

Chapter 22: Every Dollar Has a Job

Table Reference

Every table from this chapter, with what it's for and how to actually use it.

Annual Budget Planning & Allocation Framework

Activity Type / Channel	Q1 Budget (\$)	Q2 Budget (\$)	Q3 Budget (\$)	Q4 Budget (\$)	FY Total
Field Events / In-Person					
Virtual Events / Webinars					
Content / Inbound (Production)					
Paid Digital / SEM					
Email / Nurture					
Partner / Channel					
SDR Outbound (Tools & Sequences)					
ABM / Intent Platform Fees					
Agency & Contractor Fees					
Technology / Tools (MarkOps Stack)					
Contingency Reserve					
TOTAL					

Description: A blank quarterly budget-planning worksheet pre-populated with the core spend categories (field events, paid digital, ABM/intent platform fees, and others).

How to use it: Populate each planning cycle to build your actual annual budget allocation, broken out by quarter and channel.

Monthly Spend Tracking & Variance Reporting

Activity Type	FY Budget	Jan	Feb	Mar	Apr	May	Q1 Variance
Field Events / In-Person							
Virtual Events / Webinars							
Content / Inbound							
Paid Digital / SEM							
Email / Nurture							
Partner / Channel							
SDR Outbound							
ABM / Intent							
Agency / Contractor							
Tech / Tools							
Contingency Used							
TOTAL							

Description: A blank monthly tracker for logging actual spend against budget by channel, with variance calculated automatically.

How to use it: Update monthly from Finance/AP actuals – a channel running consistent negative variance is your earliest signal something needs reallocating.

Cost-per-Outcome: Cost per MQL by Channel

Activity Type	Q1 Cost/MQL	Q2 Cost/MQL	Q3 Cost/MQL	Q4 Cost/MQL	FY Avg / Benchmark
Field Events / In-Person					
Virtual Events / Webinars					
Content / Inbound					
Paid Digital / SEM					
Email / Nurture					
Partner / Channel					
SDR Outbound					
ABM / Intent Platform Fees					
Agency & Contractor Fees					
Technology / Tools (MarkOps Stack)					
OVERALL AVG					

Description: A blank quarterly tracker for cost-per-MQL by channel, benchmarked against a full-year average.

How to use it: Populate each quarter to see which channels are actually efficient at producing MQLs, not just which ones produce the most volume.

Cost-per-Outcome: Cost per Meeting by Channel

Activity Type	Q1 Cost/Meeting	Q2 Cost/Meeting	Q3 Cost/Meeting	Q4 Cost/Meeting	FY Avg
Field Events / In-Person					
Virtual Events / Webinars					
Content / Inbound					
Paid Digital / SEM					
Email / Nurture					
Partner / Channel					
SDR Outbound					
ABM / Intent Platform Fees					
Agency & Contractor Fees					
Technology / Tools (MarkOps Stack)					
OVERALL AVG					

Description: The same cost-efficiency tracking as above, one funnel stage further down – cost per booked meeting by channel.

How to use it: Use alongside the Cost/MQL table – a channel efficient at MQLs but expensive per meeting points to a lead-quality problem, not a volume problem.

Budget Reallocation Log

Date	From Channel	To Channel	Amount (\$)	Rationale / Data	Approved By	Status

Description: A blank log for recording every mid-quarter budget reallocation, with the data-backed rationale and formal approval.

How to use it: Log every reallocation here at the time it happens – this is what turns “we moved some budget around” into a defensible, auditable decision trail.

Marketing-Finance Cadence

Cadence	Meeting / Deliverable	MarkOps Provides	Finance Provides
Monthly	Budget reconciliation	Spend tracker actuals by channel; reallocation log entries	AP/GL actuals by cost center; confirmation of accruals or reclassifications
Quarterly	QBR budget section	Cost-per-outcome by channel; full-year spend vs. plan; reforecast for remaining quarters	Approved budget by cost center; any Finance-initiated budget adjustments

Cadence	Meeting / Deliverable	MarkOps Provides	Finance Provides
Annual	Budget planning submission	Prior-year ROI by channel; proposed FY budget allocation with WIG-backed rationale	Approved total marketing budget envelope; cost center coding structure for new FY
Ad hoc	Reallocation approval	Reallocation request with performance data and business case	Confirmation of coding change; updated forecast

Description: Defines the recurring Monthly/Quarterly/Annual touchpoints between MarkOps and Finance, with exactly what each side is responsible for bringing.

How to use it: Use as the literal agenda-setting document when establishing or auditing your own MarkOps-Finance working relationship.

Finance Partnership Reference

Field	Value
Finance Partner	
Budget Tool / System	e.g. Adaptive Insights, Anaplan, Google Sheets, NetSuite
Cost Center Structure	
Approval Threshold	e.g. Reallocations > \$5,000 require CMO sign-off
Accrual Policy	e.g. Commitments > \$X accrued in the month incurred
Current Status	☐ Not Started ☐ Tracking Informally ☐ Formalized ☐ Integrated with Finance System

Description: A quick-reference worksheet for documenting your own Finance partner, budget tool, and cost center structure.

How to use it: Fill in once and keep current – this becomes the answer key for anyone new to the team asking “who do I talk to about budget.”
