webinar series
☐	**Year 1**	Rerun the funnel math with real conversion rates and move budget to the sources that produced pipeline

NOTES

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

MaaS by CodeSM is the outsourced marketing team for small and mid-sized B2B software and tech companies with a sales-led or hybrid product-led motion. 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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