2027 Annual Marketing Strategy Workbook

Strategy before tactics.

A practical, fillable workbook to connect business goals with audiences, messaging, channels, budgets, content, and measurement.

A free planning resource from oneteam(TM)

Nine essential planning questions →

Work through the nine sections, identify your three biggest priorities, and revisit your plan each quarter. Type directly into the fields or print and write.

Prepared for

Date

Why strategy comes first

A full calendar is not the same as a strategy.

Campaigns, content schedules, promotions, and media plans are useful, but activity alone does not guarantee progress. Start by asking: What does the business need from its marketing efforts?

Connect the entire customer journey.

People may discover a brand on social media, research it through search, engage with email, and eventually buy online, visit in person, or purchase at retail. Your channels should work together rather than operate in

Give each channel a clear job.

Awareness, consideration, conversion, and retention require different tactics and different KPIs. Define how each investment supports a business outcome before deciding how much to spend.

Plan for seasonality and production.

Anticipate launches, peak demand periods, retail moments, and content requirements. Planning ahead helps prevent rushed creative production and reactive budget decisions.

Measure outcomes, not just activity.

Select KPIs based on the objective: qualified leads, revenue, bookings, customer retention, reach, or other meaningful results. Establish review points before campaigns launch.

Want To Go Deeper? **READ THE FULL ARTICLE: STRATEGY BEFORE TACTICS**

The principle

Think annually to set direction. Prioritize quarterly to focus resources. Optimize continuously based on evidence.

How to use this workbook

Use the questions as a starting point, not a rigid template. Keep answers specific and actionable.

1. Begin with business outcomes

Define what success should look like at the end of 2027. Be specific about growth, revenue, awareness, visitation, leads, or retention.

2. Work through the nine prompts

Answer each question in plain language. Involve stakeholders from marketing, sales, e-commerce, operations, and leadership as relevant.

3. Connect the decisions

Check that audiences, messages, channels, budgets, and content all support the same business priorities.

4. Choose three priorities

At the end, identify the three highest-impact actions, assign an owner, and decide when progress will be reviewed.

The nine-step framework →

01 Business Goals | **02 Audience** | **03 Customer Journey**

04 Messaging | **05 Channels** | **06 Budget**

07 Content | **08 Measurement** | **09 Optimization**

Tip: Download the PDF and save a copy before typing. Some browser PDF viewers may not preserve form entries unless you save the completed file.

Build your 2027 strategy

01 BUSINESS GOALS

What does the organization need to accomplish?

Think revenue, growth, awareness, leads, retention, or visitation.

02 AUDIENCE

Who needs to take action for those goals to become reality?

Identify priority segments, needs, and barriers.

03 CUSTOMER JOURNEY

How will audiences discover, consider, purchase, visit, or engage?

Map the most important touchpoints and decision moments.

Build your 2027 strategy

04 MESSAGING

What does the brand need to communicate at each stage?

Clarify value propositions and reasons to believe.

05 CHANNELS

Which channels can best influence those audiences?

Give every channel a specific role in the journey.

06 BUDGET

Where and when should resources be concentrated?

Consider seasonality, launches, markets, and growth priorities.

Build your 2027 strategy

07 CONTENT

Which creative and content assets will be required?

Plan production for ads, email, web, organic social, and retail.

08 MEASUREMENT

Which KPIs will show whether the strategy is working?

Tie performance measures to business outcomes.

09 OPTIMIZATION

How frequently will performance be reviewed and adjusted?

Define a monthly check-in and quarterly strategic review.

Turn strategy into action

Select the highest-impact priorities and establish ownership and review dates.

Priority 1

Priority 2

Priority 3

Strategy owner

Next quarterly review

Your strategy is a living plan. Review what changed, what worked, and where to focus next.