

# SaaS Marketing Strategy Template

**XANDER**  
MARKETING

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The SaaS Marketing Agency



# INTRODUCTION

## Why do you need a Marketing Strategy?

Do you want more customers, leads or website traffic?

Do you want to understand what marketing you can do and the results you could get from that?

If you can answer yes to either of these questions writing a Marketing Strategy for your business is vital to your success.

This template provides everything you need to write a Marketing Strategy for your SaaS business.

A Marketing Strategy will:

- Ensure a strategic approach is undertaken to marketing guaranteeing all future marketing tactics are undertaken with a long term purpose in mind and deliver an ROI
- Have tangible, financial goals to aim for so the value of ongoing marketing can be measured
- Identify potential new markets and ensure that sales and marketing teams have a focus rather than adopting a scattergun approach
- Ensure your brand is working as hard as it can to portray your business
- Develop reusable marketing messages that can be used through all marketing
- Ensure all marketing is consistent





# THE XANDER MARKETING 10 STEP MARKETING STRATEGY PROCESS:

## 1. BUSINESS

What is it?

## 2. OBJECTIVES

Business objectives

## 3. MARKETPLACE

What is the size of your marketplace?

## 4. TARGET MARKET

Who are your customers?

## 5. COMPETITION

Who is your competition?

## 6. USP

What makes your business unique?

## 7. YOUR BRAND

What does your brand stand for?

## 8. MARKETING MESSAGES

What messages should run through your marketing?

## 9. MARKETING MIX

What marketing tactics should you utilise to execute your strategy?

## 10. MARKETING PLAN

An action plan for your 12 month and monthly Marketing Strategy



# 1. BUSINESS

How did the business start? What's the history of the business?

Where is the business located?

Include all locations

What software does the business sell?

### What is the vision of the business?

What does the business aspire to?

### What is the mission of the business?

How will the vision be achieved?

### What is the future for the business?

Where would you like the business to go?

What is the pricing of your SaaS product?

Are your prices high, competitive or low?  
Why are they priced this way?

## SWOT Analysis

Undertake a SWOT Analysis of your business.

### STRENGTHS

What internal strengths does your business have?

### WEAKNESSES

What internal weaknesses does your business have?

### OPPORTUNITIES

What external opportunities could your business pursue?

### THREATS

What external threats are there to your business?



## 2. OBJECTIVES

What are your business objectives and how can your marketing objectives help you achieve these? Make them SMART (Specific, Measurable, Attainable, Relevant and Timebound).

How many customers does your business currently have?

How many customers would you like in 12 months time?

What is your current ARR (Annual Recurring Revenue) and MRR (Monthly Recurring Revenue)?

What is your 12 month target ARR (Annual Recurring Revenue) and MRR (Monthly Recurring Revenue)?

What is your current lead to customer conversion rate?

Therefore how many leads do you require to achieve your new customer goal?

What is your website conversion rate?

If your website conversion rate remains static how much traffic to you need to get your target leads and customers?

Given the answers to the above...

What are your business objectives or goals?

What are your marketing goals?



### 3. MARKETPLACE

A marketplace is the competitive landscape you operate in. Whether that's how many FDs in 100 – 300 person companies there are in the US or understanding how many SMEs there are in the UK.

What is your marketplace?

What is the size of your marketplace/s?

What marketplace do you operate in?	What is the size of market in terms of money, number of customers, geography?	As a percentage how much of this marketplace would you like to acquire, now and in the future?

Is it a growing or declining market?

Explore this? Where will the market be in 5 years and 10 years time?

What are the current trends in your marketplace/s?

What is being said in the news about your marketplace?



## 4. TARGET MARKET

This section looks at your customers and the types of customers you would like.

### Who are your current customers?

Who's your biggest? Who's your smallest? What's an average customer like?

What are their demographics?

- Consumers: age, gender, career level etc
- Businesses: industry, location, job title etc

### Who is your ideal customer?

Describe them in detail. Why are they your ideal customer?

### What's on your customer's mind?

What's hot on their agenda now? What other brands do they buy? What problems do they have?

What is the size of your marketplace/s?

List all your target markets	Why would they use your product or service?	Who is the decision maker (may only be applicable when selling to businesses)



## 5. COMPETITION

Who are your competitors and why are you better than them? Think about who else offers your products and services directly and indirectly. For example whilst many software companies have competitors, they may also be competing with a manual process done on a spreadsheet or clipboard.

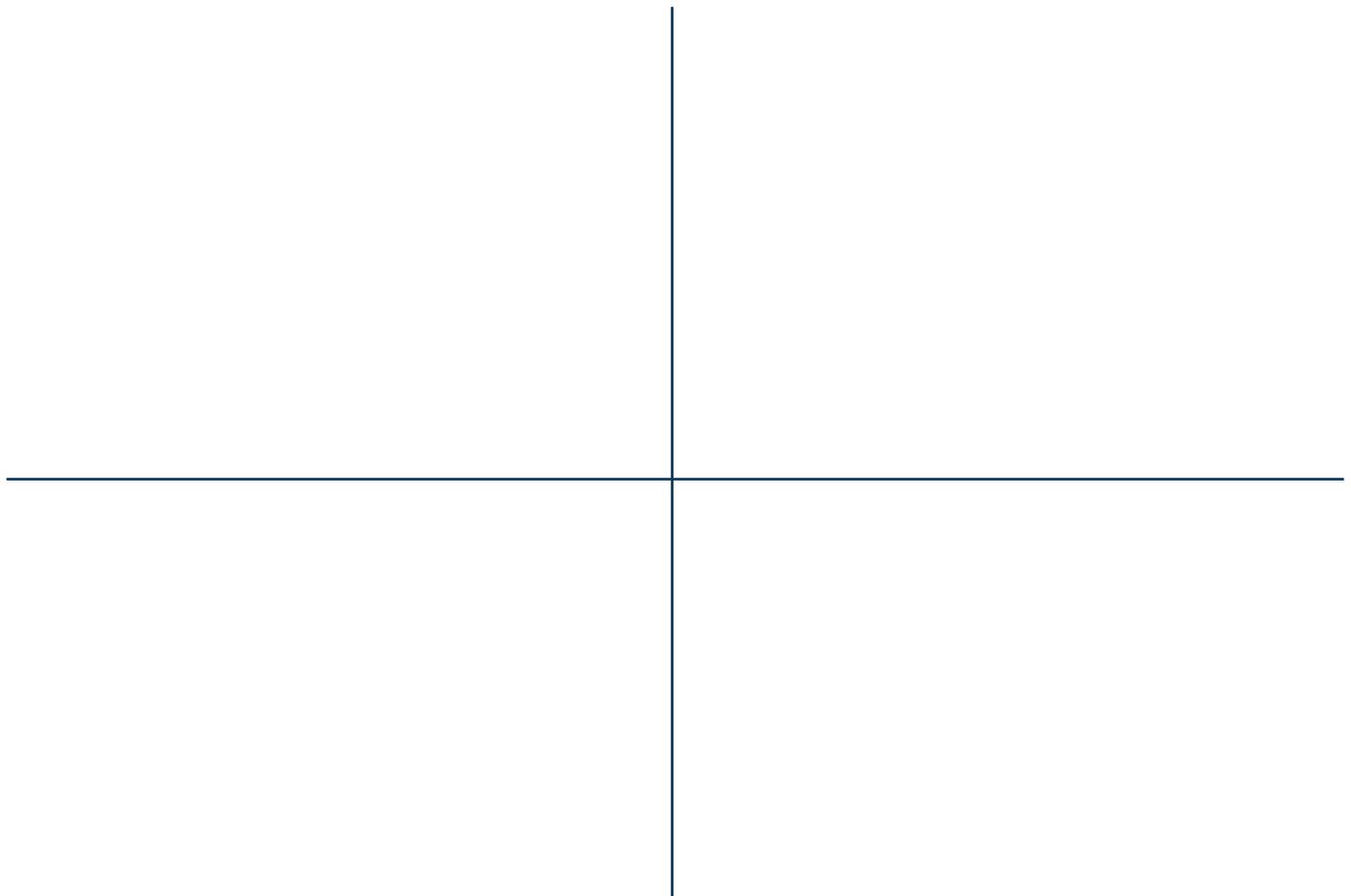
Competitor analysis			
Competitor	Positioning	Assessment	Your business advantage
Name of competitor	How is their business positioned?	What is your assessment of the threat of this business to you?	Why would customers come to your business rather than your competitors?

## How are you positioned against these businesses?

What are your strengths? Why would a customer come to you rather than these businesses?

You may want to use the grid below to plot your competitive positioning. Take two measures and plot them on the X and Y axis. Measures could be small businesses at one end, large businesses at the other end. Or premium and expensive brands at one end and low quality and cheap brands at the other end.

Plot where your competitors are on this grid and plot where you are.  
Where are you positioned now? Where would you like to be positioned in the future?





## 6. USP

Your unique selling proposition is the one thing, or combination of things which makes your business unique.

What is your company status in the marketplace?

How do customers view you?

What are your perceived strengths?

Are you a premium brand, standard brand or bottom of the range brand?

What is your unfair competitive advantage?

What is the one thing about you which puts your competitors at a disadvantage?

What edge do you have on your competitors?

Describe a real life example where you've delivered on this USP



## 7. BRAND

A brand is a complex area and requires more detail than this document can go into. However it needs to be considered as part of a Marketing Strategy. Firstly, what is a brand? We define it as a 'promise'. A brand portrays your business vision, mission, values and key messages. It needs to position and differentiate your company in the marketplace and it needs to appeal to your target market.

What are your business values?	
Value	Description
Name your value	Describe how you live this value

## What are your brand values?

Value	Description
Name your value? What does your brand stand for?	Describe how you live this value

If your brand was a car what car would it be?

By understanding this you can see how that car positions and markets itself and use ideas from here. You may also want to consider what supermarket, celebrity or biscuit your brand would be.

Describe your brand in a sentence

What one word epitomises your brand?



## 8. MARKETING MESSAGES

Now that you have identified your USP, you know your target market and your brand values, what marketing messages should you use throughout your business?

What are the benefits of your business and product/service?

List them

What are your marketing messages?

Concept	Message
Name a concept/benefit of your business or product/service	What marketing messages convey this? What imagery can convey this?



## 9. MARKETING MIX

Despite being number 9 on this list, this part is key. Consider all the marketing tactics your business could utilise. Some marketing tactics are below. Describe what your business could do with each of these.

Marketing Mix		
Channel	Outcomes	What could your business do?
Website	Leads, sales through your website	
Search engine optimisation	Ranking highly in search engines	
Pay Per Click	Driving traffic to your website	
Facebook	Interacting on Facebook, driving targeted traffic to your website	
Twitter	Interacting with customers and potential customers	
LinkedIn	Product videos or informative videos educating your customers	
Blogs	Articles educating customers. Would help with SEO	
Discussion forums	Sharing knowledge	
Email marketing – lead generation	Generating leads through emailing targeted lists	
Lead generation landing pages	Leads. Visitors exchange email address for free information	

Marketing Mix		
Channel	Outcomes	What could your business do?
Email marketing – lead nurturing	Warming leads up that provide email address	
Email marketing – newsletter	Keep your customers up to date	
Affiliate programme	Advertising on other websites	
Direct mail	Direct mail	
PR	Building awareness in the media	
Advertising	Brand building and driving traffic, enquiries and new customers online	
Onboarding	Improving your free trial to paying customer conversion rate	
Collateral production	Supporting sales and marketing brochures and case studies	
Content marketing	Educating prospects and customers through white papers, blogs, emails etc	
Telemarketing	Appointments or sales	



## 10. MARKETING PLAN

Now it's time to pull everything together into an executable plan. Use the table below to plan what you would do with each channel over the next 12 months:

Marketing Mix for the next 12 months				
Channel	12 month objectives	12 month outline plan	Initial activity	Ongoing activity
Name of competitor	How is their business positioned?	What is your assessment of the threat of this business to you?	Why would customers come to your business rather than your competitors?	On an annual, monthly and weekly basis what activity do you need to undertake with this channel?

## Marketing Mix for the next 12 months

Channel	12 month objectives	12 month outline plan	Initial activity	Ongoing activity
Name the channel (from above)	What are your objectives for this channel over the next 12 months?	How are you going to achieve these objectives, at a high level?	What do you need to in the next month?	On an annual, monthly and weekly basis what activity do you need to undertake with this channel?

Monthly plan		
Activity	Completed date	Owner
Each month, list all the activity you are going to do e.g. Write a white paper or create monthly newsletter	When should each activity be completed by	Who is the owner of this activity in your business?
Month 1		
Month 2		
Month 3		

Monthly plan		
Activity	Completed date	Owner
Month 4		
Month 5		
Month 6		

Monthly plan		
Activity	Completed date	Owner
Month 7		
Month 8		
Month 9		

Monthly plan		
Activity	Completed date	Owner
Month 10		
Month 11		
Month 12		

If you achieve your objectives as defined in Step 2 how much new business will your business have?

What is your ROI from marketing?

How much of a marketing budget would you be prepared to invest to get that return?

## What software do you need to deliver this marketing?

Consider software for your website and improving that.  
Email marketing – from basic software to marketing automation.  
Social media management software, and more.

## What is your marketing budget?

List everything. Include the cost of your internal employees and external agencies or freelancers.  
Also determine a budget for advertising (to include PPC) and software.

# SUMMARY

All of the above should give you a better understanding of what is involved when developing a Marketing Strategy and by completing this you now should know how your business is going to move forwards with its marketing.

Good luck with it.

If you need any support with or want us to write a Marketing Strategy for you, just get in touch:

T: 0330 223 2770

E: [hello@xandermarketing.com](mailto:hello@xandermarketing.com)

W: [www.xandermarketing.com](http://www.xandermarketing.com)

## NEXT STEPS WITH YOUR SAAS MARKETING

Xander Marketing has worked with and looked after and performed the marketing function for a number of SaaS companies. We regularly write Marketing Strategies and Plans for SaaS businesses.

We are the outsourced marketing partner of choice for SaaS businesses that need more customers, leads, website traffic and to build their brands. We work in partnership with SaaS businesses around the world to deliver fully integrated online and offline marketing services that help you grow and:

- **Win new customers**
- **Increase and improve leads**
- **Generate more website traffic**
- **Build brands and become industry leaders**
- **Reduce churn rate**

It's this experience, and experience with SaaS businesses that makes Xander Marketing a great choice for businesses that value marketing but don't have the time, resource or know-how to do it themselves.

## GET IN TOUCH

We'd love to discuss how we could help your SaaS business grow. To find out more contact us on:

T: 0330 223 2770

E: [hello@xandermarketing.com](mailto:hello@xandermarketing.com)

W: [www.xandermarketing.com](http://www.xandermarketing.com)

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