

Where Does Your Marketing Truth Live?

A 10-minute source-of-truth test for CEOs and leadership teams

HOW TO USE:

For each truth, write the exact controlling source.
Leave the box blank when the source does not exist, cannot be found quickly, or is disputed.

MANAGEMENT DISCIPLINE

How does marketing become manageable?

1 PLAN

What are we trying to achieve, and what are we doing about it?

- Enterprise and marketing strategy (PPT, DOC)
- Annual objectives, priorities, and OKRs (SaaS, XLS)
- Go-to-market roadmap and campaign calendar (SaaS, XLS)
- Approved budget and investment plan (XLS, SaaS)

2 OWNERSHIP

Who decides, approves, executes, and maintains each part of marketing?

- Marketing org chart and role charters (PPT, DOC)
- RACI, decision rights, and approval workflows (XLS, SaaS)
- Platform, data, agency, and vendor register (XLS, SaaS)

MARKET DIRECTION

What should marketing represent and prioritize?

3 CUSTOMER

Who are our customers and prospects, and what do we know about them?

- Customer and account database (SaaS)
- Lead and contact records (SaaS)
- Lifecycle stage definitions and status (SaaS, DOC)
- Purchase history and customer value model (SaaS, XLS)
- Consent and communication preferences (SaaS)

4 OFFER

What exactly do we sell, at what price, and under what terms?

- Product or service catalog (SaaS, XLS)
- Current pricing and rate cards (XLS, PDF)
- Packages, bundles, and eligibility rules (SaaS, XLS)
- Promotion, discount, and availability rules (DOC, SaaS)

5 AUDIENCE

Which customers, segments, and markets are we prioritizing now?

- Segmentation model and ideal customer profile (XLS, DOC)
- Buyer personas and key decision makers (PDF, PPT)
- Priority markets, need states, and journey maps (PPT, PDF)

6 BRAND

What do we promise, say, and show to the market?

- Brand identity and visual guidelines (PDF, SaaS)
- Positioning and value proposition (DOC, PPT)
- Messaging architecture and approved claims (DOC, XLS)
- Voice, tone, creative, and content standards (DOC, PDF)

MEASUREMENT CLARITY

How does marketing know and improve?

7 PERFORMANCE

What counts as success, and which numbers do we trust?

- KPI dictionary and calculation rules (XLS, DOC)
- Executive dashboard and funnel model (SaaS, XLS)
- Attribution and channel measurement rules (DOC, SaaS)
- Forecast, budget pacing, and ROI reporting (XLS, SaaS)

8 LEARNING

What have we tested, learned, and decided so we do not relearn it?

- Experiment roadmap, results, and conclusions (SaaS, XLS)
- Research, insights, and campaign postmortems (PDF, PPT)
- Decision log, benchmarks, and reusable playbooks (XLS, PDF)