A marketing plan template you can run in 90 days

29 September 2026 · By Dan Chapman · chapmansconsulting.co.uk/insights/marketing-plan-template-90-day/

A useful marketing plan template fits on one page and holds three plays for the quarter: one that builds reach and credibility, one that turns interest into conversations, and one experiment small enough to lose. Each play has one owner, one decision measure and a written stop rule.

Why three plays, and why those three

In my experience, many quarterly plans fail because they list everything the business could do. Three plays is a constraint I hold on purpose.

- **Reach and credibility.** Something that puts you in front of the right people and gives them a reason to trust you. A piece of expert content, a speaking slot, a partner introduction.
- **Conversion.** Something that turns existing interest into conversations: a clearer enquiry route, a follow-up routine, a page that answers the objection people actually raise.
- **An experiment sized so it can be lost.** A new channel or format, with a small enough budget that stopping it costs little.

Hold back about 20% of budget, and leave some hours free. In my experience a plan with no slack gets abandoned the first time something comes up.

A stop rule is the part most plans leave out. Write it before the play starts, when nobody is attached to it yet: "if this has produced fewer than two conversations by week eight, we stop." Otherwise a weak play survives on goodwill, and it takes time and budget from the ones that are working.

The plan sheet

Before the plays, fill in the fields that make them make sense:

- 12-month commercial goal
- Average first-year value of a new client (a planning estimate)
- Close rate (a planning estimate)
- Wins needed, then conversations needed per year and per month, and this quarter's slice (all calculated from the fields above)
- Biggest constraint (capacity, credibility, unclear offer, slow follow-up)
- Priority segment
- Core message
- Hours per week
- Budget, plus a reserve of about 20% (my rule of thumb, not a benchmark)

In the download this is the Plan sheet.

A decision measure is a number that tells you whether to keep, fix or stop a play.

Worked example (invented figures): a goal of £400,000 divided by an average first-year client value of £32,000 is 12.5, rounded up to 13 wins. At a 25% close rate that is 52 conversations a year, about 5 a month, or 13 this quarter.

If you cannot fill in the goal, average value, close rate and constraint, the plan is not ready. That is a direction question, not a planning one.

An illustrative example

The numbers below are invented, for a fictional 22-person advisory firm. They show the shape, not a benchmark.

Play	Owner	Decision measure	Stop rule
Reach: two expert articles and one partner introduction	Managing partner	Conversations started from either (count)	Stop if fewer than 2 conversations by week 8
Conversion: one-day reply standard and a follow-up routine	Operations manager	Enquiries that reach a call (count)	Redesign the route if replies slip past the standard for three weeks running
Experiment: a small LinkedIn test to one segment	Marketing lead	Meetings booked (count)	Stop at week 8 if fewer than 2 meetings are booked

Set the week-8 threshold from your own sales cycle, because content and partner plays lag.

The rhythm that keeps it honest

A plan without a review is a document. I would run a 20-minute weekly check: what moved, what is blocked, is any stop rule triggered. Then a one-page monthly report with the counts and a short note on what you decided. The wider pattern is in what a marketing operating rhythm is.

When volumes are small, use counts and dated notes; B2B marketing KPIs for small volumes covers how.

Why 90 days

In my experience, 90 days is long enough to tell whether a play is working (the first 90 days of a fractional marketing director shows the same horizon). Sales cycles are often longer, so judge early indicators, not closed revenue.

What this will not fix

It will not fix an unclear proposition. If people do not quickly understand what you offer and why it matters, three tidy plays will run efficiently in the wrong direction. Start with offer and positioning, then plan. For how the plan connects to the direction behind it, see a marketing strategy framework that starts with direction.

Free downloads, no sign-up: the plan template (XLSX), a printable version (PDF) and this guide as a PDF.

Where to start

Fill in the plan sheet on your own first. If you cannot agree the constraint or the priority segment, that is worth a conversation, and a Strategic Marketing and Operations Review is the simplest way to settle it. I'd be glad to compare notes.

Frequently asked questions

What should a marketing plan template include?

A 12-month commercial goal, this quarter's slice of it, the conversations you need each month, your biggest constraint, a priority segment, a core message, and the hours and budget available. Then three plays, each with an owner, one measure and a stop rule.

Why 90 days rather than a 12-month plan?

A quarter is short enough to change course cheaply and long enough to see whether a play is moving. It will not show closed revenue in most B2B businesses, so judge conversations booked and proposals sent instead.

How do I measure a plan when volumes are small?

Use counts, not rates. Track enquiries, conversations and proposals as whole numbers, and add a dated note beside each change you made. A percentage built on eight enquiries tells you very little; a dated count tells you what happened.

What if the plan keeps slipping?

Check the plan sheet first. Slippage usually means too many plays, no single owner, or no unallocated time. Cut to three plays, name one owner each, and hold back about a fifth of budget and some spare hours for things that come up.

This is a copy of the guide at chapmansconsulting.co.uk/insights/marketing-plan-template-90-day/. The web version is kept up to date; this copy is as at 29 September 2026. Free to share; please credit Chapman's Consulting.