

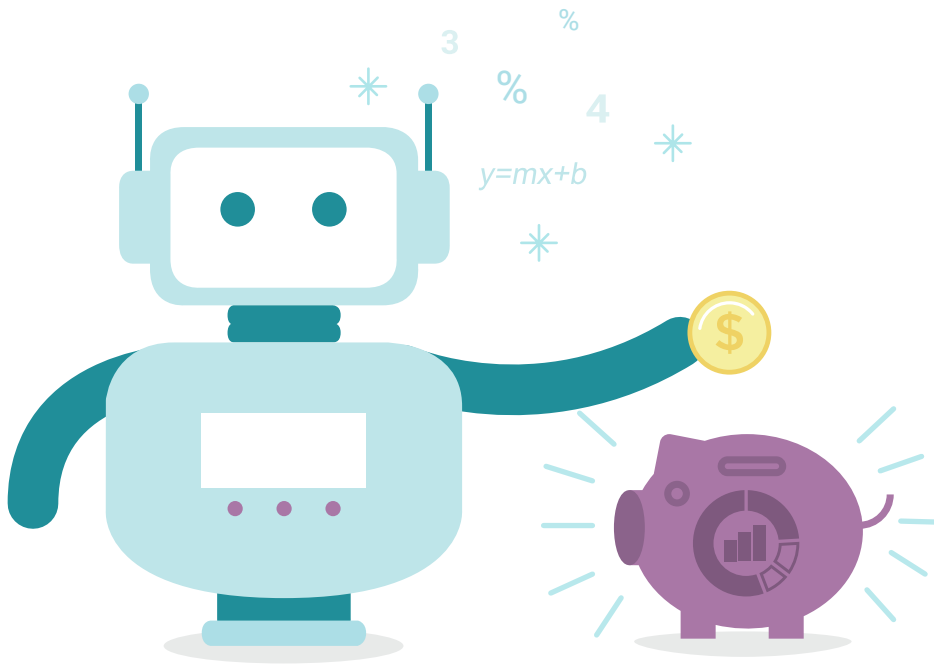
4 Must-Dos for

# MARKETING BUDGET PLANNING



# Table of Contents

1. Introduction
2. Document Your Strategy
3. Define Your Complete Ideal Customer Profile (ICP)
4. Build Growth Into Your Budget
5. Remove Guesswork with High-Quality, Complete Data
6. EverString AI for B2B Marketing and Sales is the Cornerstone of Your Planning
7. Conclusion



## Introduction

The budgeting process is usually frenzied and full of important moving pieces, especially for marketers. Programs and campaigns can be tough to plan; and more often than not, too many marketers rely on guesswork to get it done.

Your numbers need to head in the right direction next year, so your team must match its resources and spending with your most critical priorities **now**. Program planning and consensus building shouldn't rely on individual assumptions and biases. Working backward from your MQLs isn't going to cut it, either. There is a better way to complete a budget that actually reflects your ongoing and future goals.

Teams can remove uncertainty and free themselves from gut feelings and cherry-picked intel with AI-assisted marketing solutions.

*Letting data inform your strategy will ultimately simplify the selection of your most relevant accounts to target and optimize your marketing spending.*

Read on to find out how AI solutions remove marketing guesswork with EverString's 4 must-dos for marketing budget planning.

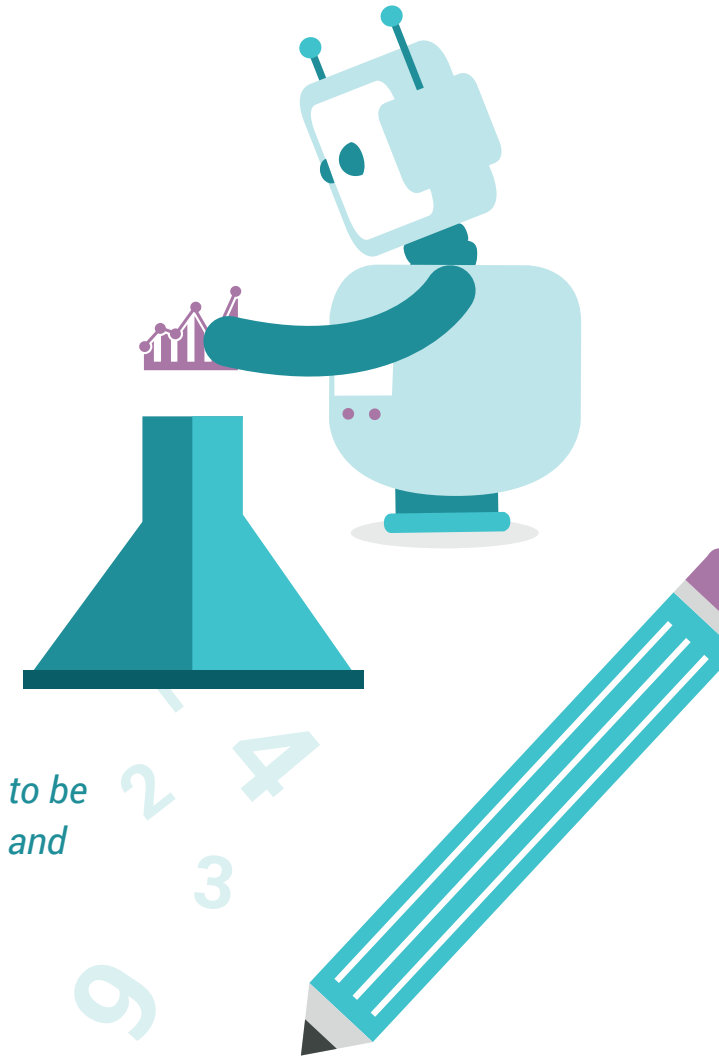
# 1. Document Your Strategy

Documenting your strategy is one of the first things you should do during budget planning. Through the act of writing your strategy down, you will clarify your own thoughts on how resources will best support growth. Plus, having a written document puts your budget allocations and your asks into the context of company goals. This makes it easier to get your peers, C-suite and board all aligned with your plan.

With that in mind, your marketing strategy for the coming year needs to be both forward-looking and agile. In B2B, the sands are always shifting as markets evolve, prospects change, competition strengthens and your own product improves. Strategies need to be data-driven based on what you've learned and seen in the past, but you also need to invest in agility in order to best address the only constant: **change**.

*Self-service AI solutions for B2B marketing and sales organizations allow you to be more data-driven when you're assessing your total addressable market (TAM) and identifying target accounts.*

It removes opinions and bias from budgeting discussions – because it's backed by data – and it aligns sales and marketing teams on the same set of target accounts right from the start. These same solutions allow the team to remain agile in the face of both anticipated and unanticipated events.







## 2. Define Your Complete Ideal Customer Profile (ICP)

Every good B2B marketing plan starts with “who.” You must succinctly answer the question of “who is my target customer” with a well-crafted ideal customer profile (ICP). Your ICP is a foundational part of your strategy as it is unique to your product, the stage of your business and your team’s specific growth goals for the coming year.

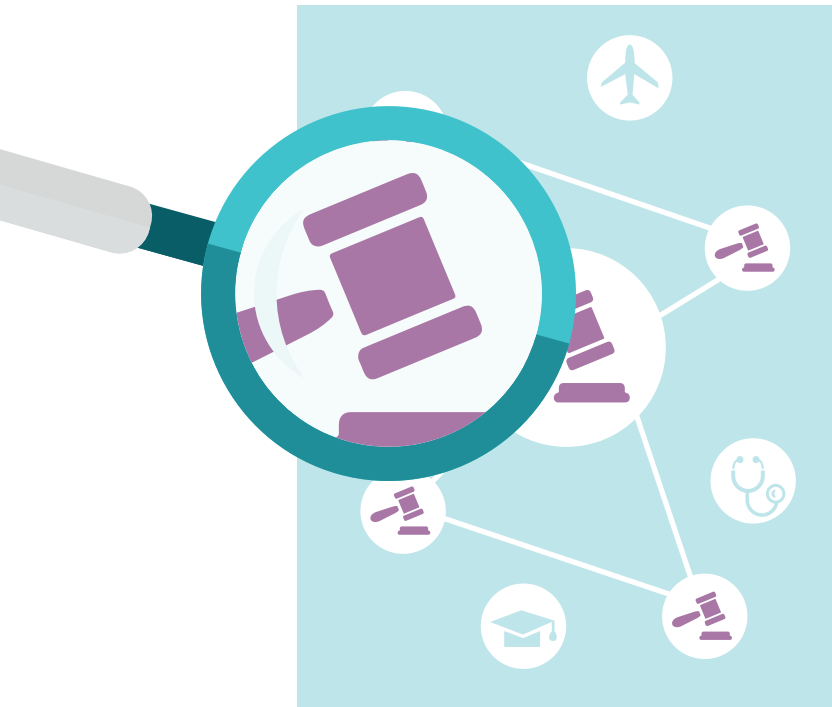
Companies are like icebergs. The visible tip above the water gives little indication of its true size and mass. Basic firmographics are the tip of that iceberg that you can easily see, but they are not enough to effectively qualify a company as a good fit for your product. Instead, you need a complete profile that extends beyond basic firmographics to differentiate a high-fit account from the rest.

Using complete profiles ultimately results in:

-  Highly qualified leads
-  More sales opportunities
-  Faster sales cycles
-  Higher marketing ROI

Applied AI solutions for marketing, like EverString, help you define your unique, complete ICP based on your current customers. Or, if your business is at an earlier stage, the companies you would like to have as customers.

You will likely be evaluating multiple scenarios over the course of a budget cycle, so speed is imperative. You cannot afford to wait weeks – or worse, months – for changes to your ICP. Ideally, you need a self-service AI solution which allows you, and any member of the planning team, to develop new models and audiences in minutes.



*The most powerful AI solutions for B2B marketing allow you to create complete ideal profiles and high-fit target account lists from just one company or a single keyword.*

### 3. Build Growth Into Your Budget

No company is ever content resting on its laurels. Even as you close out a great fiscal year, you know the top-down objective for next year will be some variation of “please show growth and do it faster!” So, in addition to building your strategy off your ICP, you need to allocate some resources to being agile.

Sometimes, serendipity strikes. Let’s say your sales leader just closed 3 law firms in a row. While law firms may have not been on your radar at the top of the year during budget planning, they should be now. The momentum is there, and you need to start generating demand in this new vertical.

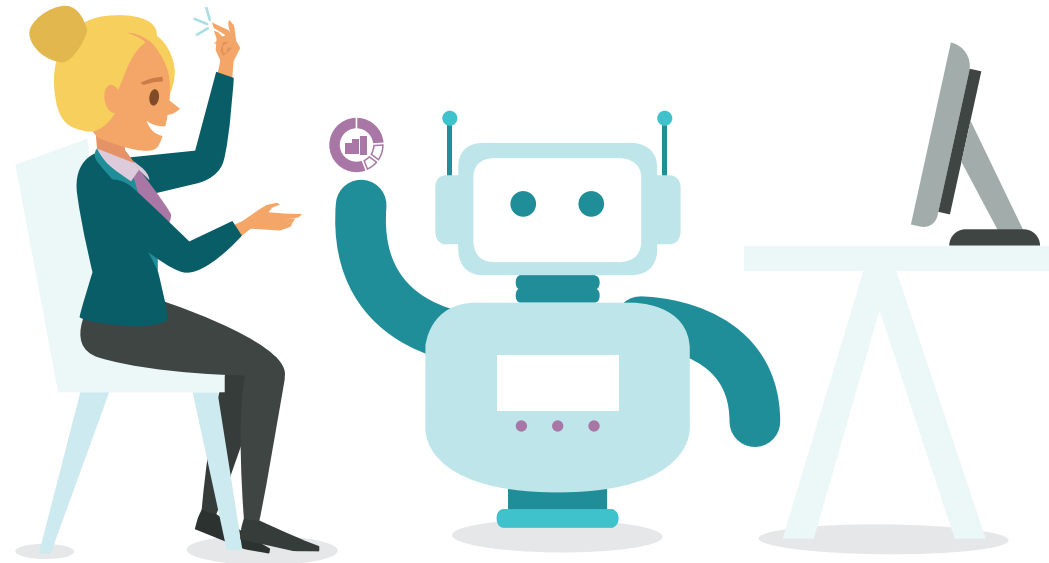
The most powerful AI solutions for B2B marketing allow you to create complete ideal profiles and high-fit target account lists from just one company or a single keyword. Even better are solutions like EverString which make AI immediately actionable directly within each salesperson’s existing workflow. In this way, as soon as an AE wins an opportunity she is able to immediately see all of the similar companies that she can prospect directly.

## 4. Remove Guesswork with High-Quality, Complete Data

Too often, B2B marketing leaders find themselves building their annual budgets when they are hobbled by incomplete and inaccurate data about target accounts. Go-to-market leaders have also had to make do with patchwork data from multiple vendors – none providing the end-to-end single source of truth.

The pain of bad data extends to your sales partners once that team begins working your plays. As soon as the company information is perceived as inaccurate or incomplete, confidence is lost and follow-through falters. In addition, significant account executive time is wasted on account research – on average 2 hours per company<sup>1</sup> – instead of business building calls, emails and meetings. It sounds so simple, but having accurate, complete sales intelligence about all of your organization's target accounts at your fingertips within your existing workflow is the best strategy for increasing sales cycle velocity.

The insights needed for accurate planning and day-to-day sales intelligence are numerous and always changing. This is why you need an AI partner with tens of thousands of up-to-date, company-specific elements – plus millions of derived insights and signals – to keep up with the speedy pace of modern B2B sales and marketing.



*An AI partner with tens of thousands of up-to-date, company-specific elements help you keep up with the speedy pace of modern B2B sales and marketing.*

<sup>1</sup> [dnb.com/perspectives/marketing-sales/sales-acceleration-b2b-trends-infographic.html](https://dnb.com/perspectives/marketing-sales/sales-acceleration-b2b-trends-infographic.html)

## EverString AI for B2B Marketing and Sales is the Cornerstone of Your Planning

It's clear every marketing leader can improve their planning and sales results in the coming year with an AI assist. Employing AI is critical at every stage, from:

- ▶ Developing a completely data-driven ideal customer profile that extends beyond obvious firmographics
- ▶ Intelligently selecting all of the target accounts which best fit your unique profile
- ▶ Remaining agile throughout the year to take advantage of serendipity
- ▶ Continuously updated sales intelligence insights for your sales team, saving hours of research

*EverString is the only self-service AI platform for B2B marketing and sales organizations*

Our innovative company insights platform continuously updates tens of thousands of data elements, and our AI derives tens of millions more. Every growth-focused B2B organization, regardless of size or stage, can now quickly and intelligently identify all of their target accounts. And, just as importantly, they can access the sales intelligence insights necessary to close new business quickly.

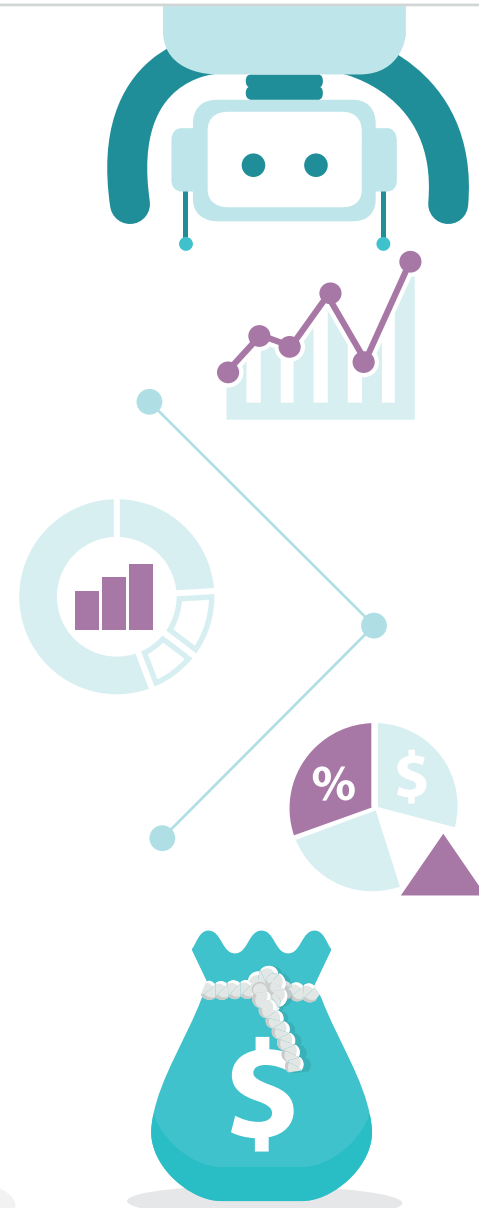


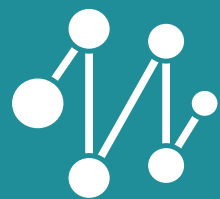
## Conclusion

With a marketing budget, there's little margin for error. Risk increases when organizations lean on guesswork to decide their target accounts. Marketing teams need AI solutions powered by data that will support a budget with ongoing campaign efforts and new opportunities for revenue.

The insights gained from an AI-powered platform like EverString allow B2B marketing teams to plan budgets backed by data, not guesswork.

**Contact EverString today** to schedule a custom demo. You'll see first-hand how an AI-powered platform will positively impact your organization's budget today, and reward you with faster growth in the coming year.





# EVERSTRING



[www.everstring.com](http://www.everstring.com)

[contact@everstring.com](mailto:contact@everstring.com) | (650) 425-3937