THE PLOT FRAMEWORK

A STEP BY STEP GUIDE TO SECURING YOUR MARKETING BUDGET

Use this guide to quantify your value, tell a system level story, and turn your marketing work into a clear business case.

This guide includes:

• What you do in each phase

• Who you partner with

• What inputs you collect

• What outputs you produce

• The exact questions to ask

• Where the math lives

• How it all becomes a budget narrative

Let's begin.

P: PARTNER, DON'T PITCH

PURPOSE: Start on the same side as Finance and leadership. Before you ask for money, you need alignment on goals, definitions, measurements, and priorities.

WHO YOU PARTNER WITH:

- Finance
- Strategy
- Product
- Marketing Leadership
- Analytics / Data Teams

WHAT YOU DO IN THIS PHASE:

1. Set up a short alignment meeting (the "Pre-Flight Meeting" .
2. Communicate to your partners why you are there: to help build the business.
3. Ask key questions to gather the inputs you will need to build your business case.
4. Listen more than you talk. You are collecting the constraints and success criteria you will build toward.

QUESTIONS TO ASK YOUR PARTNERS:

- What are the most important business goals this year
- How does the business measure success
- What are the biggest risks or blockers
- How can marketing help solve these
- What proof points matter most to decision makers

WHAT YOU WALK AWAY WITH:

- Partnership and trust
- A clear understanding of the business problem
- The KPIs that matter
- Agreement on what a successful marketing contribution looks like
- A partner who feels included, not surprised

This is the foundation. Now you can move into the work that proves your value.

L: LOCATE YOUR HIGH VALUE ACTIONS

PURPOSE: Identifying your business's High-Value Actions (HVAs) is a key building block to your ultimate business case and budget proposal.

> 🗒️ *What is an HVA?*
>
> High Value Actions (HVAs) are user actions that lead to downstream value. These are the actions you want your marketing to support, amplify, or drive.

This phase has four parts:

1

MAP YOUR CUSTOMER JOURNEY

2

FIND CORRELATIONS

3

CALCULATE LIFT

4

ASSIGN FINANCIAL VALUE

Below is exactly how to do each part.

STEP L1: MAP THE CUSTOMER JOURNEY

PURPOSE:

Create a clear, shared picture of your entire customer journey, from first touch to long term loyalty.

WHO YOU PARTNER WITH:

- Product
- CRM or Lifecycle
- Analytics / Data Teams

WHAT YOU DO:

1. Write down each major action a customer takes.
2. Keep the list relatively simple and crisp. Six to ten stages is usually enough.
3. Use your company's language so all teams stay aligned as to what each stage means.

COMMON JOURNEY STAGES:

- Awareness
- Visit or app install
- Account created
- Onboarding completed
- First use
- Engagement or follows
- Subscription or upgrade
- Repeat use
- Long term retention

What you walk away with: A clean, one page map of customer behaviors. You will use this in every step that follows.

STEP L2: FIND THE CORRELATIONS

Purpose: Now that we know the behaviors, the next step is about understanding what actions have a strong statistical relationship with your long term outcomes.

Who you partner with: Analytics / Data Teams

WHAT YOU DO:

1	2	3
CHOOSE A FEW BUSINESS OUTCOMES THAT MATTER These could include: • Subscription • Customer renewal • 30 or 90 day retention • Repeat purchases • High lifetime spend	**ASK YOUR DATA PARTNERS TO RUN CORRELATION AND BEHAVIORAL MODELS** To find: • Which customer actions are most connected to those outcomes • Which actions appear earlier in the journey but signal long term value	**PICK THE TOP TWO OR THREE ACTIONS** **These are your High Value Actions.**

What you walk away with: A short list of customer actions that truly matter for long term business success.

STEP L3: CALCULATE THE LIFT

Purpose: Now that we know which behaviors matter, we need to calculate Lift, which tells us *how much* the action matters. This is a key input to understanding the monetary value of the HVA itself.

Who you partner with: Analytics / Data Teams

WHAT YOU DO:

Compare users who perform the HVA (Group A) vs. users who do not (Group B)

Calculate how much more likely Group A is to take the next step in the customer journey vs. Group B.

Convert this into a simple statement your leadership will understand.

EXAMPLE STRUCTURE:

"Users who do X are Y times more likely to do Z"

"Users who add a favorite channel are 2.4X more likely to subscribe to our paid product".

What you walk away with: Clear, powerful sentences that prove the value of each behavior.

STEP L4: ASSIGN FINANCIAL VALUE

Purpose: Translate each HVA into a real dollar amount. After we land this, we are on our way to a solid business case!

WHO YOU PARTNER WITH:

- Finance
- Analytics / Data Teams

WHAT YOU DO:

1 Ask your partners to look at several years of behavioral data.

2 Compare groups of users who performed each HVA.

3 Calculate how much long term value each HVA produces.

4 Come to agreement on a dollar figure for each action (e.g. "A customer favoriting a channel is worth $XX in long-term value to the business".

What you walk away with: A table of customer behaviors, each with a clear financial value. This becomes the core of your budget request.

STEP 0: OUTLINE THE IMPACT

Purpose: This phase connects your marketing activity to the HVAs you identified, allowing you to take credit for business growth that is attributed to marketing.. It is where the business case really starts to takes shape.

This phase has three parts:

1. ANALYZE MARKETING CHANNEL	2. CLUSTER AND PRIORITIZE	3. VALIDATE WITH EXPERIMENTS

4. MODEL THE TOTAL VALUE CREATED

STEP 01: ANALYZE MARKETING CHANNELS

Purpose: Understand which of your marketing channels occur before an HVA takes place.

Who you partner with:

- Marketing Channel and Media Teams

- Analytics / Data Teams

WHAT YOU DO:

As your Analytics / Data Teams to analyze all of your marketing channels

Identify which touchpoints occur before an HVA takes place

List out all of the potential HVAs that come up in the analysis

> **What you walk away with:** A list of marketing channels that are *likely* driving HVA (which we will validate in Step O3).

STEP 02: CLUSTER AND PRIORITIZE

Goal: Decide which HVAs marketing should own.

Who you partner with:

- Marketing Channel and Media Teams
- Analytics / Data Teams
- Product

WHAT YOU DO:

Score each HVA on two dimensions:

1. VALUE TO THE BUSINESS	2. ACHIEVABILITY THROUGH MARKETING

Use a simple scale:

1 = low   **2 = medium**   **3 = high**

> ☐ **What you walk away with:** A short list of HVAs that marketing can realistically move and that will meaningfully impact the business.

STEP 03: VALIDATE WITH EXPERIMENTS

Goal: Prove which marketing actions actually cause HVAs, not just correlate with them.

Who you partner with:

- Marketing Channel and Media Teams
- Analytics / Data Teams
- Product
- Finance

WHAT YOU DO:

1. LIST YOUR MAJOR MARKETING ACTIONS

Examples:

- Paid social
- Video ads
- Email
- SEO content
- Creator partnerships

2. TEST EACH ACTION WITH CONTROLLED EXPERIMENTS

Test each marketing action by running controlled experiments. This means showing the action to one group and withholding it from another so you can see the true incremental lift it creates. It helps you separate what actually drives behavior from what only appears to.

3. MEASURE THE INCREMENTAL LIFT EACH ACTION PRODUCES

Measure the incremental lift each action produces by comparing how often the HVA happens in the test group versus the control group. The difference between the two is the real impact of your marketing, not the part that would have happened on its own.

YOUR OUTPUTS:

A list of validated tactics

Their proven lifts

Their cost per action

STEP 04: MODEL THE TOTAL VALUE

Goal: Show Finance and leadership how your validated tactics scale into real dollars.

Who you partner with:

- Analytics / Data Teams
- Finance

WHAT YOU DO:

From our previous analysis, we know how much each HVA matters (e.g. lift), and their financial value. Now, we just apply a reasonable campaign reach forecast using this formula:

> **Incremental Lift x Reach x HVA Value = Total Value Driven**

Calculate:

1 How many HVAs each tactic will generate

2 The total financial value that creates

3 Subtract the associated cost to produce that value (e.g. your media budget)

4 Voila! The net gain to the business

WHAT YOU WALK AWAY WITH:

A simple table that shows:

- Value created by marketing, per marketing tactic
- Costs (e.g. the budget you need)
- Net gain to the business

This is the backbone of your budget story.

STEP T: TELL THE STORY

This is where the math becomes the narrative.

Purpose: Present a clean, confident, easy to tell story that shows why marketing is an investment in business growth — not a cost. Surround all the data and numbers you just generated with the elements that make marketing *marketing* (e.g your new brand spot with refreshed messaging, or your latest influencer campaign for socials).

Who you partner with: This is you presenting to Finance. OWN IT!

WHAT YOU DO:

Tell the story.

YOUR NARRATIVE STRUCTURE:

1 — We partnered across teams to understand the business goals

2 — We mapped the journey

3 — We identified our High Value Actions

4 — We measured their correlation and lift

5 — We assigned dollar values to each one

6 — We validated which marketing actions drive those behaviors

7 — We modeled the value that marketing is driving at scale

8 — We identified the net gain we can drive to the busines

9 — Here is what we need to get it done (your budget ask)

🗨 **Your final line should sound like:**

"With an investment of $XXX, we will generate X dollars in long term value for the business."

CONGRATS!

You are no longer asking for a budget. You are presenting an investment case.

Now go out and secure the bag.