



# CMO Masterclass on Annual Planning in a Time of AI

Rowan Tonkin & Meghan Keaney Anderson



# Meet the Speakers



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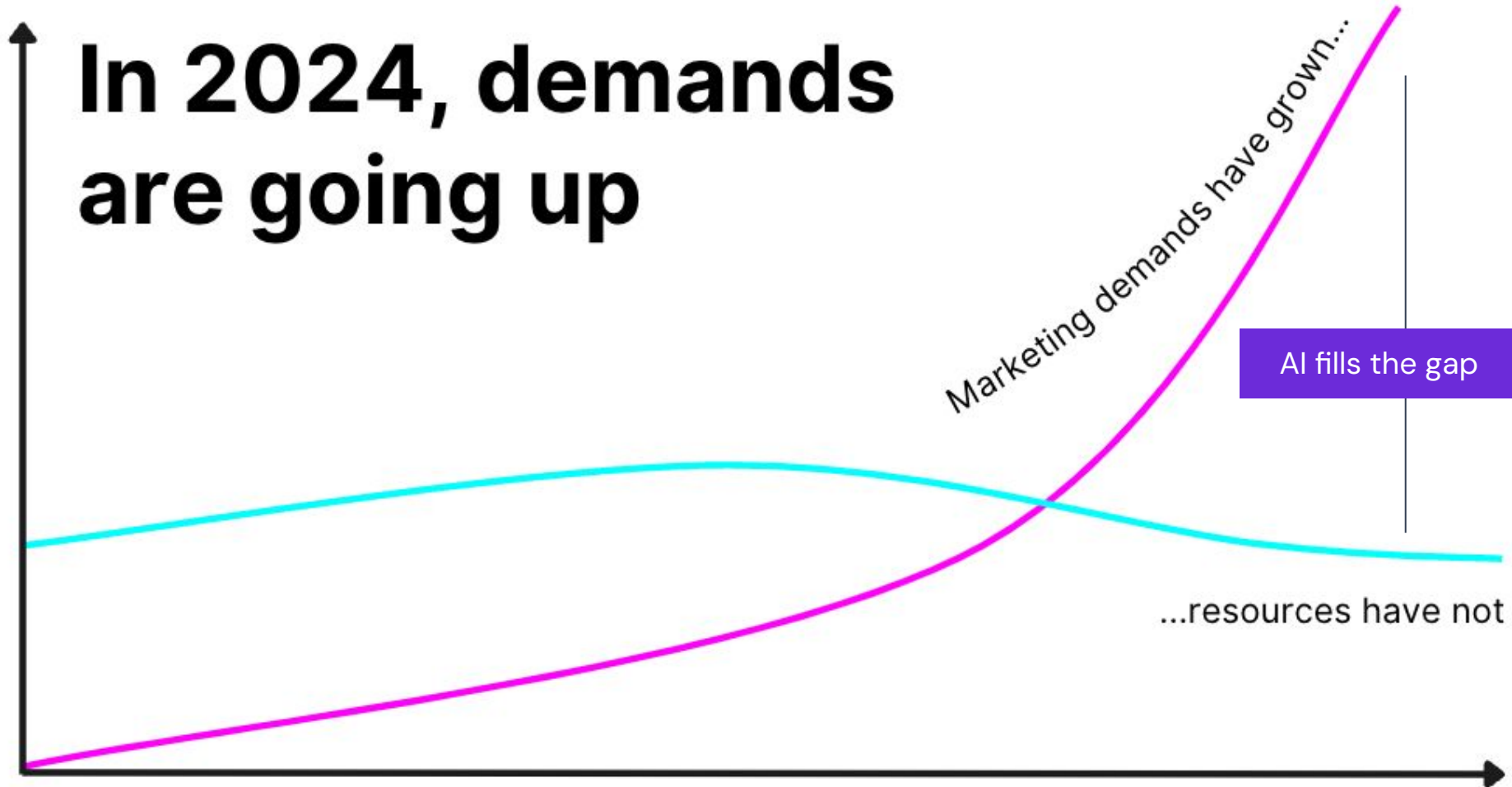
**Rowan Tonkin**  
CMO, Planful



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**Meghan Keaney  
Anderson**  
Head of Marketing, Jasper AI

# In 2024, demands are going up



Marketing demands have grown...

AI fills the gap

...resources have not

We ~~MUST~~ SHOULD  
get more efficient  
over time



# Let's demystify planning

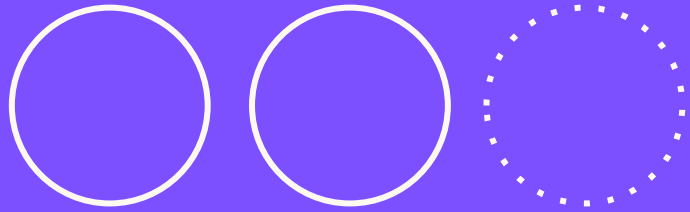


Finance is NOT  
your enemy.

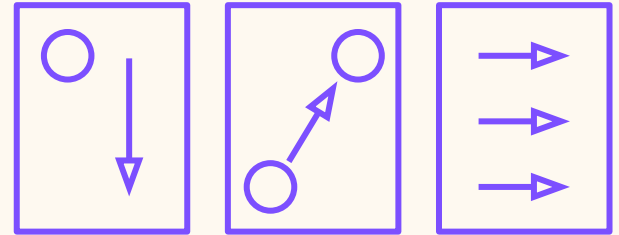


They're **investors.**

# Predictability



# + Playbooks



## Product

led growth and company lifecycle determine the variations

**Sales + Marketing** Spend as a % of OPEX

**Sales + Marketing** Spend as a % of Revenue

**Marketing** Spend as a % Revenue

**Marketing** Spend (Programs vs Headcount)

Playbooks  
have rules.



# Where can I learn about this?

RevOps2 – Reports

The SaaS CFO – Courses/Newsletter

Kellblog – Detailed blogs

Mostly Metrics – Newsletter

Insight Partners



# What are the **metrics** of your business?



## **Financial**

Bookings  
Revenue  
ARR  
Gross Margin  
NRR  
FCF

## **Commercial**

Pipeline  
ASP  
Win rates  
Cost of pipe

## **Operational**

# Leads  
# MQLs  
# Meetings  
Conversion rates  
Channel metrics

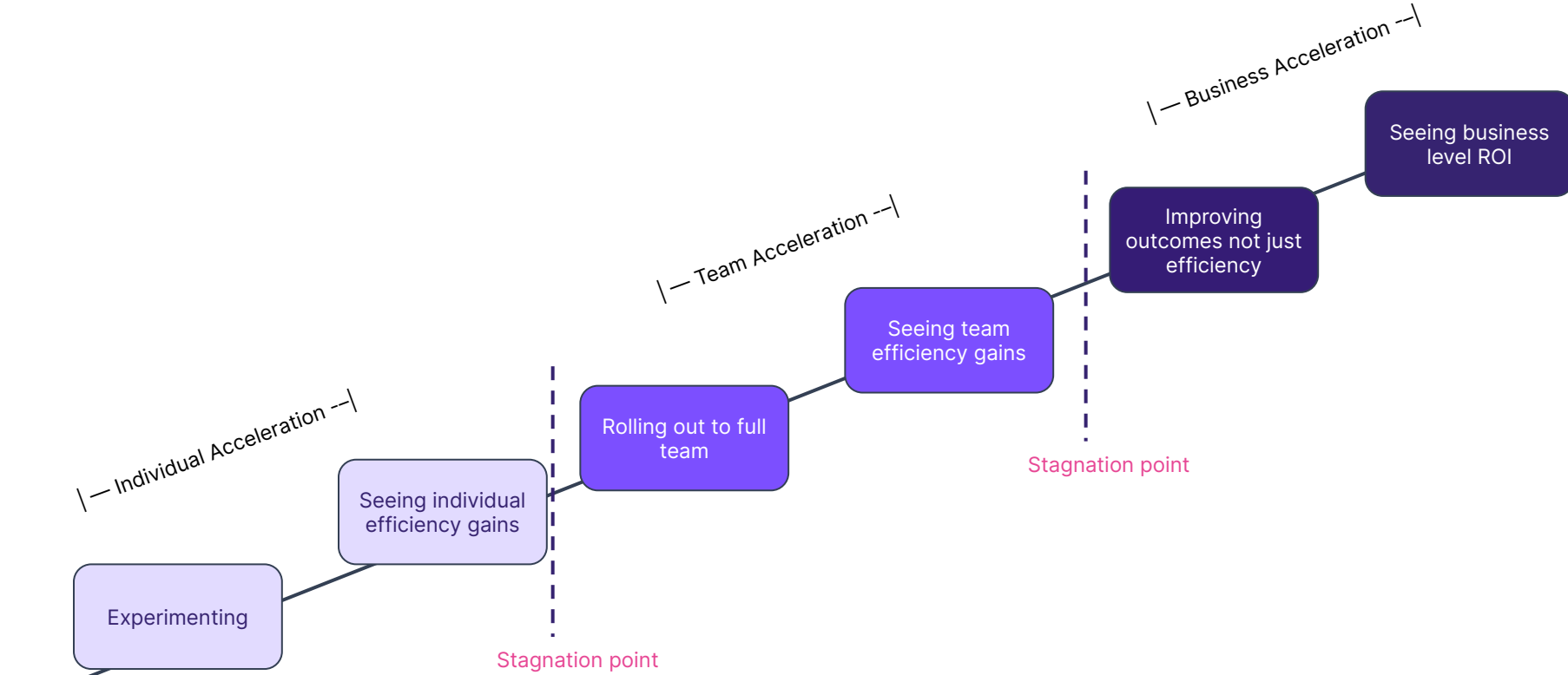
# Align Company Objectives with Finance + Marketing Goals

Business drivers for the year set by the executive team

Marketing & Finance have a role in achieving most company goals:

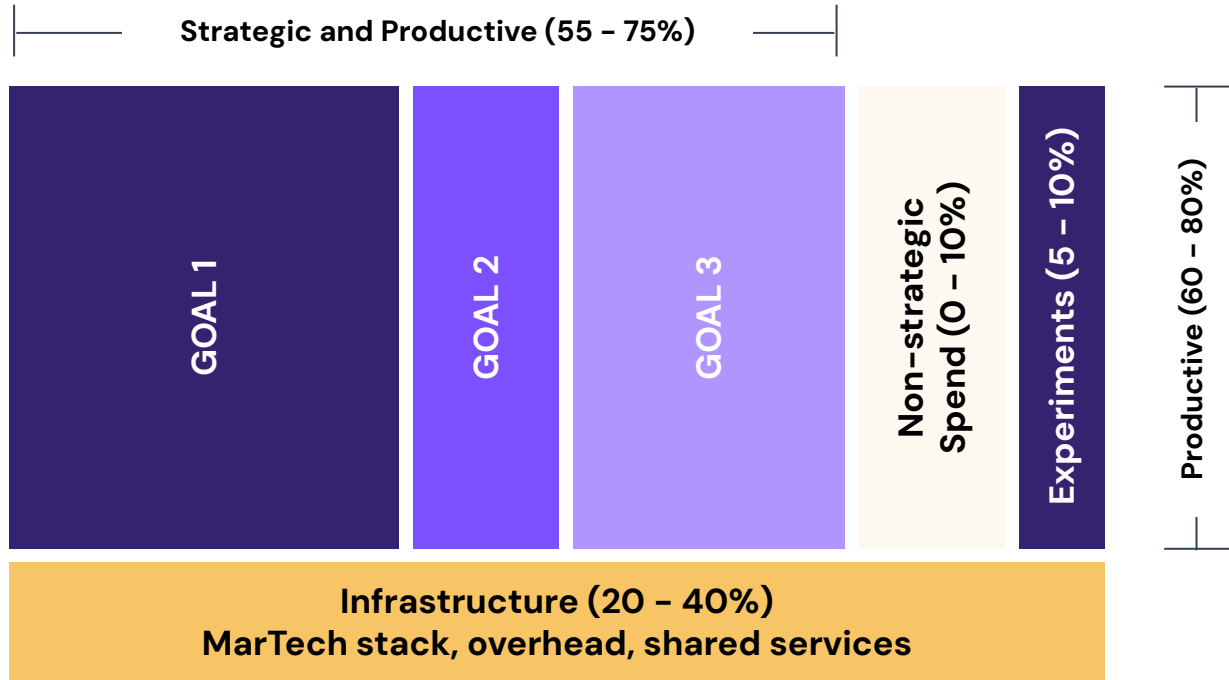
Company Goal	Opportunity	How AI can help
Grow sales	Lead generation, opportunity creation, sales tool creation	Increase capacity to create offers and improve efficacy of nurturing
Introduce a new product	Launch product, create awareness for new product	Expand launch promotions and align full team on positioning
Enter new geography	Create awareness, generate leads	Adapt content with regional understanding
Become #1	Thought leadership, share of voice, analyst ratings	Turn executive transcripts into thought leadership
Improve talent recruiting	Become "best places to work"	Reduce strain on your team and reinvest work into creative and strategic focus
Find efficiencies through responsible AI use	Increase revenue without decreasing quality	Set up responsible use standards and scope pilots and success metrics

# The AI adoption curve in businesses



# Budget Allocation

Best practice budget distribution – mandate the funds you need to achieve the goals



Increase Sales

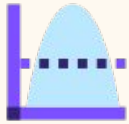
2M

\$ 6... \$ 350K \$ 4.1M

Sum of Allocation: \$ 6,480,000.00  
Sum of Spend: \$ 2,405,689.70  
Sum of Remaining Allocated: \$ 4,077,310.30

# Annual Planning with an AI Lens

## Targets and Capacity



What are the parts of your strategy that are capacity constrained? What are the parts of your expenses that are capacity driven?



Are there places where AI can help you run a successful campaign twice without additional resources? (Demand Gen, Performance)



Are there places where AI can help you extend to new audiences, accounts or regions? (ABM, Field Marketing)

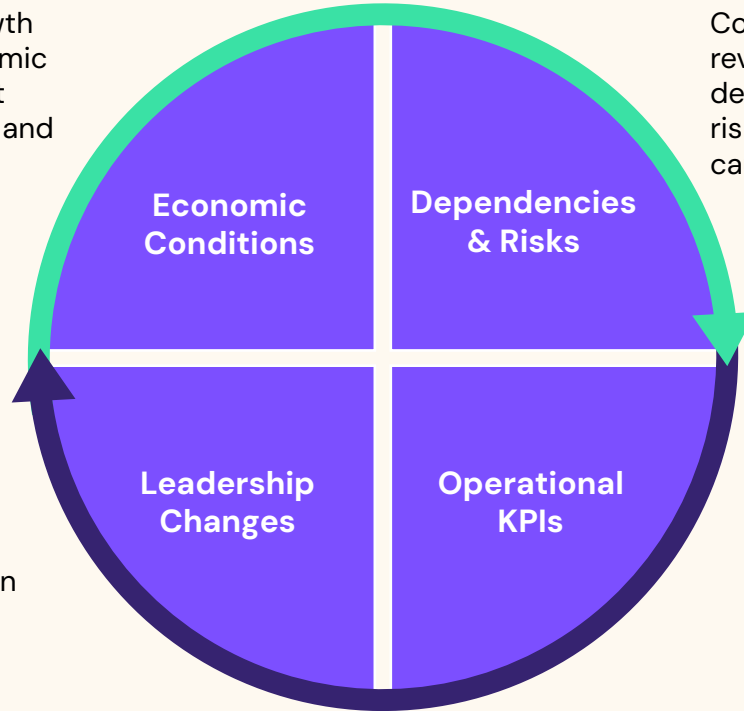


How is the effectiveness of your acquisition channels going to change in light of AI?

# Build Agility and Resiliency into your Plan

Recessions, growth periods – economic conditions affect buying priorities and cause a replan.

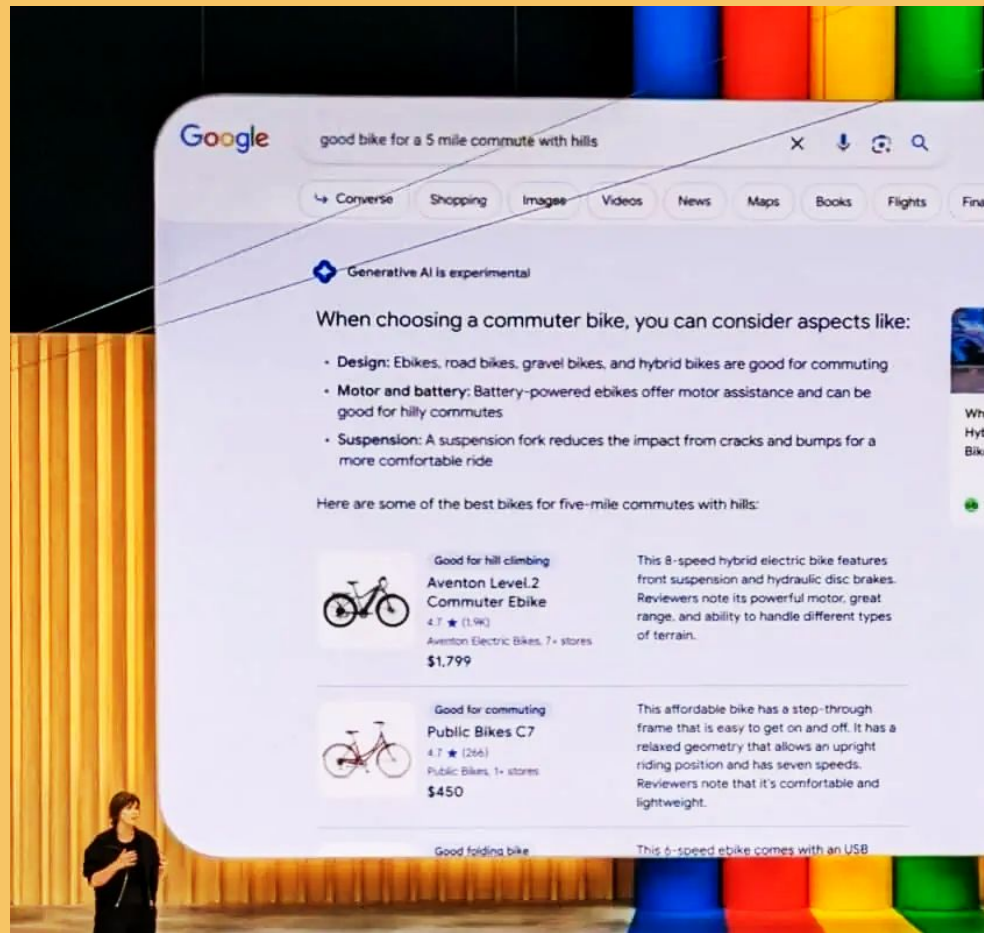
Conduct regular reviews of your dependencies and risks because they can cause a replan.



New leadership comes in and changes direction and focus, you'll need to replan.

Monitor selected marketing KPIs to ensure you're on track with your plan or you'll need to replan.

# Changes coming to search / organic acquisition





# Annual Planning with an AI Lens

## Headcount Planning



How will AI change what skills you need on your team?



Which roles can you evolve?



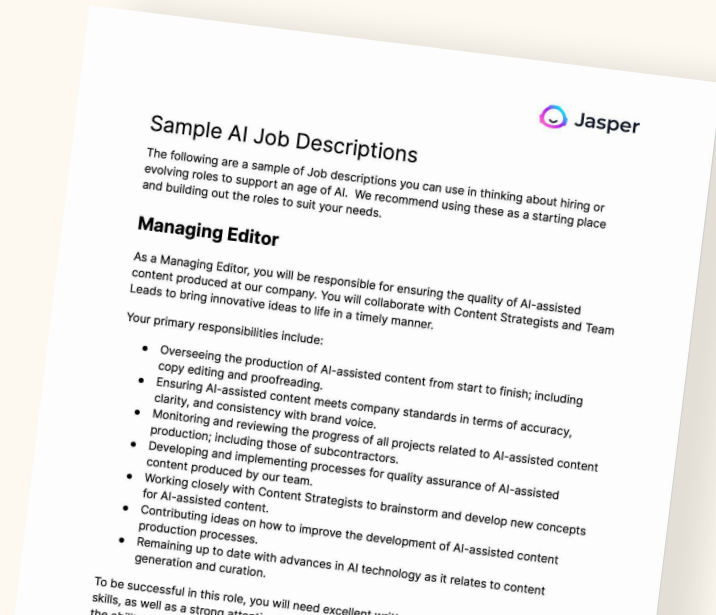
Which will you need to hire for?



How to address calls for reduced staff?

### Sample Job Descriptions

<https://bit.ly/AI-Job-Descriptions>



# Steps for building a plan

1. Select planning approach
2. Define goals
3. Apply metrics of achievement using funnels
4. Determine demand generation budget
5. Create overall budget with budget segments
6. Add in committed spend for the year
7. Assign team ownership

# Build

your plan with  
operational drivers.



# Communicate

your plan with  
commercial +  
financial outcomes!



# Financial terms



*“Generated \$2M in incremental pipeline, expected to convert to \$450,000 of incremental revenue based on historical conversion rates.”*

# Marketing speak

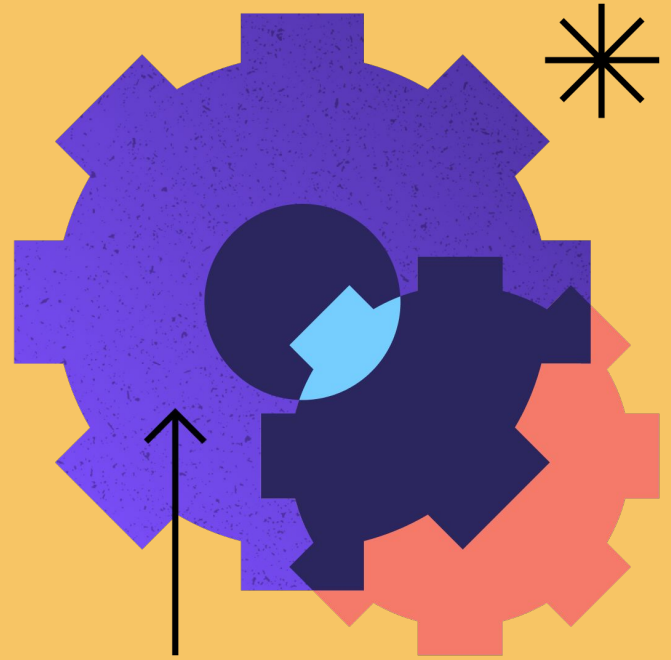


*“Email campaigns delivered 14.5% CTR. Created 4,000 MQLs in Q2.”*

# How to demonstrate marketing value

1. Focus on results, not activities
2. Show the relationship to your goals
3. Communicate value in financial terms, not marketing terms
4. Context matters, your audience won't know what a good result is
5. Tell the truth
6. Tell the WHOLE truth
7. Take the opportunity to teach, but not preach

# Tools That Can Help You



# Annual Planning in a Time of AI

**A guide and templates for incorporating AI into your 2024 strategy.**

[jasper.ai/campaigns/annual-planning](https://jasper.ai/campaigns/annual-planning)

Welcome to **Annual Planning in a Time of AI** - A free planning kit for incorporating AI into your 2024 plans in a responsible, strategic way. Unlock the potential of AI for your 2024 marketing plan. Learn new roles, policies, strategies and budgeting with Jasper's comprehensive guide.

In the dynamic landscape of marketing, AI has evolved from a novelty to a necessity. Our guide provides practical insights to seamlessly integrate AI into your team structure, policies, and strategies, without overwhelming you or your team. Your kit includes the following sections:

**Ready to make AI a strategic tool in your marketing plan?**

Our guide is specifically designed for marketing directors, vice presidents, and CMOs to help inform your annual planning season.

# Operational Marketing Index

Test your marketing planning  
& budgeting acumen

[planful.com/operational-marketing-index](https://planful.com/operational-marketing-index)

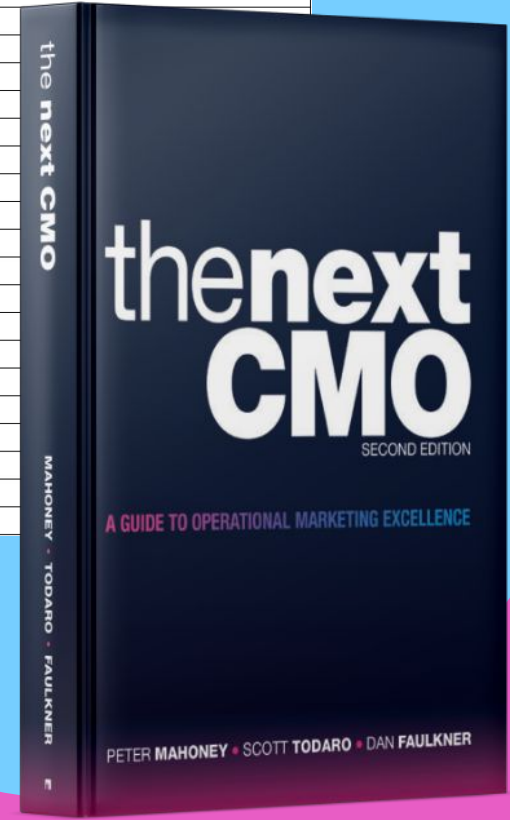




# The Next CMO: Second Edition

A Guide to Operational Marketing Excellence

Plan Element	
Situation analysis	
Market research & analysis	
Company goals	
Marketing goals	
Marketing strategies	
Target audience (including segmentation)	
Positioning and messaging	
Product and services direction and definition	
Pricing and packaging	
Competitive analysis	
Sales channel strategy	
Sales support	
Partner/channel strategy	
Product and services launches	
Campaigns	
Marketing channels (vehicles)	
Programs	
Marketing activity timeline	
Team structure, growth and responsibilities	
Technology (software)	
Budget allocation	
Testing	
Metrics of achievement	
Assumptions, dependencies, risks to success	



# Planful

- Build, execute, and measure marketing plans and budgets
- Collaborate on campaigns for pod efficiency
- Know the business value of your marketing with ROI measurement

[planful.com/marketing](https://planful.com/marketing)

The screenshot displays the Planful for Marketing interface. The top navigation bar includes 'Create', 'Manage', 'Dashboard', and 'History'. The main content area is divided into two panels. The left panel, titled 'Manage', shows a hierarchical tree view of marketing categories and their associated budgets. The right panel, titled 'Manage', shows a detailed view of an expense entry for 'Swag - Dog Treats'.

Name	Budget
Drive Growth	0
Leadership Conference Series	0
Boston Leadership Conference	0
Booth Expenses	0
Sponsorships	0
Travel	0
Paris Leadership Conference	0
San Francisco Leadership Conference	0
Product Launch	0
Martech Stack	0
<b>Grand Total</b>	<b>0</b>

**Expense Entry Details:**

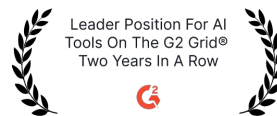
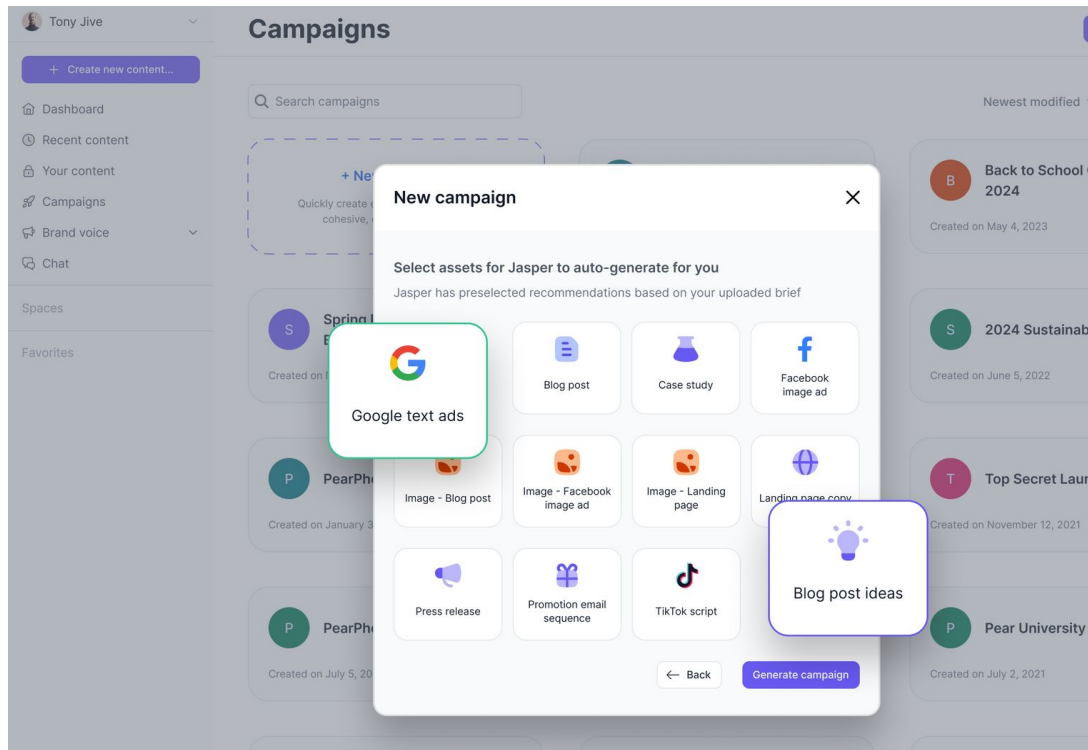
- Expense Name: Swag - Dog Treats
- Created: 19 Jul 2022, Updated: 19 Jul 2022
- Planned Amount: USD 20,000.00
- Actual Amount: 580,199.15
- Difference: (560,199.15)
- Timeframe: Q1
- Status: Closed
- GL Code: 20-000010
- PO #: 101-245
- Vendor Name: ACME Dog Treats, Inc.
- Invoice Number: 202742-1
- Source: Manual Entry
- Expense ID: E-Q1234567
- Owner: Bridges Smith
- Expense Type: PR Agency
- Delivery date: 2 Aug 2022
- Segment: Demand Gen - NA name
- Parent: Booth Expenses

**Summary:** All Expenses: 156, Grand Total: USD 441,245,678.67

# Jasper

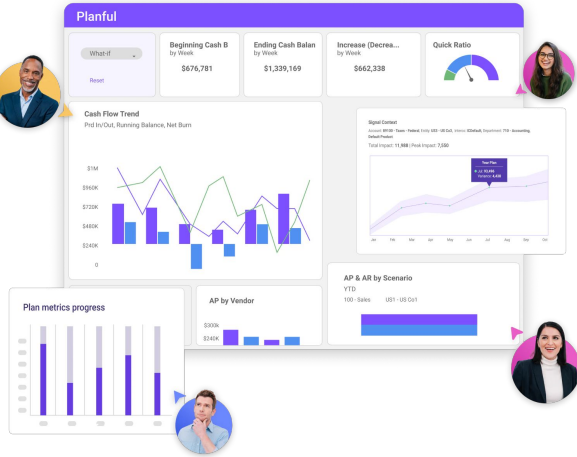
- Jasper is an AI copilot for **enterprise marketing teams** who want better outcomes, not just faster outputs.
- Accelerate content creation & collaborate on campaigns with AI. Always **matches your brand, style,** and **rooted in company intelligence.**
- Enterprise-strong foundation with advance AI controls & security.

[www.jasper.ai/book](http://www.jasper.ai/book)





# Questions?



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[planful.com/marketing](https://planful.com/marketing)