

Marketing Operating System

Blueprint

The complete implementation guide for closing the marketing execution gap. Annual planning template, quarterly OKR framework, weekly operating cadence, accountability matrix, and KPI framework.

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Annual Planning Template

Complete once per fiscal year, ideally during Q4 before the year begins. Every quarterly plan should be traceable back to this frame.

FISCAL YEAR

State the year and the single most important thing marketing must achieve by year-end.

e.g. "By end of FY26, marketing will have built the pipeline infrastructure to support 40% revenue growth without proportional headcount increase."

BIG BET 1 — PRIMARY GROWTH LEVER

One sentence. The most important strategic shift this year. Be specific enough that someone could evaluate whether you achieved it.

e.g. "Transition from campaign-centric to signal-centric ABM, targeting 50 named accounts with coordinated multi-channel engagement."

BIG BET 2 — CAPABILITY OR INFRASTRUCTURE

What capability are you building that does not exist today, and why will it matter?

e.g. "Build a measurement infrastructure that ties spend to pipeline with a 14-day or shorter attribution lag."

BIG BET 3 — OPTIONAL

Only include a third bet if it is genuinely strategic, not a continuation of existing work. Most organizations have two real bets.

WHAT WE ARE NOT DOING THIS YEAR

List 2-4 things marketing will deliberately not pursue this year, and why. Explicit de-prioritization prevents strategy dilution.

e.g. "We are not launching a brand campaign this year. That investment returns in FY27. The priority now is pipeline infrastructure."

RESOURCE ALLOCATION CHECKPOINT

For each big bet: what percentage of your budget and team time will actually serve it? If the answer does not match the stated priority, reallocate before proceeding.

Quarterly Planning Template

Complete one template per Big Bet, per quarter. Most organizations run 2-3 active bets at any time.

QUARTER ____ BIG BET _____

OBJECTIVE STATEMENT

One sentence. What specific, measurable outcome will be true by end of this quarter? Must be achievable in 90 days.

e.g. "Q2: Launch ABM program for 15 Tier 1 accounts, all receiving coordinated outreach across at least three channels."

KEY RESULT 1 (BASELINE / TARGET / OWNER)

Use outcome metrics, not activity metrics. Each KR needs a baseline, a target, and a single named owner.

e.g. "15 Tier 1 accounts with active multi-touch engagement sequences (baseline: 0, target: 15, owner: [Name])"

KEY RESULT 2

KEY RESULT 3 (OPTIONAL)

DRI — DIRECTLY RESPONSIBLE INDIVIDUAL

One person. Not the team. This person owns the outcome and presents status at the monthly business review.

TOP 3 RISKS + MITIGATIONS

What are the three things most likely to prevent you from achieving this objective? For each, what is the mitigation plan?

CROSS-FUNCTIONAL DEPENDENCIES

What do you need from Sales, Product, Finance, or other teams? Have those conversations before the quarter starts, not during it.

Weekly Operating Cadence

Four meeting types, four time horizons. Each has a distinct purpose — do not let them bleed into one another.

WEEKLY Team Sync	MONTHLY Business Review	QUARTERLY Planning Session	ANNUAL Strategy Setting
- Weekly commitment review - Blockers surfaced and cleared - Key decisions logged - 30 minutes maximum	- Quarterly objective status by DRI - Leading indicators vs. targets - Decisions needed from leadership - Resource adjustments flagged - 90 minutes structured	- Prior quarter retrospective - New quarterly objectives set - Resource reallocation if needed - DRI assignments confirmed - Half-day minimum	- Annual frame written or refreshed - Big bets confirmed - Resource allocation aligned - Team communication plan set - Full-day offsite preferred
Day / Time:	Day / Time:	Day / Time:	Day / Time:

Accountability Matrix

Assign a single DRI to each outcome before the quarter starts. "Shared ownership" is not ownership. Review at every monthly business review.

Outcome	DRI	Decision Rights	Cadence	Escalation
Pipeline sourced (marketing)		Budget allocation, channel mix, campaign strategy	Monthly MBR	CMO
Target account engagement		Account list, content, outreach cadence	Monthly MBR	CMO
Content program		Topics, formats, production schedule, distribution	Monthly MBR	CMO
Demand generation		Channel allocation, budget, targeting, creative	Monthly MBR	CMO
Marketing operations		Tool selection, data governance, process design	Quarterly	CMO
Brand and positioning		Messaging, visual standards, brand review	Quarterly	CMO
Sales enablement		Asset production, sales training, content calendar	Monthly MBR	CMO
[Add outcome]				

KPI Framework

Outcome metrics only - not activity metrics. Fill in the Baseline and Target columns before the quarter starts. Agree all pipeline definitions with Sales before publishing.

Category	KPI	Cadence	Owner	Baseline	Target
Pipeline	Pipeline sourced by marketing (\$)	Monthly			
Pipeline	Pipeline influenced by marketing (\$)	Monthly			
Pipeline	Pipeline velocity (days)	Quarterly			
ABM	Target accounts with multi-touch engagement	Monthly			
ABM	Tier 1 account meeting rate	Monthly			
Content	Content-influenced pipeline	Quarterly			
Brand	Brand consideration (target segment)	Bi-annual			
Efficiency	Cost per pipeline dollar sourced	Quarterly			
Team	Quarterly objective completion rate	Quarterly	All DRIs	-	80%+
[Add]					

Monthly Business Review Agenda

90 minutes. No status theater. Every DRI presents facts and forward-looking decisions. Decisions made in this meeting are logged before the room clears.

DATE _____ QUARTER ____ MONTH IN QUARTER ____

0:00-0:10 | OPENING: STRATEGIC CONTEXT

CMO or VP Marketing restates the quarterly objectives and flags any context changes since last month. This grounds the review in strategy, not just numbers.

0:10-0:50 | DRI OUTCOME REVIEWS (10 MINUTES EACH)

Each DRI presents: (1) status vs. quarterly objective; (2) leading indicator trend; (3) risks and blockers; (4) decision needed or recommendation. Factual and forward-looking — not effort narratives.
