Annual Marketing Review (AMR)

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Review your business goals, marketing campaigns, channels and plans for the year ahead.

Company Name:

Date:

Business Goals

In very high level terms, describe the business goals for the year ahead eg:

- Growth plans and % goals
- New locations
- New products
- New services
- New audiences

Tier 1 versus Tier 2 Problems

What are your Tier 1 (we '**must**' fix) problems versus your Tier 2 (we '**want to**' fix) problems.

This is important: be wary of giving too much attention to Tier 2 problems and neglecting the more important Tier 1 problems.

Tier 1 (we 'need' to fix)	Tier 2 (we 'want' to fix)

Attribution

- How are you currently tracking/attributing conversions?
- Do you know which Channels are most successful for you?
- How do you decide where to promote a new campaign?

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Campaigns

Describe general campaigns you have in mind for the year ahead.

They can be very general at this stage eg

- 'awareness campaign to promote our new XXX product' or
- 'campaign to introduce us to a new audience/market of YYY' or
- 'new brand unveiling' or
- 'retention campaign to grow revenue per existing customer', etc

Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec

Content Strategy

Audiences/Personas
(Are your personas up-to-date)

Topics
(Are there new content approaches you'd like to discuss and plan for the year)

Formats
(Are there new formats you'd like to work on eg video, podcast, infographic, etc)

Reporting

Are your current reports and dashboards delivering the visibility you need?

(What extra reporting is required? - what can be removed)

Key metrics to track	Key trends to track

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Funnel Analysis

What stages of the lifecycle are working well? What needs work? (ie how do we best 'solve for the problem'?)

Example: do you have a traffic problem? Do you have a leads problem? Do you have a sales problem?

Important: many companies focus on top of the funnel traffic generation, instead of where their real problem is: conversion to leads and customers.

Stage	Ratings*	Comments/Actions required
Awareness (TOFU)		
Consideration (MOFU)		
Decision (BOFU)		
Advocates (Delight)		Repeat customers, referrals?

*Rating: (1 = bad, 10 = good)

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Channels and Placement

Review the promotion channels (eg advertising, social, partner sites) to clarify the focus

Stage	Ratings*	Comments/Actions required
<current channels in use> Eg some typical channels: • Email • Organic • PR • Conferences • Google Ads • Bing Ads • Google My Business • Twitter profile • Twitter ads • Facebook Ads • Facebook page • Facebook group • LinkedIn page • LinkedIn ads • YouTube channel • YouTube ads • Instagram profile • Instagram ads • Medium publication • Spotify ads • Soundcloud • iTunes • Pinterest boards • Pinterest ads • Quora answers • Quora ads • TikTok profile • TikTok ads • Job boards • Job board ads • Industry sites • TechMeme • Stack Overflow • Influencers • Clubhouse	<channels to reduce focus on this year>	Increase: <channels to increase focus on> Add: <channels to add to the mix>

Budgets

Outline top level budget plans (approx monthly) for:

- Strategy and planning
- Content creation
- Campaign promotion (ad platforms, social)

Next Steps

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