

B2B SaaS Marketing Budget Template:

Here's How to Make the Most of it

This B2B SaaS Marketing Template will unlock the power of planning and visibility with your marketing spend. It will allow you to make sure that you spend money on the most important initiatives, and will enable you to fully execute the campaigns that are the most impactful for your company while ensuring that you fund your day-to-day operations.

Here is a breakdown of the template's different features as well as how to make sure this template creates the greatest value for your business:

Legend

Fill in your company's information for bonuses, payroll taxes, payroll service fees, and employee benefits. These values will then be automatically calculated in the Marketing Budget Template.

Marketing Budget Estimator

Enter your top-line Annual Recurring Revenue (ARR) and how many months have passed since you acquired your first paying customer. This tab will give you an estimate of how much money you should spend on your marketing function, depending on whether your company is in the [Start, Scale, or Profit](#) phase of growth.

Marketing Budget Template

This template allows you to forecast out the entire year to ensure that you can maximize impact and stay within your budget. It will also help you to keep track of your marketing spend on a per-category-basis (Demand Generation, Tavel, Trade Shows, Marketing Tech, etc.) and will also give you the ability to drill down to see how much you're spending on each subcategory (Demand Generation: Google Ads, Social Ads, Account Based Marketing, etc.), as well.

Spending Categories

Use this tab to fill out the different categories of your marketing spend:

- Column A: Fill in a list of distinct marketing categories you will be spending on (Think column A in the “Marketing Budget Template” tab e.g. Team, Trade Shows, Demand Generation, etc.).
- Column B: Fill in a list of distinct subcategories you’ll be spending money on (Think column B in the “Marketing Budget Template” tab e.g. Account-Based Marketing, Adroll, Capterra/G2 Crowd, etc.).

Monthly Spend

This tab gives you a framework to keep track of your marketing spend by aggregating your day-to-day expenses into the categories and subcategories of your marketing budget.

- Input the first date of the month in cell B2 (e.g. 1/1/2019)
- Use columns A through G to fill out the details of each transaction.
- Use the drop-down menus in each cell of columns B & C to properly categorize each transaction.
- These transactions will then be automatically aggregated in columns I through L, where you can view how you are spending vs your allocated budget. This will allow you to focus on allocating the budget to make sure your marketing function is as effective as possible.
- You can duplicate this tab for each month in the year to give yourself visibility into your marketing spend and how it is performing vs your budget.

Please enjoy this budget template! We are excited to be able to help you grow your marketing department and business. Please [Contact Us](#) to see what we can do for your business, or read our [Blog](#) to learn more.