



Owner's Manual for the Modern Demand Gen Engine

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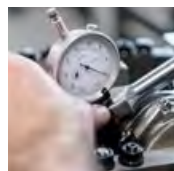
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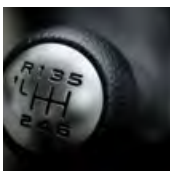
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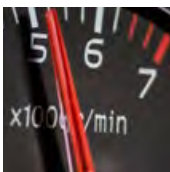
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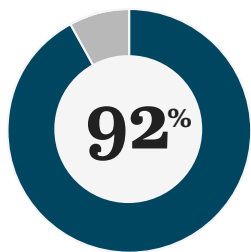


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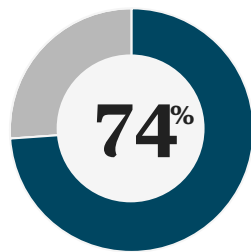
Introduction

“Everything we know about demand generation is changing”

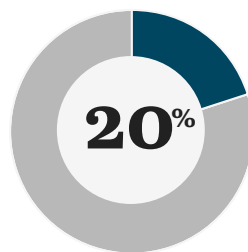
—at least, that’s how it feels some days! The channels we use are shifting in significant ways.



92% of the most successful marketers prioritize quality over quantity¹



74% of people say they use Facebook for professional purposes²



20% of mobile searches are voice searches³

¹ <https://contentmarketinginstitute.com/2017/03/top-technology-marketers-research/>

² <https://www.hubspot.com/marketing-statistics>

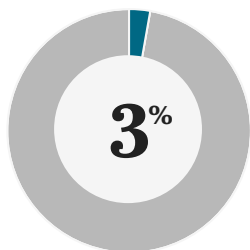
³ <https://searchengineland.com/google-reveals-20-percent-queries-voice-queries-249917>

That said, we’ve written this e-book, in part, to assure you that despite changes in the channels we use to communicate, the fundamentals remain steadfast.

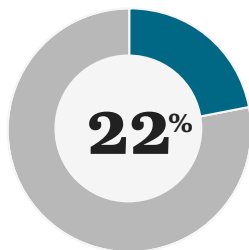
- We still have to deeply understand our buyers.
- We have to create emotionally compelling offers that attract distracted business people.
- We have to package our communications to support the entire purchase journey. Top-of-funnel “content marketing” alone is not enough to maximize revenue opportunities.

With all the glamor of a high-growth category, the martech space has left us with the illusion that a marketer’s jobs has somehow gotten easier. Sure, we’ve got more channels to work with and there’s more and better tech to leverage. And yet these same advances can make our jobs even more challenging.

The fact is that:



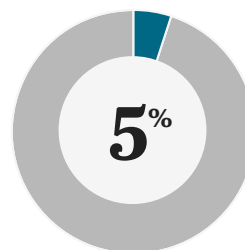
Only 3% of marketers get full value out of their tools.⁴



Buyers don't read their email. From 2017⁵ to 2019⁶ email open **rates are completely stagnant at 22%.**



The average B2B cost per action for **Google Ads** has risen to **\$116.13.**⁷



Buyers hold their own information close. **The top 10% of marketers have an opt-in rate of less than 5%.**⁸

There's a lot of distraction in our field. And there are growing performance pressures. With our collective reality as the backdrop, this e-book aims to cut through all the noise. We want to offer a comprehensive set of how-to steps for building an effective demand generation strategy that scales—no matter what is being shouted about in this wonderful chaos of B2B possibility.

⁴ <https://chiefmartec.com/2016/11/state-marketing-technology-2017-hint-best-breed-big/>

⁵ <https://www.mediapost.com/publications/article/300974/study-average-email-open-rate-across-industries-i.html>

⁶ <https://www.getresponse.com/resources/reports/email-marketing-benchmarks>

⁷ <https://www.wordstream.com/blog/ws/2016/02/29/google-adwords-industry-benchmarks>

⁸ <https://sumo.com/stories/email-signup-benchmarks>



Part 1

Document Your Ideal Customer Profile (ICP)

Document Your Ideal Customer Profile (ICP)

The inbound marketing movement did many valuable things for marketers. It recognized that buyers (not sellers) drive the purchase process.

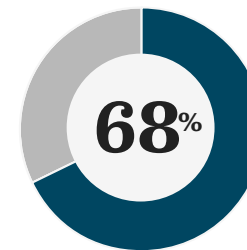
It taught us to attract our audience using engaging content. Inbound approaches are still important because, after all, attracting people to us is far more effective than blindly cold calling. Yet in our quest to provide self-service buyer discovery, many programs got swept up in attracting large audiences while de-emphasizing the focus on finding buyers that will convert to customers.

While it's exciting to educate large numbers of people, you have to close business to succeed. Thus our demand generation dollars must be focused on those who we're truly able and likely to serve. Clear identification of your company's ideal customer profile (ICP) is a foundational step in building success for all your marketing programs.

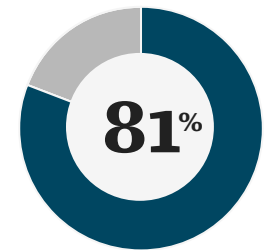


To build an ICP, your company must document which types of organizations you are best able to serve. Who will get the most value from what you sell and who is likely to recognize the value you offer?

Begin by assembling the necessary firmographic and technographic elements that identify a potential client you can serve. To maximize performance, add in behavioral elements such as purchase intent data. To activate your program, include specifics on the roles and functions required to gain acceptance.



Organizations that have developed a strong ICP **average a 68% higher account win rate.**⁹



81% of top-performing organizations are confident that their ICP represents their ideal accounts⁹

⁹ <https://blog.topohq.com/5-benefits-of-creating-an-ideal-customer-profile/>

Firmographic information—Focus on organizations that need your product, can readily adopt it without overly disruptive changes and for whom your product or service will drive an easily articulated business impact.

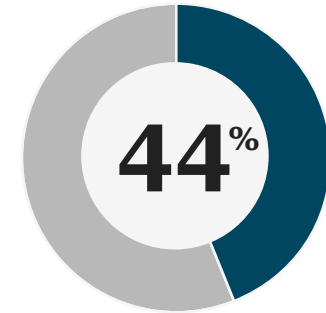
Identify these core data points:

- Company size
- Industry
- Geographic location
- Other factors (i.e. public vs. private, recently acquired, growth rate, etc.)
- Technology currently deployed
- Intent drivers—Identify those organizations in an active purchase process.
- Look for things you can track with first or third-party data)
- Purchase triggers (What actions or circumstances trigger a purchase?)
- Type of content being consumed
- Reading product reviews
- Number of people consuming content

Buying committee membership—While account information can identify which businesses to target, it's always specific people who execute a purchase. As such, ICP documentation shouldn't stop at account information alone. The extra step of articulating buying groups will be essential to guiding both your content and your tactical deployment. Within the buying groups determine the:

- Title/role of important members of your buying committee
- Level/seniority of the individuals you need to engage

¹⁰ <https://www.marketingcharts.com/industries/business-to-business-81535>



44% of B2B marketers want to collect prospective buyer behavior in order to boost engagement and messaging¹⁰



A fourth and quite advanced factor you'll want to consider is demand maturity. How familiar is the audience with the concepts you will be communicating? While demand maturity plays a lesser role in overall database build-out, it's incredibly important in determining what you need your marketing to accomplish. It informs how you'll message in your content and how you'll set management expectations around program design and measurement.

Which of the following descriptions most aligns to your own target market?

- **Latent demand**—For a lucky minority of solutions, pent-up demand already exists that can't easily be filled by alternatives. If companies are truly already craving what you offer, building clear awareness of your benefits will accelerate penetration

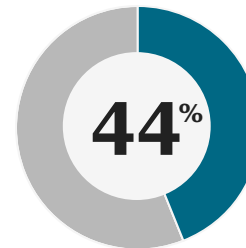
and adoption ahead of competitive entrants. While situations like this do exist, they are relatively rare in the B2B world. Be careful not to confuse your own excitement with the true perceptions of your target market.

- **Mature demand**—Mature demand happens when buyers are well-educated on the value of a solution, and they are looking for ways to optimize their approach. There are some easy ways to determine if your solution is in a state of mature demand. Consider if there's already plenty of competition in your

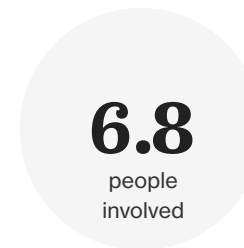


category, if your strategy requires conversion from an already-present alternative, or if price is a major driver of purchase. If so, you're likely to be dealing with mature demand. You're lucky, in that budgets for what you do will be present in your ICP companies. The challenge is that you will need to convince your audience that they will be better served by your solutions.

- **Nascent demand**—Successful new category introductions depend on the existence of nascent demand. In a market like this, potential buyers will not be familiar with how you can help them, so you'll need to invest significant effort in educating them about your alternative. And since budgets will not have been allocated for what you provide, (because you're introducing a new concept to the status quo), you will need to bring about their creation. Success in a nascent market requires successful positioning of both your solution and your



44% have formal buying groups or committees that review purchases¹¹



Number of people involved in **B2B solutions purchases is 6.8**¹²

company. To overcome any company's

change-averse inertia, you'll need to provide substantial evidence validating your claims about the solution and the company it comes from. For example, while "freemium" software trials can get customers to try what you do at a small scale and at low risk, their requirements and expectations grow dramatically when you ask them to commit to a significant average contract value (ACV).

¹¹ <https://www.forbes.com/sites/allbusiness/2019/05/24/b2b-sales-tips/#520a82f0329d>

¹² <https://hbr.org/2017/03/the-new-sales-imperative>

To bring these concepts to life, let's take a look at a sample ICP that most of us can relate to: office coffee machines.

If you were selling specialized office coffee machines you would be entering a mature demand market and your ICP might look something like this:

Company size	While everyone enjoys a convenient cup of coffee, an office should have at least 40 employees to justify the investment in a specialized coffee machine vs. the well-known offerings available at any office store.
Industry(ies)	<p>Likely industries will be those where the employee base is in the office most of the time rather than working from home or on the road:</p> <p>For example:</p> <ul style="list-style-type: none">• Education• Retail stores• Warehouses• Scientific Labs
Geographic location	Since these machines require installation and regular maintenance and our service staff are currently restricted to the New England region, we need to limit ourselves right now.
Other factors (i.e. public vs. private, recently acquired, growth rate, etc.)	Companies experiencing rapid growth are particularly good targets for our products because staff often work long hours.

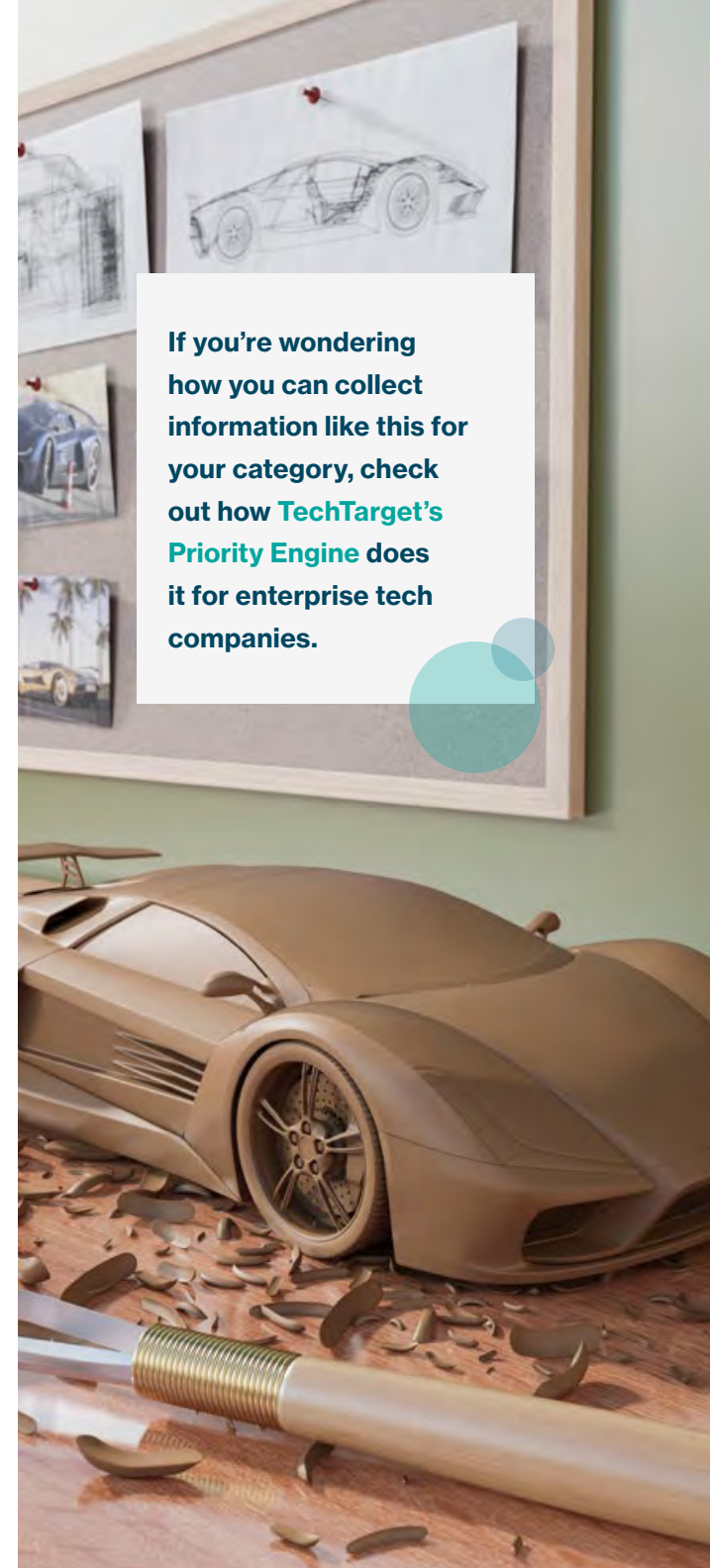
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Solution currently deployed (technographics)	<p>List out the possible existing solutions and why they would be ripe for replacement. For example, anyone with a single cup Keurig-style coffee machine is likely ready for an upgrade.</p> <p>You may also consider the presence of other drink dispensers as a positive sign: If someone has a Bevi, smart water machine, they may be more likely to purchase advanced coffee equipment.</p>
Purchase trigger (s)	Information like spikes in new job opportunity listings or new office location announcements show that a company is growing.
Type of content being consumed	Are individuals reading about the role of caffeine and office productivity? Have they been downloading buyer comparison guides?
Reading product reviews	Are individuals at the company reading product reviews of your product or that of your competitors?
Buying groups	Who will be influencing the purchase of new coffee equipment? Might there be an activities committee or wellness director you can target? Did a new office manager join the company?
Number of people consuming content	Are more people at the organization searching for information about coffee machines than have done so in the past?

If you're wondering how you can collect information like this for your category, check out how [TechTarget's Priority Engine](#) does it for enterprise tech companies.





Part 2

Map Content to the Buyer's Journey

Map Content to the Buyer's Journey

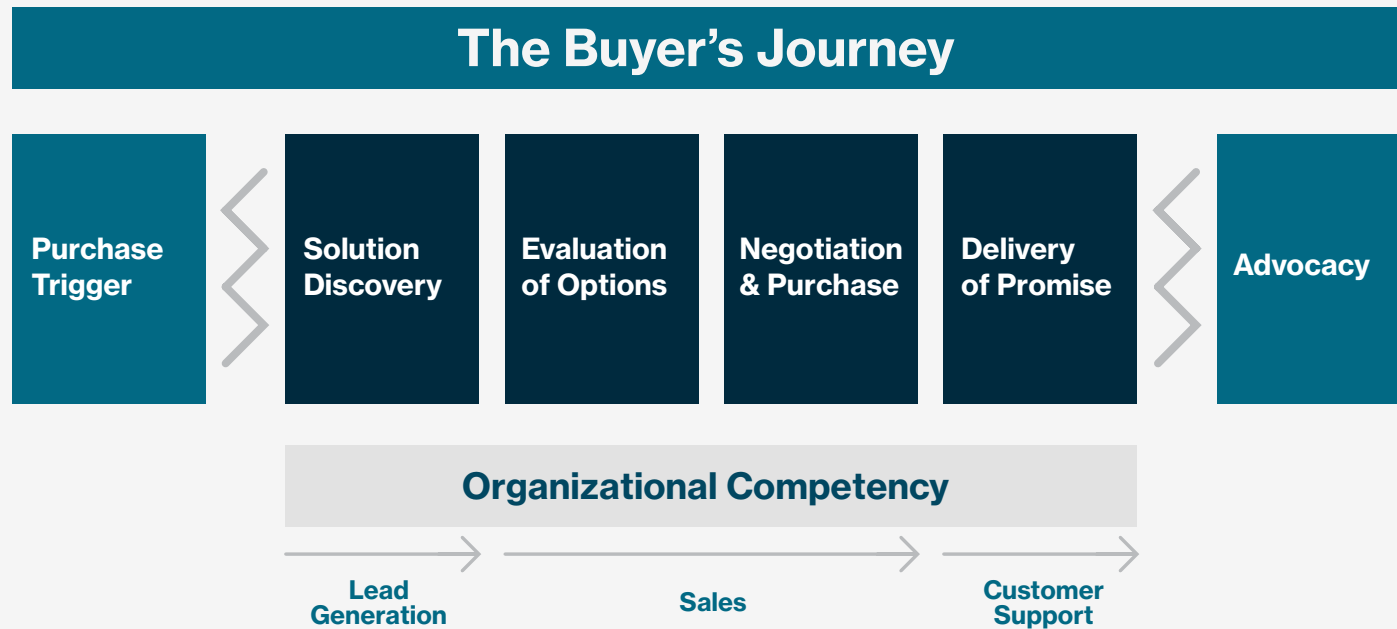
Given the availability of information today, as marketing communicators we have very little control over exactly how our buyers evaluate and select products. That said, our sales teams are constantly reaching out, and we can and should have a lot of influence on how sales engages buyers during the buyer's journey.

Making progress with conversion along the buyer's journey begins with understanding it better, documenting it and diagnosing breakage points. Rudimentary top, middle and bottom-funnel

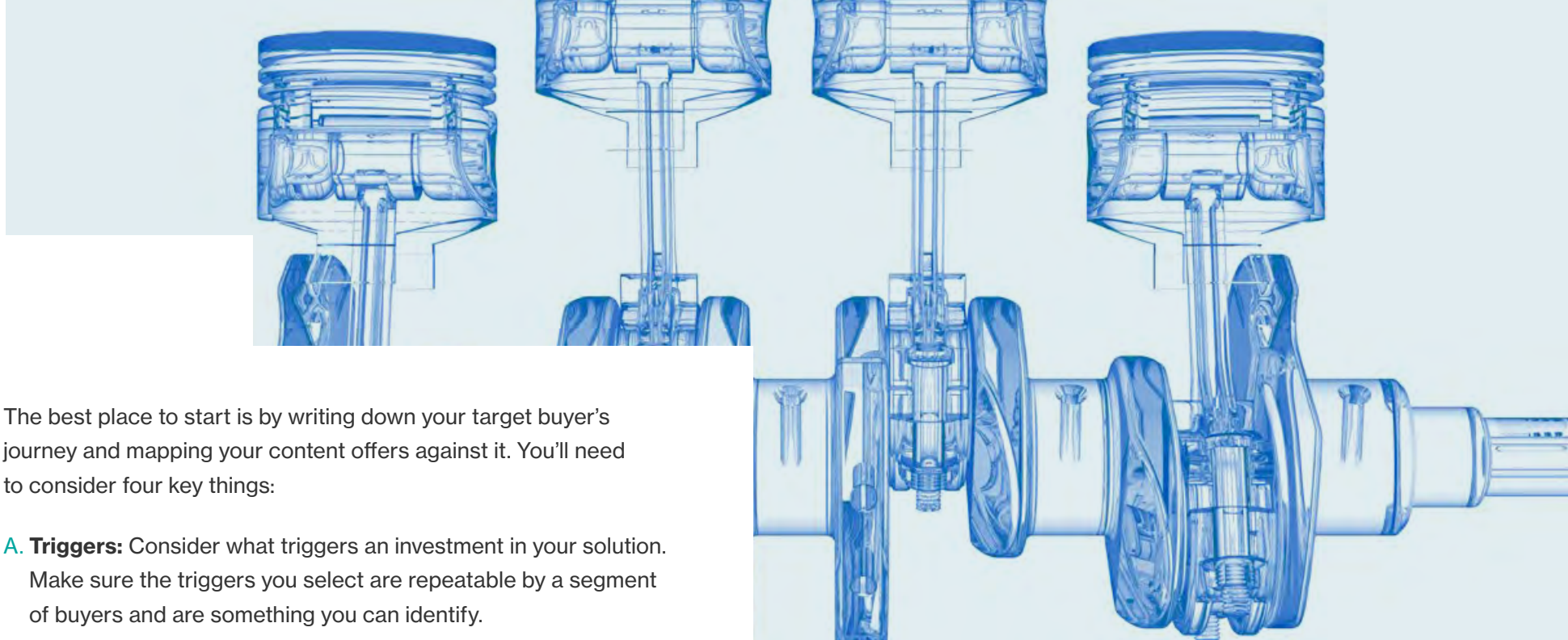
thinking can't get you the clarity needed to achieve breakthroughs. You have to go deeper. You need to examine the specific questions buyers are trying to get answered at each stage of their process. Buyers are proven to convert faster when we help them fulfill their information needs. And the better our assistance, the more we can shape their opinion of us. This principle applies to each member of the buying team. Concentrating on a single primary champion leaves the needs of their internal constituents unmet and therefore open to alternatives.

Optimize Content to Facilitate the Buyer's Journey

How your customers and prospects buy is often fundamentally different from how you organize. For many companies this conflict can create significant gaps, especially as it relates to content. Understanding the buyer's journey will help you identify unique needs by stage and optimize content to facilitate this journey. The below journey shows how your competencies can better align to buyer needs and gives you insight into what they seek from pre-purchase through post-purchase.

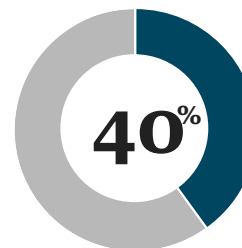


Source: *Unleash Possible: A Marketing Playbook That Drives Sales*

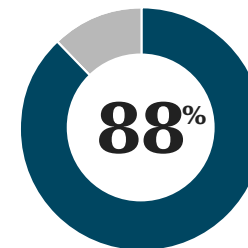


The best place to start is by writing down your target buyer's journey and mapping your content offers against it. You'll need to consider four key things:

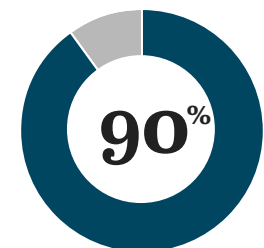
- A. Triggers:** Consider what triggers an investment in your solution. Make sure the triggers you select are repeatable by a segment of buyers and are something you can identify.
- B. Segments:** Identify which of your buyer roles are likely to encounter this trigger.
- C. Questions:** Identify what questions your buyers will want to answer in each stage of the journey. I've provided some generic questions in the sample below, but you will want to get very specific to your organization.
- D. Offers:** Map your current content to the questions and personas you're seeking to attract. Don't force fit your mapping. If you have gaps, and you likely will, it provides a prioritized list of items to add to your editorial calendar.



40% of B2B buyers say that they **consume between 3 and 5 pieces of content** before engaging with a salesperson.¹



88% agree that content producers need to **focus less on product specifics** and more on value.¹



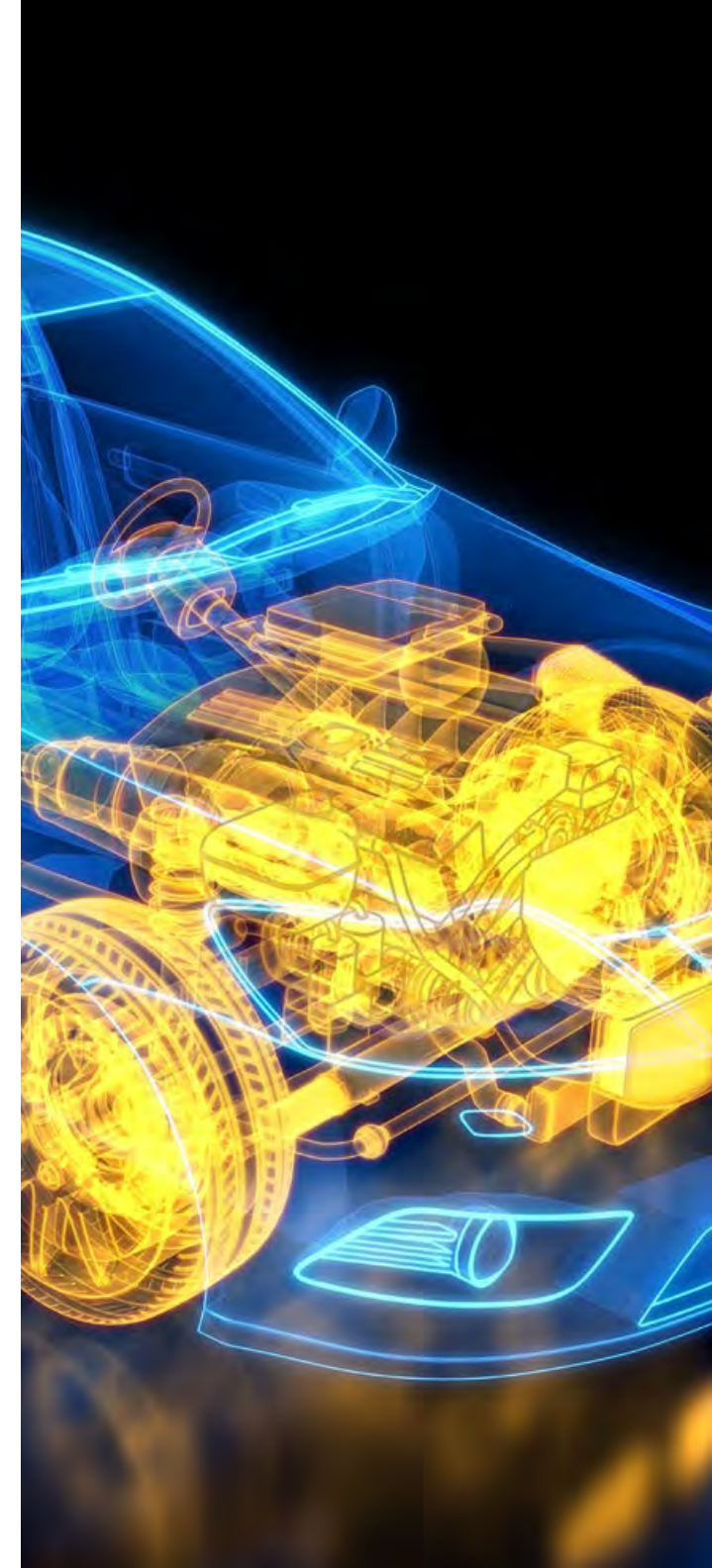
90% of B2B buyers say **online content has a moderate to major effect** on purchasing decisions.²

¹ <https://www.demandgenreport.com/resources/research/2018-content-preferences-survey-report>

² <https://www.themarketingblender.com/statistics-every-b2b-company-know-boost-sales/>

Audience	Purchase Trigger	Stage of Buying Cycle	Questions
Profile 1	Purchase Trigger #1	Problem Identification	What are my peers who are most effective doing? What trends are hot in my industry? How do I compare to my peers?
		Solution Evaluation	How can I address this challenge? What is the difference in costs for the various approaches? What will I need to address this challenge a year from now? Which vendors offer the features that are important for my business?
		Vendor Comparison	Do they Have a good reputation for support after purchase? Has my sales person been responsive? Do I feel important to this vendor?
		Negotiation	How do I build a business case for budget approval? Will this vendor be the best long-term choice? What references can I speak with?
Profile 2	Purchase Trigger #2	Problem Identification	Add additional relevant questions.
Profile 3	Purchase Trigger #3	Problem Identification	
Profile 4	Purchase Trigger #4	Problem Identification	

Source: Unleash Possible: A Marketing Playbook That Drives Sales



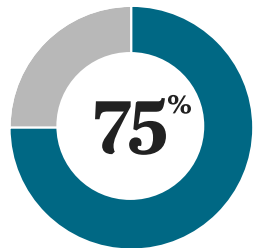
For example, if I were marketing plows to commercial property managers, the purchase triggers and questions might look like this:

Purchase Trigger	Problem Identification Questions
Heavy snow weather forecast for the entire winter season	<ul style="list-style-type: none"> • Will the projected snowfall occur in a small number of large storms or in many small storms? • Is snow expected to be accompanied by ice and wind or mild temperatures? • Are other property management companies soliciting my customers with promises of new equipment? • In heavy snowfall scenarios, how quickly do commercial clients expect snow removal to occur? • How can I assess whether my current equipment will be able to manage the expected workload? • How much staff should I hire in preparation for the season?
Cost of fuel dropped more than \$1/gallon	<ul style="list-style-type: none"> • How are other commercial property management companies investing their fuel savings? • How long are fuel prices expected to stay low? • Prices based on dropping fuel costs? • Are other property managers changing their prices based on dropping fuel costs?

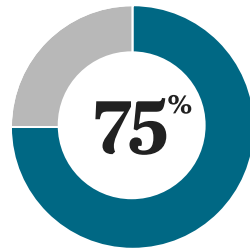




Studying what roles and functions have typically engaged with you provides a start. Your sales colleagues can provide insight about exactly who has been involved in both fast moving deals on the one hand and troublesome ones on the other. Product marketing and customer success can enrich your view further. And 3rd-party sources can potentially provide a market-back objective view of who does research in your category. Simply put, you're looking to identify the critical players in a buying committee at the different journey stages. What buying tasks or selection criteria must be completed before the journey can move forward. Map your content in terms of what questions each will want answered based on their persona and their actual behavior. Think hard about what subject lines, headlines and abstracts are likely to resonate with them based on their information needs.



75% of buyers agree that vendors should **use more data & research to support claims made in their content.**³



75% of customers agree or strongly agree that **their purchase involved people from a wide variety of roles, teams and locations.**⁴

“Good content” requires a comprehensive, objective evaluation approach

Content can be good or bad on so many levels. From a brand perspective, you always have to have an eye on how your company looks and feels in public. But no matter how good something looks, no matter who on your extended team likes it, if it doesn't perform on a variety of critical measures, it isn't doing the job you need it to. And since performance declines with time, you need to maintain a process capable of continuously monitoring it. Here too, to improve your demand generation strategy going forward, you'll first want to take a look back at how you've done. You'll want to establish clear baselines so you can prioritize what you need to focus on going forward.

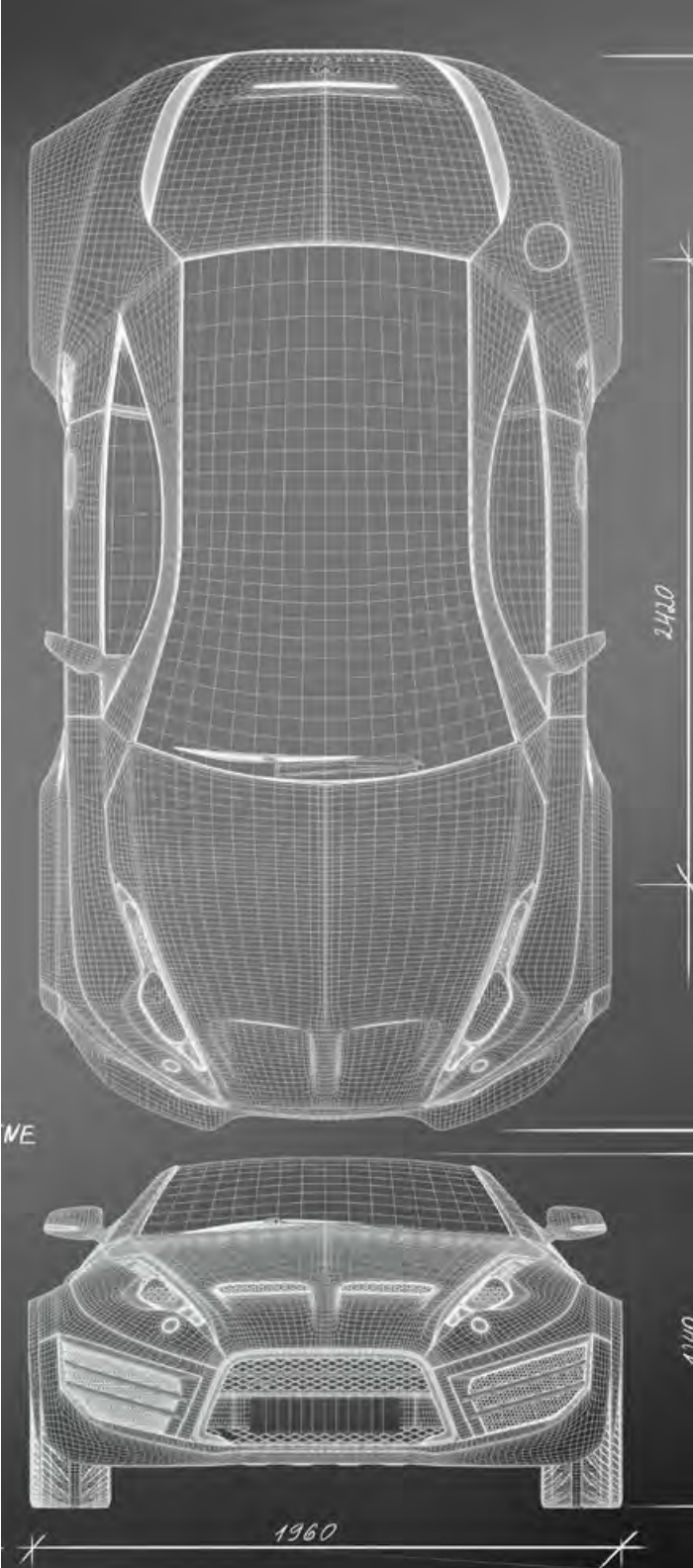
³ <https://www.demandgenreport.com/resources/research/2018-content-preferences-survey-report>

⁴ <https://www.gartner.com/smarterwithgartner/what-sales-should-know-about-b2b-buyers-in-2019/>

Establishing digital and email marketing baseline metrics

Metric	Description	Your Average Measurement	
Unsubscribe rate	Looking back 12 months, what is your email unsubscribe rate?		
Email open rate	Looking back 12 months, what is your average email open rate?		
Email click-through rate	Looking back 12 months, what is your average email click through rate?		
Top-10 assets	Your assets:	# of views	# of shares
	1.		
	2.		
	3.		
	4.		
	5.		
	6.		
	7.		
	8.		
	9.		
	10.		

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Metric	Description	Your Average Measurement
Unique visitors vs. return visitors	What % of your website visitors come back?	
SEO ranking	What is the ranking of your top-10 keywords? 1. 2. 3. 4. 5. 6. 7. 8. 9. 10.	Page rank <i>Workspace for Your Data.</i>
New subscribers	How quickly are new email subscribers joining your database?	





Part 3

Audit Your Demand Generation Success

Audit Your Demand Generation Success

To prepare for a performance improvement push, create project space for taking a fresh, objective look at the demand generation results you've achieved to date. With your Ideal

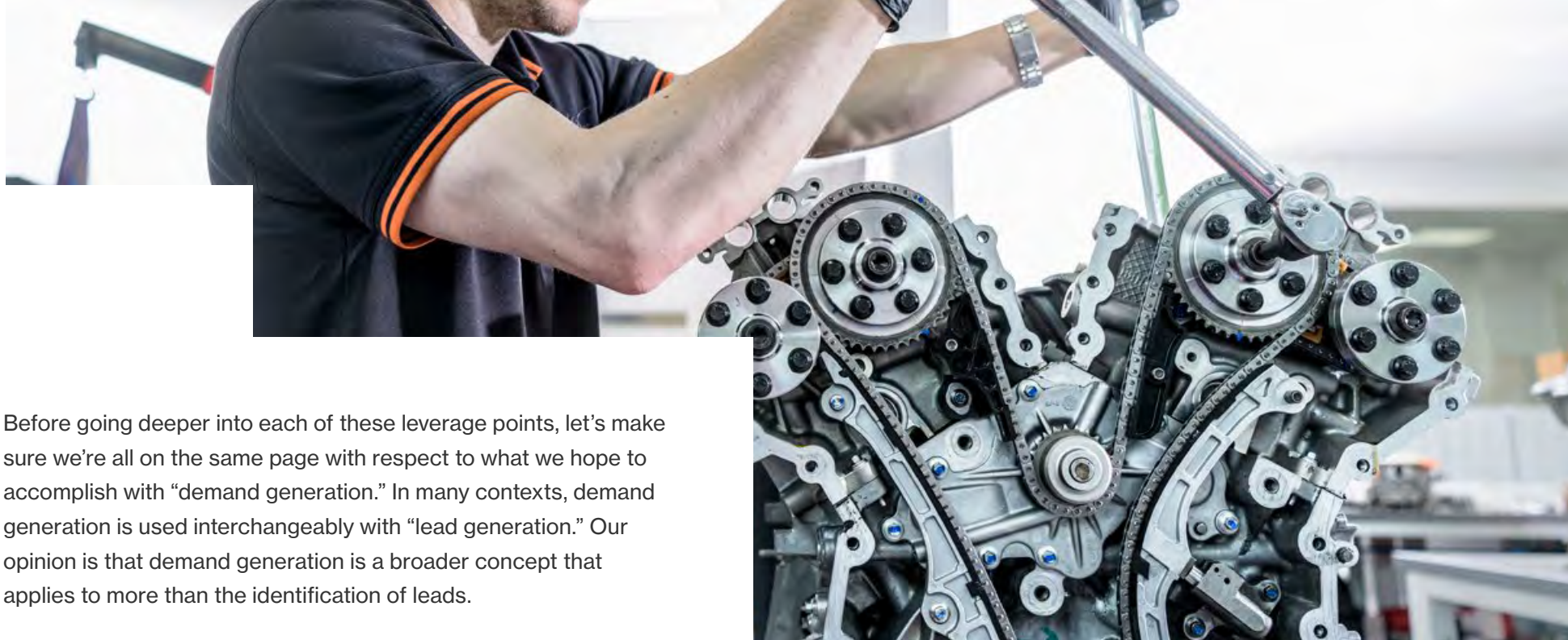
Customer Profile (ICP) work underway, establish where change is needed by evaluating your current capabilities:

- **ICP coverage.** Out of all the possible appropriate targets, what percent of these ideal companies are actually well-represented in your database?
- **Data integrity.** Even if you have the account, evaluate if you have the titles and the contact information demand generation requires.
- **Buyer's journey and content mapping.** Can you describe the path a typical buyer company passes through from becoming



aware of their need to deciding on a set of potential companies and solutions to choose from? Do you have content necessary to attract and serve all members of the buying committee as they perform their roles in the decision-making process?

- **Content engagement.** Has your market typically responded energetically to your outreach, or will you need to build more enticing engagement approaches?
- **Contribution to growth.** Do you understand how you've impacted pipeline? Have you looked for breakdowns in the process that are impacting sale follow-up and conversion?



Before going deeper into each of these leverage points, let's make sure we're all on the same page with respect to what we hope to accomplish with "demand generation." In many contexts, demand generation is used interchangeably with "lead generation." Our opinion is that demand generation is a broader concept that applies to more than the identification of leads.

If lead generation covers only the efforts to filling the marketing funnel with audiences who have a current need for and budget to drive the purchase of your product or service, it leaves out coverage of the buyer needs at other critical stages of their journey.

Pipeline acceleration efforts that can shorten the time to close and improve win rates with more effective decision support represent a huge opportunity for marketing to impact results.

We believe that the best demand generation strategies always look to make progress in both areas:

Demand Generation = Lead Generation + Pipeline Acceleration

Increase your ICP coverage

Identifying the total universe of companies you can serve gives you your Total Addressable Market (TAM). Your ICP is likely to be a subset within this, describing a more perfect match between specific company profiles and your company's unique value propositions—how you, different from any other company in your space, can better serve a target account's needs. Straightforward CRM or other database analysis can show you how many of the potential companies you could go after are actually available to you to work on.

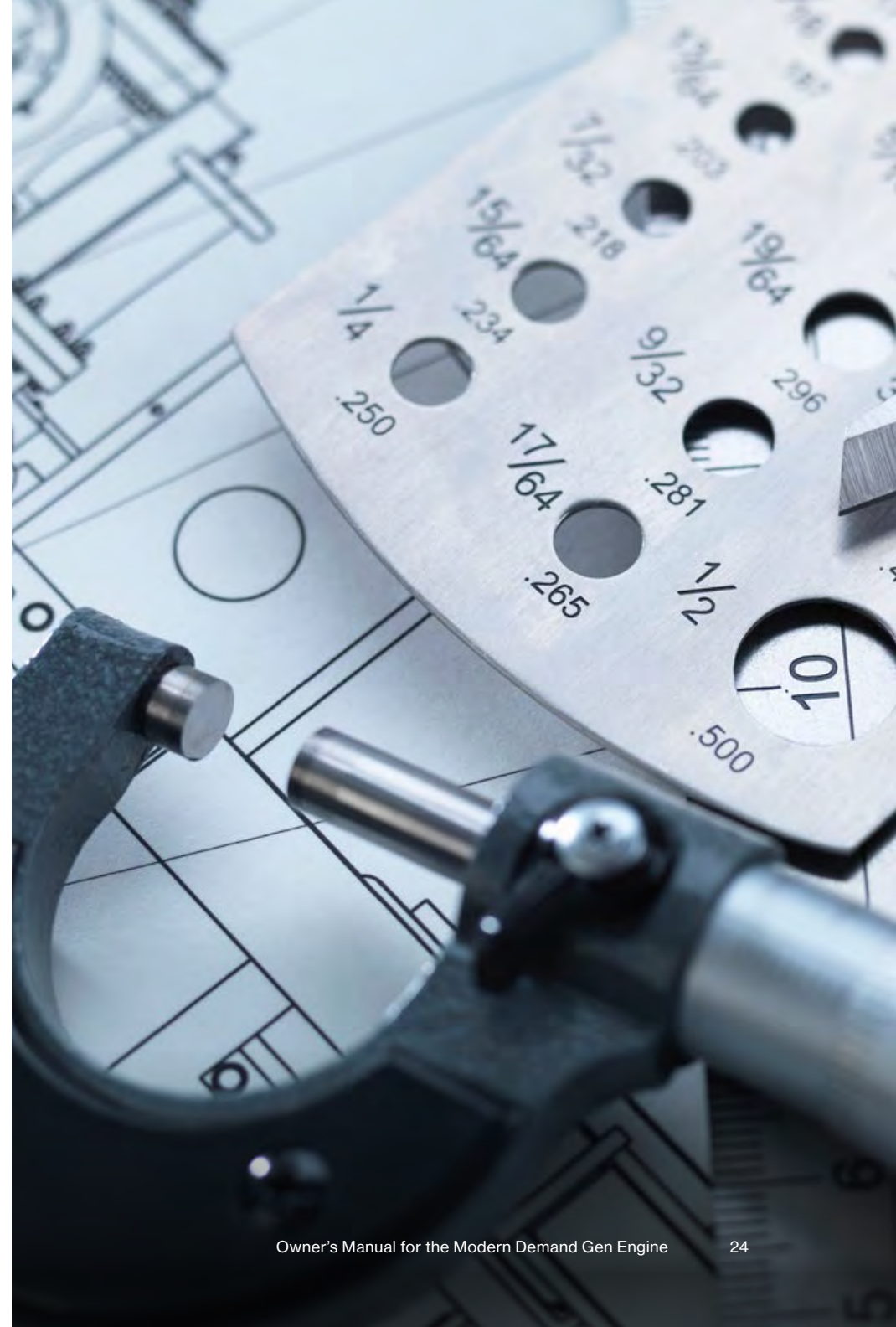
To maximize your marketing potential, you want to make sure that you've optimized your ability to pursue all the companies that are a good match. By increasing your ICP coverage, you stand a better chance of growing your total revenue.

Ensure account and contact record completeness

In your audit, map out the key buyer roles and confirm that you have phone, social IDs, email AND physical mailing address for each account. Emails that bounce, calls that can't go through and returned direct mail all contribute to reduced potential and reduced yield. To grow performance, you have to make sure you can communicate with the people inside the organizations you seek.

Once you locate and document your data gaps, you can implement data-augmentation approaches to remediate the issue and better manage it going forward. Solving data completeness and hygiene issues commonly involve a combination of:

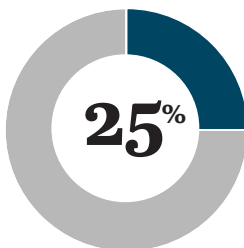
- **Progressive profiling & surveys.** Marketing automation tools make it relatively easy to leverage forms and surveys for data collection. While a contact is not likely to share the name and contact details of a peer on a form, it's not uncommon for them to correct data or provide additional touchpoint information (social media handles and the like) for themselves.



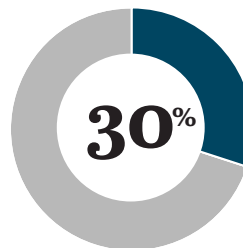
- **Sales augmentation.** Gain agreement and set data collection goals with your sales team. Occasionally, running internal data-add contests is a good way to keep momentum high for what most people consider low-priority tasks. Be very clear with the team so that they can understand and appreciate how this data will be used to support them as you work together to accelerate pipeline.
- **Data purchase.** If you feel nervous about adding data directly into your CRM, it's time to get over it. In competitive markets, there's simply no time to wait to get the data you need. As long as you acquire data from a reputable source, you follow the laws of your market and you use the information to communicate relevant, timely information, you're on solid ground. For example, where you've got opted-in contacts from one channel but are missing key pieces of information that you need to reach them in other ways, partnering with a data append service is a good way to increase your chances of breaking through.

Establish a data integrity baseline

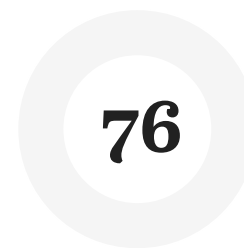
By documenting where you've been with respect to data, you can better communicate what's necessary for improving performance going forward. To communicate this challenge to your colleagues, you'll want to measure your average "integrity rate" across a set of meaningful data quality indicators.



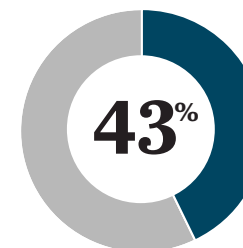
25% of the average B2B database is inaccurate.¹



30% of people change jobs annually.¹



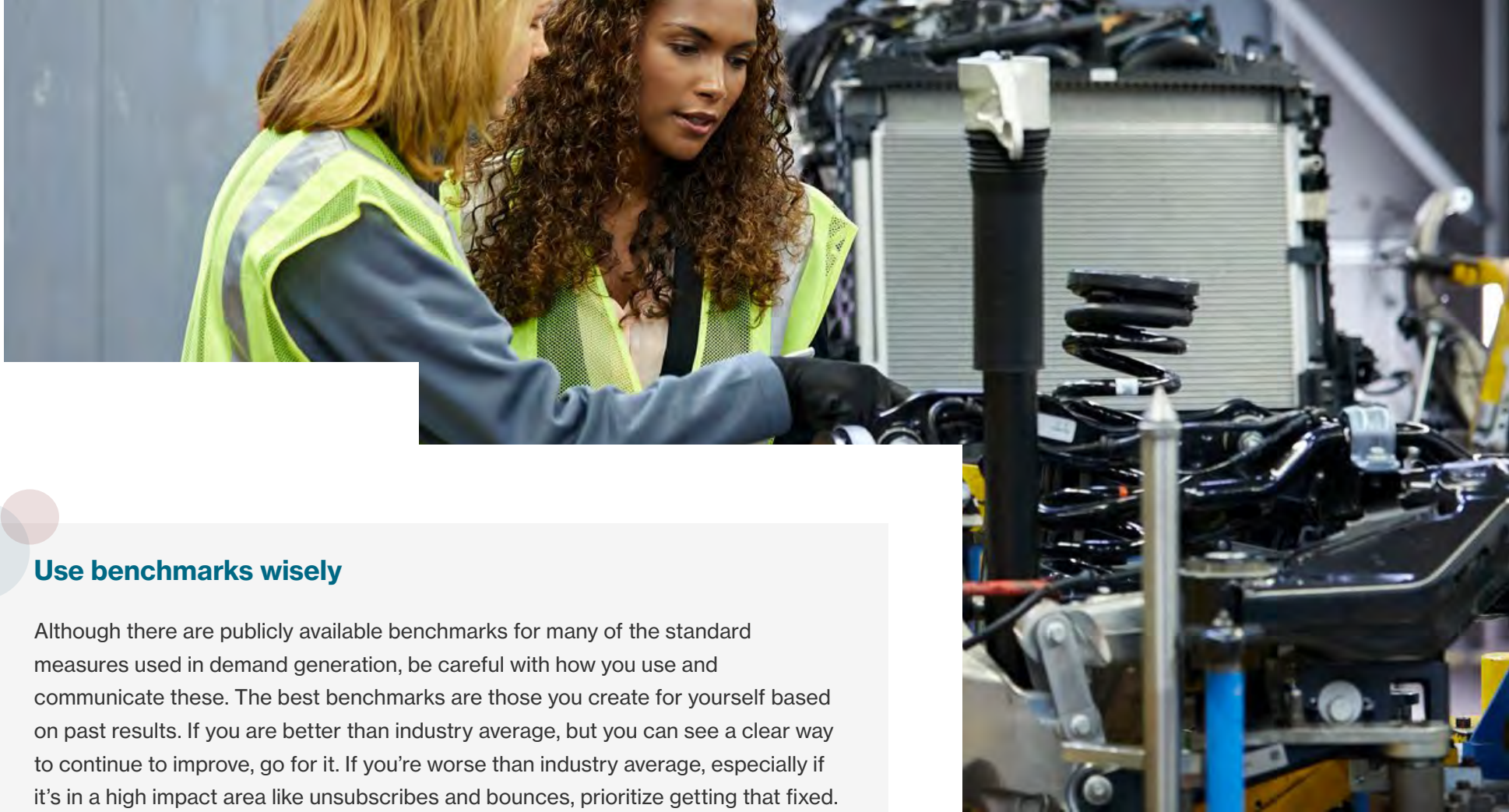
76 people change jobs every minute.¹



43% of people's phone numbers change annually.¹

¹ <https://blog.zoominfo.com/the-effect-of-dirty-data-on-roi/>





Use benchmarks wisely

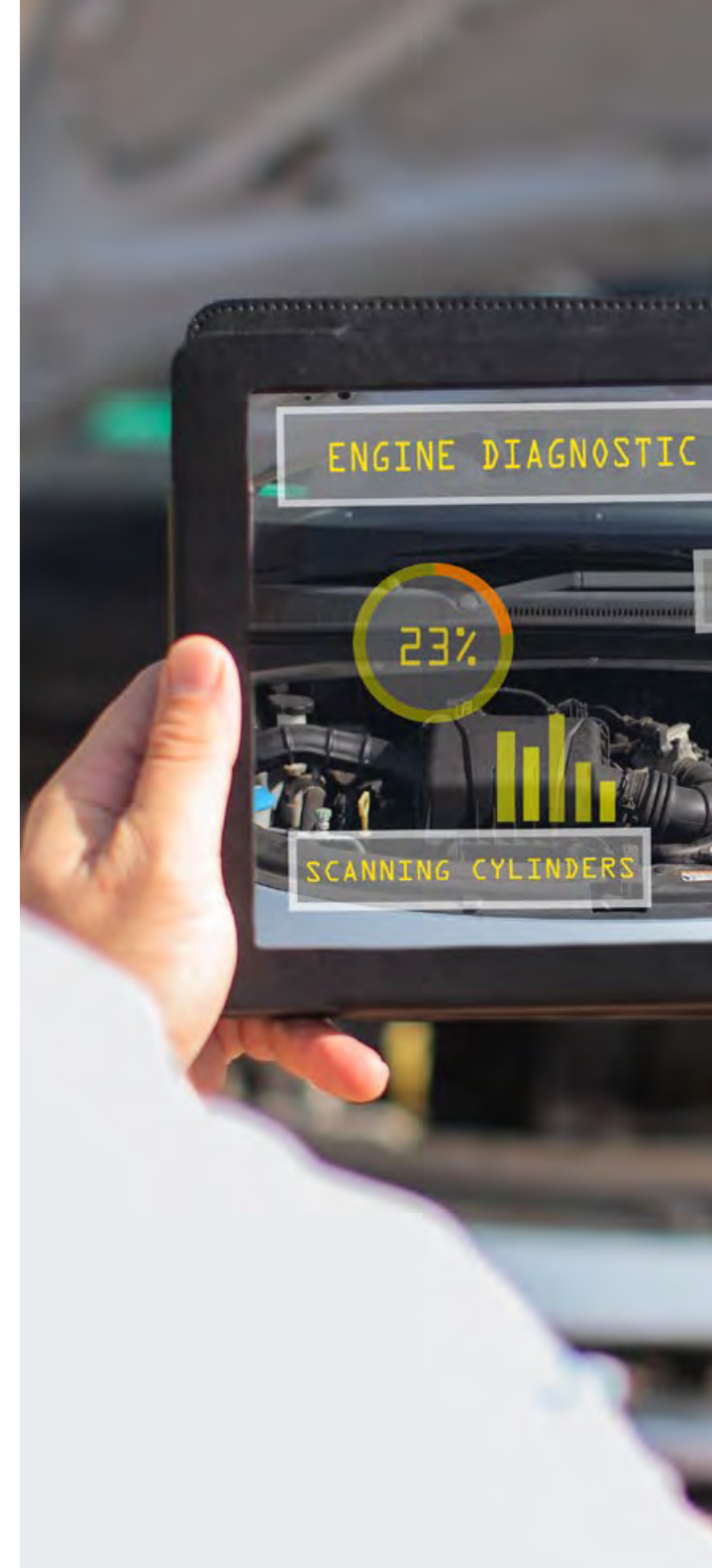
Although there are publicly available benchmarks for many of the standard measures used in demand generation, be careful with how you use and communicate these. The best benchmarks are those you create for yourself based on past results. If you are better than industry average, but you can see a clear way to continue to improve, go for it. If you're worse than industry average, especially if it's in a high impact area like unsubscribes and bounces, prioritize getting that fixed.

B2B industry benchmarks are all over the place. When establishing your own measurements, take into consideration the maturity of your market and solution. Evaluate this along with the goals of your marketing tactics; are they top of funnel or lower funnel? Is your email serving a dual purpose of awareness and conversion targeting mid-funnel? These elements are all factors in establishing measurements that work best for you and your business.

What is truly contributing to your growth?

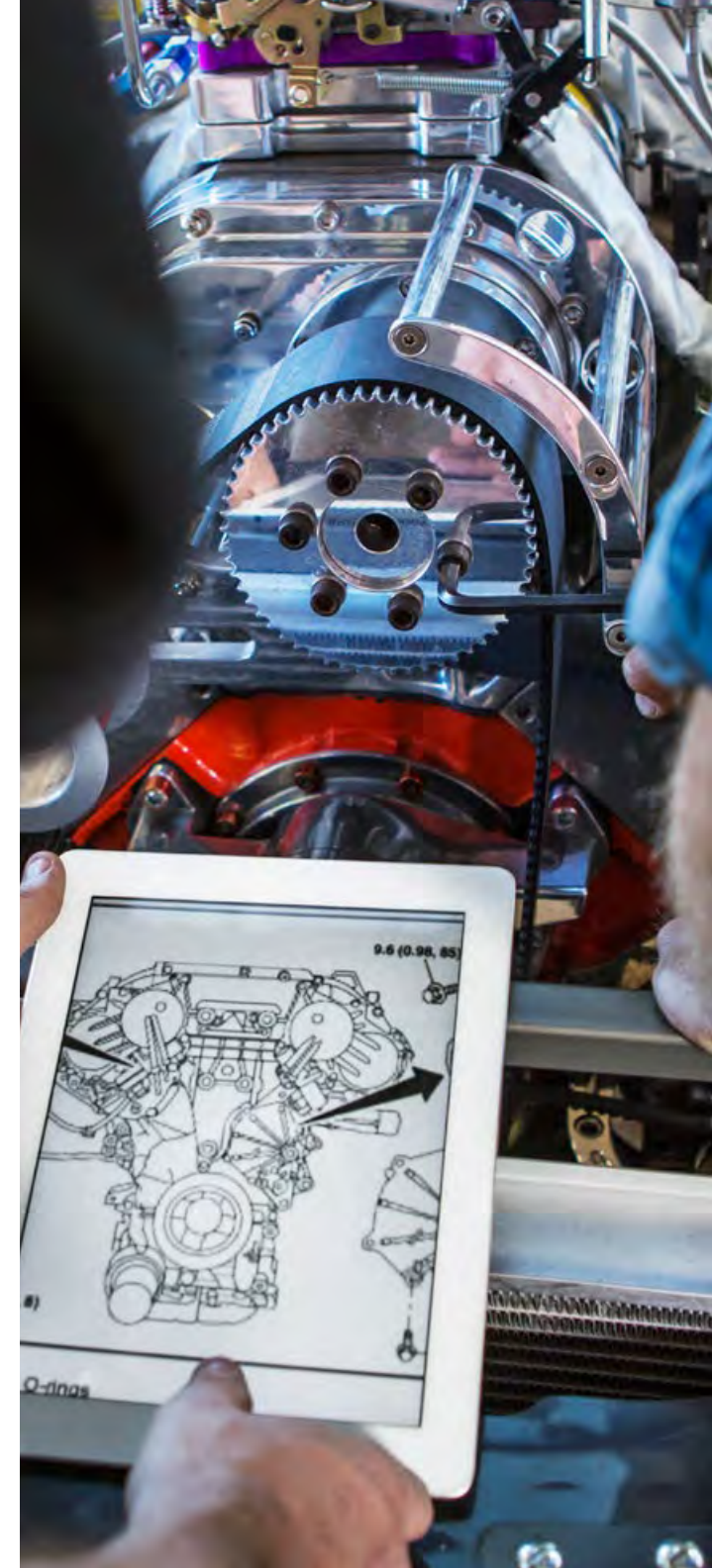
As part of your assessment and baselining, you'll want to develop a clear picture of your history from the perspective of classic key performance indicators (KPIs). This can give you a good overall demand gen "state-of-the-state" regarding the breadth and depth of the challenges you're looking to prioritize and address. (We'll cover marketing measurement in greater detail in Part 8.)

Stage	Time baseline (measured in days)	Conversion baseline
Campaign response	On average, how many touches does it take for you to get a response? _____	For each stage, document your current average conversion from one stage to the next.
Marketing qualified lead (MQL)	On average, how long does it take to convert a campaign response to a marketing qualified lead? _____	Campaign response to MQL _____ %
Opportunity	On average, how long does it take to transform an MQL to an opportunity vetted and forecasted by sales? _____	MQL to opportunity _____ %
Closed won	On average, how long do opportunities sit in your pipeline before winning or losing them? _____	Opportunity to won _____ %



As you are collecting your baseline metrics, keep in mind that the demand type relevant for your offering will impact both speed of conversion and conversion rates themselves. More well-known categories will be more stable and predictable. Where there's real pent-up demand, things can happen very quickly. When demand requires more education, it takes a longer process and more learning on your part regarding what the market needs from you to become comfortable with the ideas you seek to promote.

Demand Type	Time & Conversion Implications
Latent	With pent-up demand, you should expect buyers to move quickly through the early stages of your funnel. If your targeting is strong, a high percentage of MQLs will turn into opportunities.
Mature	Similar to latent demand, you should see a good percentage of MQLs quickly turn into opportunities. If your solution is the market leader, expect predictable sales cycles and a healthy percent of conversions matched with your current market share. However, if you are an up-and-coming solution in a mature market, you should expect to work harder at gaining traction in the market.
Nascent	This is often the most challenging environment for marketers but also the most rewarding. With good messaging and targeting, you should have a healthy conversion of outreach to campaign response. However, moving from MQL to opportunity will be more challenging, as your team will have a heavy burden on education and helping buyers move priorities from something else to your solution.





Part 4

Establish Organizational Alignment

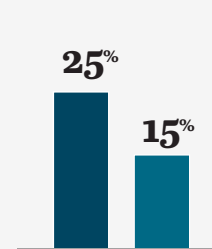
Establish Organizational Alignment

When sales and marketing talk about lead generation, tensions often arise. Marketing shows it's delivering a regular flow of leads but sales often believes the leads are of poor quality. While disagreements are normal, there are important steps you can take to prevent them from undermining what you'll need to continuously improve.

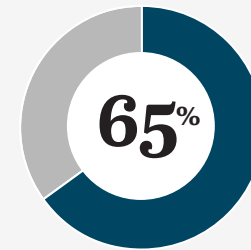
A lot of focus has been placed on aligning sales and marketing to avoid counterproductive activity. And while addressing lead follow-up is critical to an improved demand gen performance, there can be related issues to address first. With the rise of content marketing as a driver of inbound activity, many demand generation teams have specialized in filling the marketing funnel



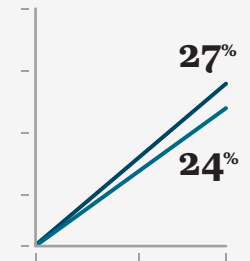
It's a fact that truly aligned teams exist. Their performance makes alignment well worth the effort.



25% quota achievement and 15% win rate added by sales teams when sales and marketing teams are aligned.¹



65% of sales reps report they can't find content to send to prospects.²



24% faster three-year revenue growth and 27% faster three-year profit growth among B2B organizations with tightly aligned sales and marketing operations.²

¹ <https://www.salesforce.com/blog/2013/08/sales-managers-performance.html>
² <https://blog.zoominfo.com/sales-and-marketing-alignment-statistics/>

with high traffic volumes. The good news is that there's gold in those audiences. The challenge is that we need to do a great job at further qualifying before expecting sales to get involved. In a sense, then, marketing needs to align itself differently before expecting better alignment with sales.

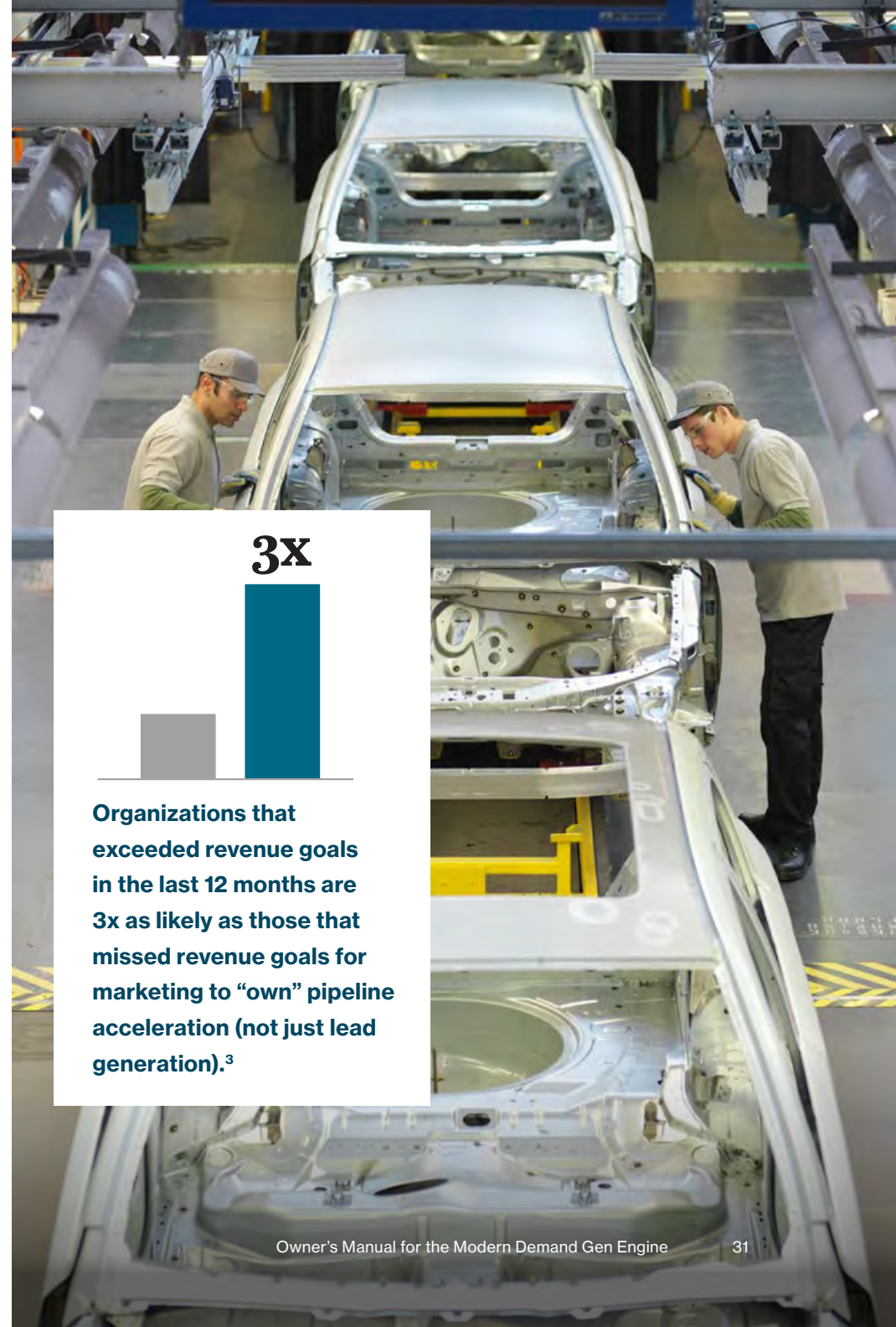
The question becomes not should we align, but how can we best align? These five steps will help set you up for a tighter collaboration with your sellers.

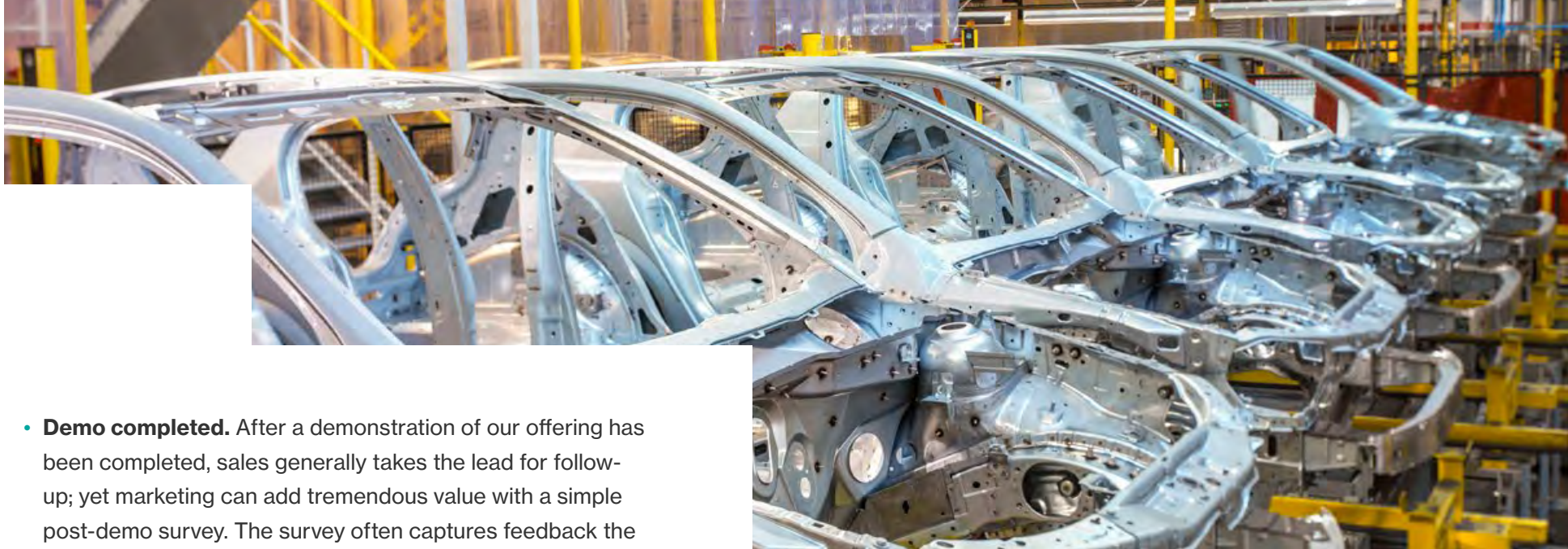
1. Beyond leads, share “ownership” of pipeline performance

The very first thing well-aligned teams do is break away from the common but counterproductive belief that it's all about a handoff—that marketing does its thing and then sales takes over completely. Instead, marketing should be prepared to take on critical responsibilities for nurturing relationships from early interest to close and beyond.

Very different from wide-aperture, top-of-funnel lead generation efforts, pipeline acceleration programs perform by being extremely focused. Among the possibilities, some of the most effective approaches are very straightforward:

³ <https://marketingadvisorynetwork.com/wp-content/uploads/2016/03/Sales-and-Marketing-Collaboration-Study-June-2016.pdf>





- **Demo completed.** After a demonstration of our offering has been completed, sales generally takes the lead for follow-up; yet marketing can add tremendous value with a simple post-demo survey. The survey often captures feedback the prospect won't verbally share with the salesperson, and it shows the buyer that your organization really cares about their opinion.
- **Proposal sent.** Your sales team is going to take the lead on closing opportunities once a proposal has been sent, but marketing can have a positive impact on receptivity. One proven technique for increasing win rate is to develop a direct mail campaign to those organizations in the final stages of consideration. Be sure to include a handwritten and personally signed note to communicate your company's authentic interest in their business.
- **Closed-lost due to "did nothing/stalled" accounts.** Deals that were closed due to inactivity more than six months ago can be low-hanging fruit. These are organizations that at one

point had need and desire but didn't move forward for any number of internal issues. Marketing communications can often re-invigorate the relationship with new business case building tools, ROI calculators, case studies or special programs.

- **Competitive bid.** If the sales team is doing a good job sharing information about prospective buyers, you will be able to identify which competitors are being considered in addition to your own. Competitor-specific nurture streams complement your sales team's efforts and can significantly increase win rates. To be most effective, these nurture streams should focus on the features and benefits that differentiate your



solutions from others in the market rather than calling out the competition by name. Showcasing a relevant case study can be effective at validating your claims.

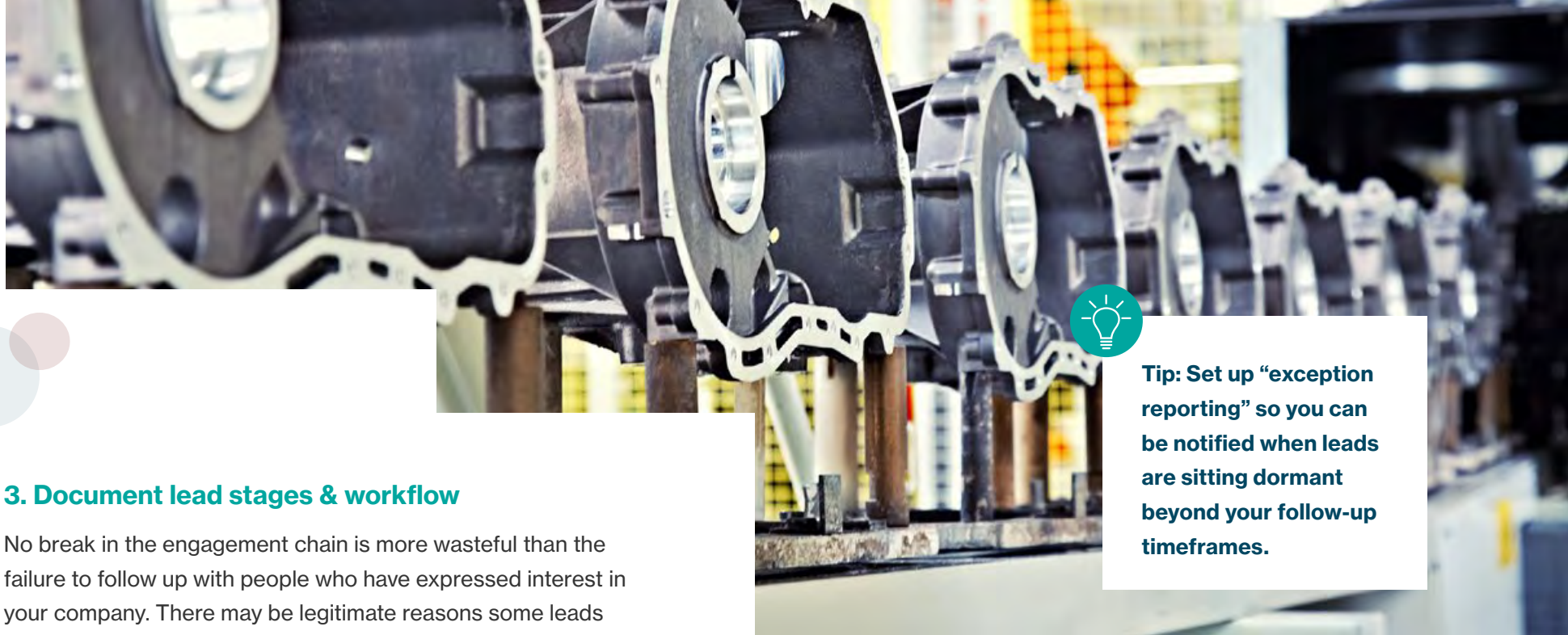
In addition to one-off programs that are stage specific, you will want to consider building more ongoing communication streams that support the sales team's relationship-nurturing over time. The cadence will vary based on your audience, but you should never let weeks or months go by without offering some type of re-engagement content. These offerings can be delivered via personalized sales emails, ad retargeting or marketing-led emails and events.

2. Construct your ICP collaboratively

In Part 1, we talked about the role an ideal customer profile (ICP) plays in effective demand generation. We guided you on a framework for building out your ICP without getting into exactly how to manage the process. Part of the huge importance of the ICP build and part of marketing's role in it revolves around how it can bring the extended team together. ICP documentation is a joint effort that should deliver the same understanding of the target market to all the players with a role in pursuing it.



As a demand generation marketer, you will obviously be a beneficiary of the output. You can and should also play an instrumental role in contributing to the inputs. Be prepared to obtain market sizing data (sources like Hoovers can provide rough company counts at no cost). Share trend information about which accounts have been most responsive to your messaging and current assets, first and last touch details and data on the speed of conversion from marketing engagement to opportunity creation with respect to different types of accounts and deals.



3. Document lead stages & workflow

No break in the engagement chain is more wasteful than the failure to follow up with people who have expressed interest in your company. There may be legitimate reasons some leads are ignored, but you'll want to reduce these to a bare minimum. Working with sales management, you'll need to gain agreement on which leads should always be pursued, why this is the case and how sales should position their outreach. Even with manager agreement on basic definitions and prescribed actions, you may need to implement a formal SLA that requires documented action. Be prepared to meet monthly, or more often, to see that this "agreement" has become actual practice or whether the agreement itself needs further refinement.



Tip: Set up "exception reporting" so you can be notified when leads are sitting dormant beyond your follow-up timeframes.

4. Measure and monitor the process

The best aligned teams lose focus when they are not in constant communication. Seek and share feedback frequently with sales managers and salespeople alike through formal meetings, informal discussions and system generated outputs.

5. Become an active partner

Demand generation marketers are managing a huge variety of tasks. We have to depend on our product marketing peers for guidance on markets, prospects, positioning and messaging. By the same token, we have access to a lot of inputs that can better

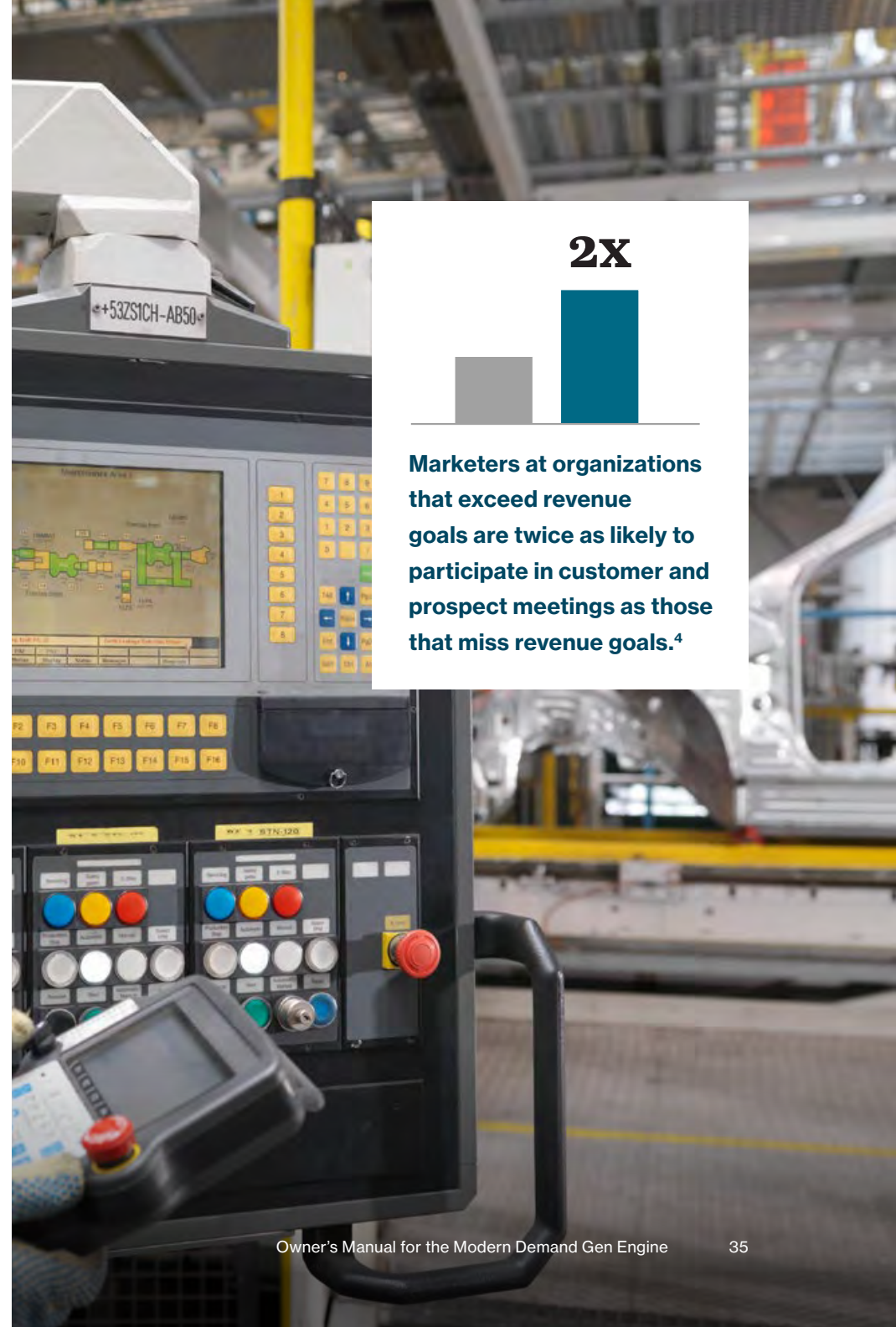
educate us to what improvements are needed. Simply listening to sales calls and participating in customer meetings build empathy for the buyer that would get lost in translation if we were to rely only on written input. The more energy you can devote to getting close to real customers, the better you'll understand the nuances of the content they need to make decisions. By becoming more of an active partner in understanding the market, you will be more aware of where your sales team struggles and be able to spotlight successful encounters you can then help scale.



Tip: Develop and share a quarterly content calendar with sales colleagues

This sounds so simple it probably doesn't need an explanation, but it certainly needs a healthy reminder. When pulled in many different directions, it's easy to get distracted and disconnected from our peers in other functions. Maintaining a single, shared content calendar can prevent this from impacting results.

⁴ <https://marketingadvisorynetwork.com/wp-content/uploads/2016/03/Sales-and-Marketing-Collaboration-Study-June-2016.pdf>



2X

Marketers at organizations that exceed revenue goals are twice as likely to participate in customer and prospect meetings as those that miss revenue goals.⁴



Part 5

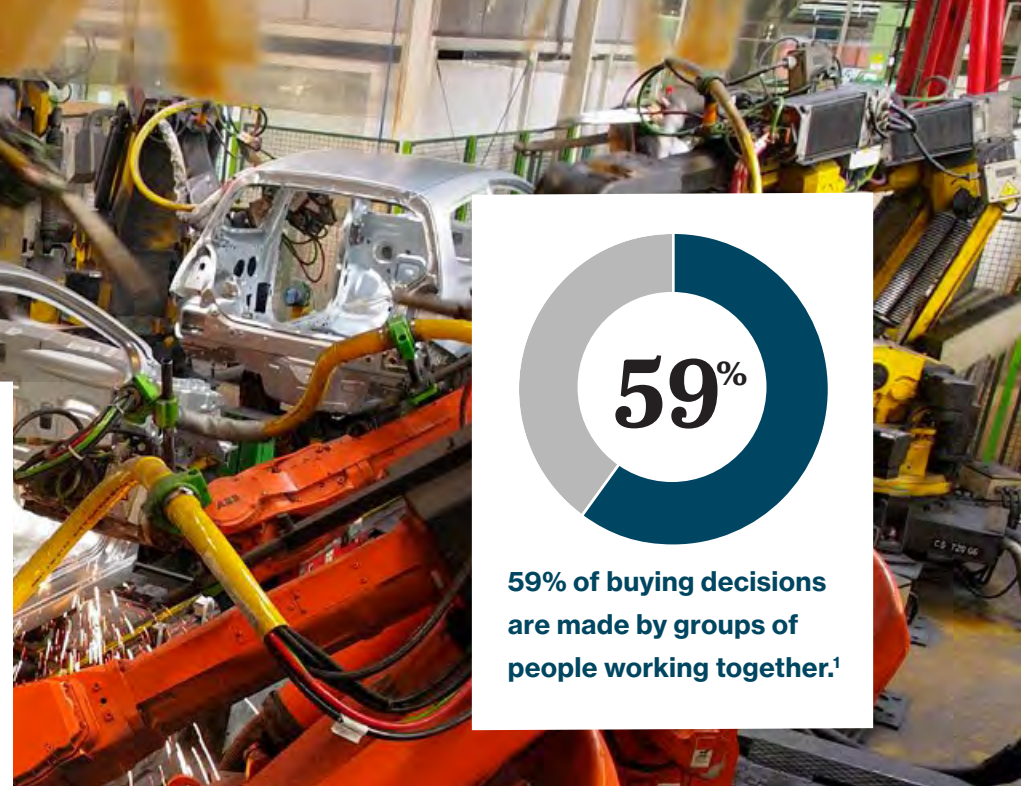
Building for the Buying Committee

Building for the Buying Committee

In B2B, when we market and sell to organizations, we will likely be working with members of a buying committee both directly and “behind the scenes.” (For a kind of “ultimate guide”

to everything related to buying committees, read this summary of [The Challenger Customer](#).) While your buyers may involve five, ten or more players in their purchase-decision-making process, those individuals will fall into one of three categories

- **Economic buyers.** Set budgets, approve expenses
- **Users/Champions.** Identify problem or opportunity, define requirements, evaluate usability
- **Influencers.** Contribute to one or more stages of the buying process but are not the primary champion or project driver. (An important element to watch out for here is that these folks can



commonly be blockers of change, so don't make the mistake of ignoring them altogether. Your best bet is to get ahead of the game by identifying them and addressing their concerns in the materials you provide to your champions.)

Understanding the role each player has in the buying process allows you to:

- Serve the right content at the right time to progress opportunities
- Maximize engagement by focusing interactions where they will have a necessary impact

¹ The SiriusDecisions Buying Spectrum, 2019

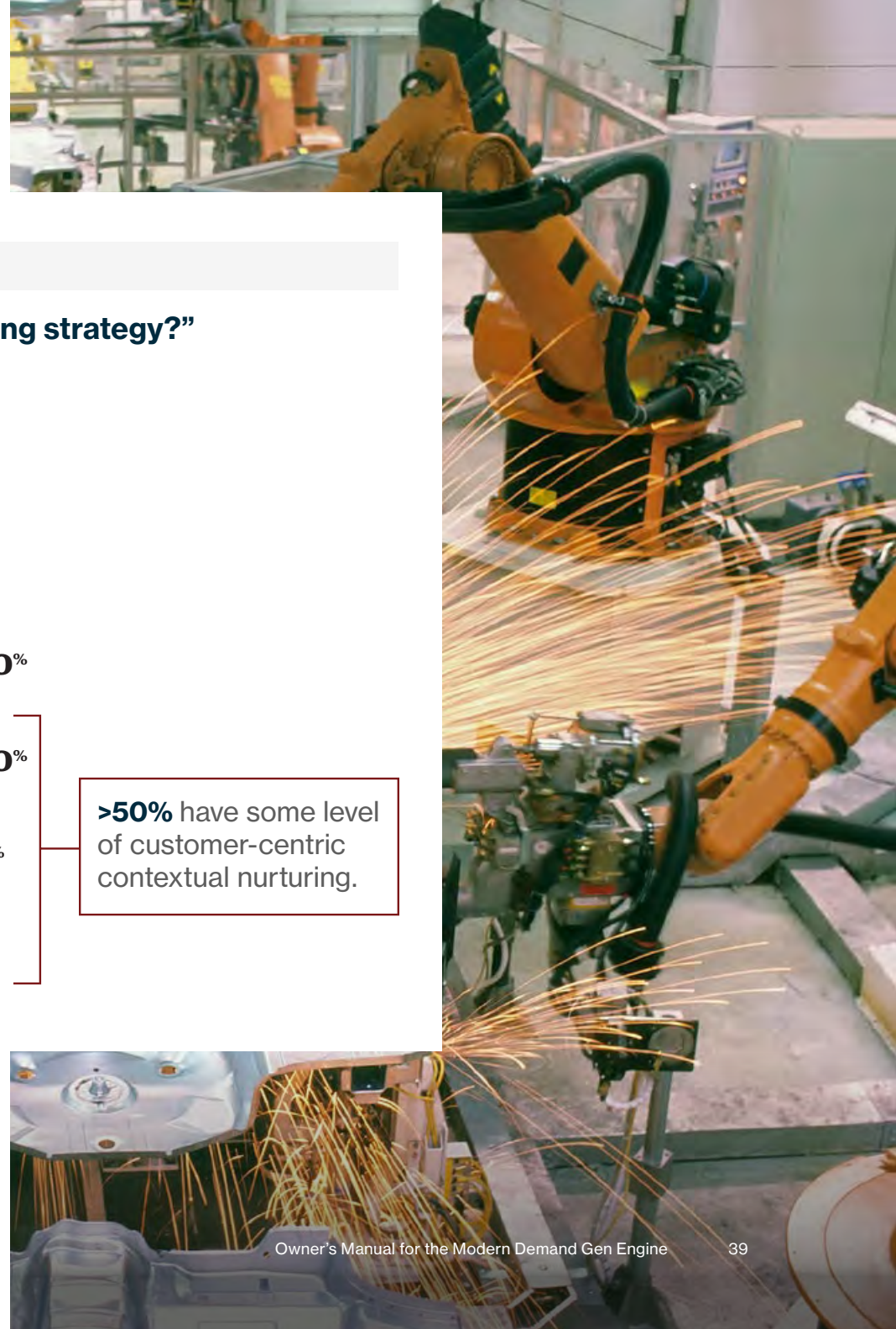


- Read signals about the progress and health of a buyer's journey based on who is consuming what content

You began the process of mapping buyer committee roles in Part 2 with the content map. At this stage you're ready to identify high-priority content gaps that you must create to serve a critical buyer need or better signal where the buyer is in their journey. For example, once a user has visited your website and downloaded a datasheet, they could be in an early stage, but they could be creating a shortlist. You may want to trigger a multi-touch nurture stream that delivers a burst of important decision support material to help you determine where they might be in their process. Don't forget to embed qualifying questions in your assets to hear back firsthand from readers.



2 Forrester, 2018 Global B2B Marketing Benchmark Panel Online Survey

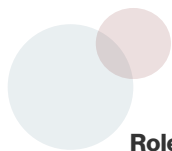


Nurturing Practices Are Increasingly Customer-Centric

“Which statement best describes your lead nurturing strategy?”

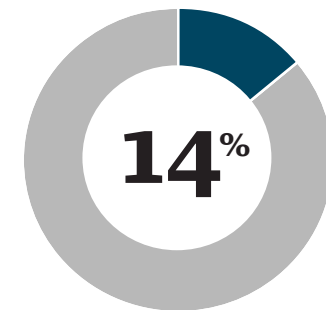
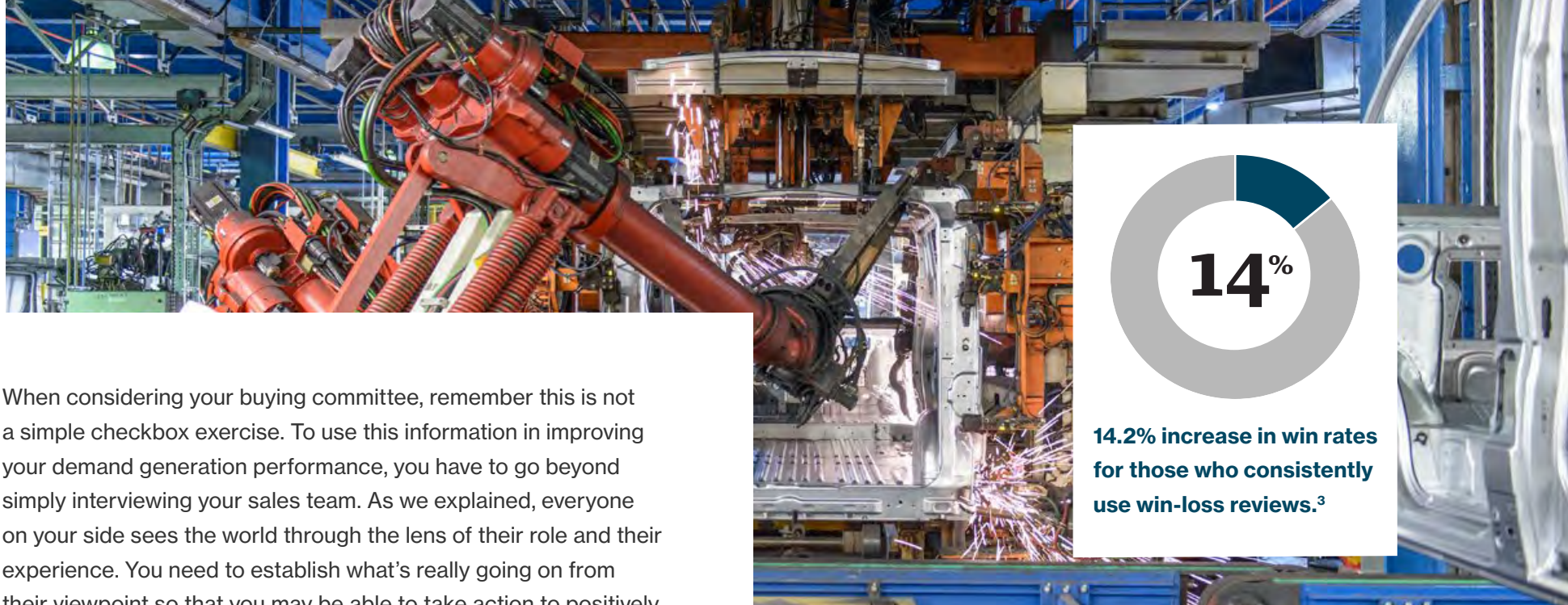
(Responses in order of survey appearance; not all responses shown)





Role	Titles/Functions of contacts related to this role	Problem identification	Evaluation of options	Vendor comparisons	Negotiation
Economic buyers		For strategic purchases, economic buyers may trigger research at a minimum. For more tactical solutions, the user will generally be the driver.	Allocate budget; propose a timeline.	Review proposal from user and influencer committee to ensure it meets corporate standards.	Provides final signoff on price and terms.
Users/ Champions		Identifies user-level business problem to solve or an opportunity to improve.	Build a business case.	Schedule demos, coordinate RFPs, collect pricing, check references, develop list of vendors to consider.	Facilitates purchase process.
Influencers		May influence prioritization of this effort over others. May also enforce standards and call out dependencies or identify other priorities ahead of this one.	Contribute to requirements.	Participate in meetings and provide feedback on vendors being considered, validate corporate standards are being met.	May be involved if part of finance or legal.





**14.2% increase in win rates
for those who consistently
use win-loss reviews.³**

When considering your buying committee, remember this is not a simple checkbox exercise. To use this information in improving your demand generation performance, you have to go beyond simply interviewing your sales team. As we explained, everyone on your side sees the world through the lens of their role and their experience. You need to establish what's really going on from their viewpoint so that you may be able to take action to positively impact it.

Here are some great ways to get the effort started:

1. **Conduct win/loss interviews.** Most CRM systems track deals lost with a dropdown field asking the sales team to say why a deal was won or lost. For many organizations, the responses fall into one of three categories: Price, feature gaps or inactivity. That's a start, but it doesn't provide you with much to build new actions against. Since changing what you capture in the system can be much harder than imagined, a parallel process of conducting Win/Loss interviews can be a faster path to essential learning on what worked well and where your

approaches need an upgrade. Since people are reluctant to criticize others directly, Win/Loss interviewing yields richer insights if it doesn't come from sales directly. Use an external third party if you can, or execute the process out of marketing.

2. **Create persona-based customer journey summaries.** Your sales team is a great source of insight because they host buyer discussions every week. However, they have direct access only to the information that's openly shared with them during the sales process. Much of the research that buyers conduct is outside the scope of the salesperson's interactions. There are two great ways to get a more complete picture.

³ <https://www.csinsights.com/blog/value-winloss-reviews-part-1/>



One is by subscribing to a 3rd-party source of insight directly into your market, like an analyst's coverage or a source of purchase intent data.

The other is to interview buyers directly and have them step you through their buying processes. Be sure to speak both with current customers and also those who are not as familiar with your brand. These qualitative interviews are an invaluable source of insight, but it's up to you to do the work necessary to derive real value out of them.

3. Operationalize persona-based outreach. A person's title can seem like the perfect proxy for their role in the buying committee, but titles alone get you only so far toward building a more relevant asset or campaign. It's not uncommon for

there to be literally thousands of title variants within any of the functions you should be targeting. Many organizations solve for this by creating a "function" field in the database to group like titles together. This is a good interim step. In addition, the most effective organizations add a "persona" field to discover and then capture that individual's specific role in the journey specific to that account. This field can then be populated by either marketing or sales engagement and used by the team to accelerate the deal as it progresses and for future improvement efforts alike.



Understand that personas change—or they may not yet exist.

Personas change and emerge based on evolving market and solution needs, and your teams must be able to accommodate strategies and processes as new opportunities present themselves:

- **Net-new/expanding personas.** Organizations are realizing that solutions targeting one type of issue can have important implications in other areas and are expanding the skill on their teams accordingly. New titles/roles are being created to reflect this cross-pollination and the scope of the buying team is broadening.
- **New paradigm.** If your product represents a new paradigm, it's often too early for either the market or the relevant roles to be clearly articulated. Rather than force-fit personas of early adopters, you should focus on educating markets broadly and observing engagement and behavior to find the right paths to repeatable, scalable success. When investigating these pathways, newly arising useful personas become apparent and ready for you to operationalize.

4. **Plan for frequent updates.** If you're feeling a little overwhelmed by how much research is required, we hear you! Your initial effort is definitely going to be a heavy lift that might benefit from some outside help.

Most companies pilot the process with a subset of activity first to iron out the kinks, prove the value and prevent the kind of overreach that can cause an effort to collapse under its own weight. Once you're through the startup effort, it will get easier; but don't forget that the performance you're pursuing will require continuous attention and effort. By building buyer interviews into your regular cadence of work, you will stay comfortably abreast of changes in the buying process and competitive landscape while keeping the added burden more manageable.



Part 6

Marketing Channels, Programs and Campaigns

Marketing Channels, Programs and Campaigns

Our peers outside of marketing often use marketing-speak, naive to the nuances that can create confusion within the team as a whole.

A program to one person might be the same as a campaign to you. While getting the words right might not seem like a high priority in the grand scheme of things, creating clarity from the start can pay productivity and alignment dividends down the road.

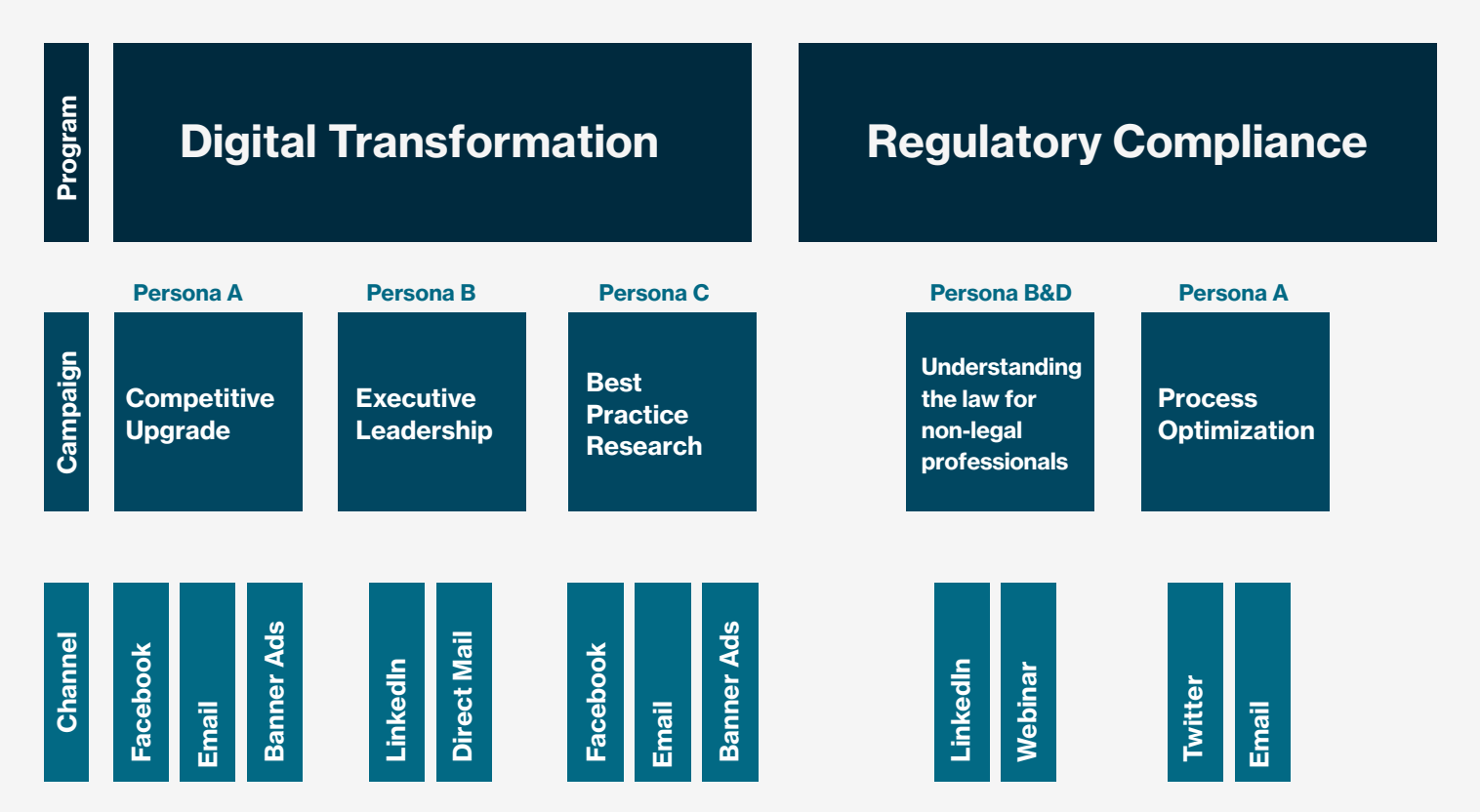
Understanding what marketers mean when we talk about channels, programs and campaigns can be essential to setting expectations around resource allocation and budgeting. It's useful as a guide



when discussing and reporting on expected outcomes. And for the diverse groups within marketing, it's a great way to become better organized around the many diverse activities and objectives we participate in.

The best way to avoid terminal terminology confusion is to document a marketing activity taxonomy that everyone can rally around.

For example, consider a company that sells data privacy software. Their taxonomy might look something like this:

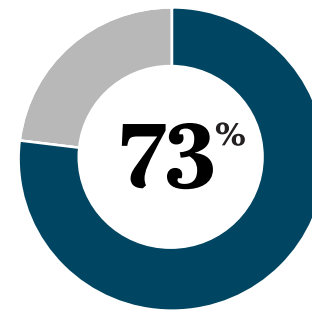




- **Programs** typically represent strategic themes that you will promote during a specific timeframe that align to business goals. Each program should consist of several campaigns and may serve multiple persona audiences, industries or geographies. Programs consist of multiple marketing touchpoints (webinars, email, social, physical events, direct mail, telemarketing/sales) to nurture buyers and engage them with your company and solutions throughout their journey.
- **Campaigns** are actions focused on a consistent message and offer that can be promoted across multiple touchpoints.
- **Channels** are the distribution mechanisms through which you will promote your messages and offers. For each, you will define an editorial calendar that outlines what content will be shared in each channel. Be sure to outline a detailed schedule that takes into account the frequency necessary to ensure resonance with your audience.

A high-impact marketing plan will clearly articulate programs, campaign components and channels to be tested.

¹ Source: <http://view.ceros.com/g3-communications/dg096-surv/p/1>



Fueled by Content

73% of B2B buyers consume 3 or more pieces of content in multiple channels before speaking with a salesperson.¹



Part 7

Lead Scoring and Action Triggers

Lead Scoring and Action Triggers

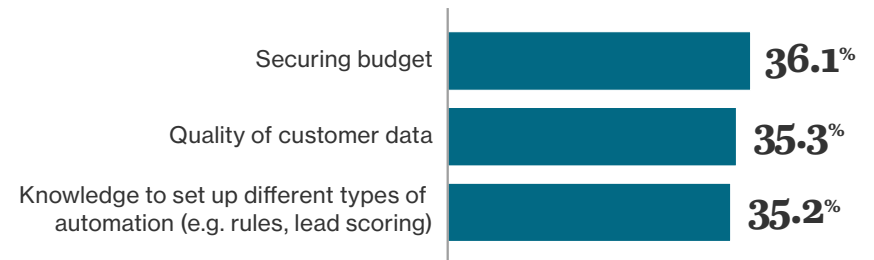
It's been years since the introduction of lead scoring to B2B, mostly via what's been built into the marketing automation platforms (MAPs) we use for demand generation.

Unfortunately, the uncomfortable truth is that lead scoring in most organizations has never delivered on its initial promise. And the fact is that in many companies, the approach remains deeply flawed.

- We aspire to use lead scoring to help sales prioritize where they will invest their time, but many sales teams see little or no difference between one lead and another.



Top Marketing Automation Challenges¹




¹ Source: GetResponse and Smart Insights, Email and Marketing Automation Excellence Report



- We build complicated scoring models based on how much time or how frequently a contact has engaged with us but fail to capture the important difference between a single heavily engaged individual and a perhaps lightly but broadly engaged real buying team.
- We're overly dependent on the digital footprints present in our own systems and commonly neglect important signals available from 3rd-party sources.

The good news is you have the power to fix it by moving away from traditional lead scoring toward trigger actions based on intent signals. We can make lead scoring extremely actionable by automating a next step in engaging the lead based on what their action tells us about their stage of the buyer's journey. In this model, the most recent interaction a lead/contact takes determines what happens next.

Most next-step indicators will fall into one of four distinct action categories: Sales, Nurture, Behavior Change and Segmentation.



Type of Trigger	Description
Sales triggers	<p>Not all actions signal real buying intent. Carefully audit your content library and web pages to identify what signals are being given based on the content consumed. For example, a lead downloading an RFP template is providing a much stronger sign of sales readiness than the same lead reading an e-book on next year's predicted trends.</p> <p>Decide which leads and content consumptions signal top, middle and bottom of the funnel, and assign triggers accordingly. Those that are middle- or bottom-of-the-funnel should be assigned a sales task for follow-up, while top-of-funnel actions might simply augment the lead record without assigning a task.</p> <p>Keep in mind you should combine understanding of the action taken with the firmographic and role information gathered about the lead. Only those titles and companies that meet your agreed upon criteria with sales should be passed along with a task. You may also want to pass along tasks to different members of your team depending on their role in your sales process. For example, an event registration confirmation might go to your SDR/meeting setting team, whereas a request for pricing might go directly to your field sales representatives.</p>
Nurture triggers	<p>By now, we all understand the potential of rigorous nurture, but we also know how resource intensive it can be to set up and maintain lots of nurture streams. Start by focusing your attention on those actions that have historically moved your past buyers from one stage of the buying process to the next. An audit of your marketing automation data should provide great insight here, as will qualitative buyer interviews.</p> <p>For example, you might notice that the most common next engagement after watching your online demo is to read a product specifications datasheet. Rather than wait for the lead to ask for it, consider proactively prompting a nurture communication that provides that datasheet, along with a relevant case study.</p>

(Continued)

Type of Trigger	Description
(Continued) Nurture triggers	<p>When building nurture triggers, keep in mind you can't force a buyer to skip a step their organization requires. What you can do is accelerate how quickly they collect what's necessary for them to move forward.</p> <p>Lastly, when building your nurture triggers, try to take advantage of sales team actions. For example, once a first meeting has been completed, you may be able to help accelerate the deal by sending a feedback survey that will capture insights either you or sales can use to craft personalized follow-up outreach.</p>
Segmentation triggers	<p>Architect your content such that lead actions help you better understand and describe more about the engaging parties—how they view themselves and how you should treat them differently from others. This approach can be particularly helpful for leads that have little previous engagement and when you know little about their particular organization. For example, if you have a paper titled “Business Case Builder for Small-Business Marketers,” you can infer a lot about the segments this reader might fall into, size of company, role and even what stage of the buying process they might be in.</p>
Behavior change triggers	<p>Trigger-based programs don't blindly ignore historical interactions with a lead. Rather, they're used to help highlight patterns that are especially meaningful. Spikes in an account's activity such as consuming more content than usual, or a first-time, high-value interaction such as attending an event after months of low-touch content downloads, are signals worth acting upon more aggressively. You really don't want these high-value moments to get lost in the sea of generic interactions.</p>

It's worth acknowledging here that trigger-based scoring is usually harder work than defaulting to traditional cumulative scoring models. Our own experience has shown that the payoff in lead-to-opportunity conversion is totally worth the effort. Well-thought-out triggers help you better focus on the more valuable signals you're capturing in your own systems, and they can ensure that you're making timely use of the valuable purchase intent insights 3rd-party data sources can provide.





Parts 8

Measurement & KPIs

Measurement & KPIs

If you remember nothing else from this chapter, remember this: Stop reporting on activity and instead hold marketing accountable for impact. That means letting go of the obsession with opens, downloads, views and shares and instead focusing on a different set of metrics that correlate marketing activity more closely to business health.

It should go without saying that marketing should share revenue goals with sales. However, we should also focus on these three key performance indicators (KPIs):

1. **Lead conversion rate.** While sales might be asking for more leads, what they really want is more opportunities. Instead of measuring lead volume, focus on lead conversion from hand-off to sale. This can include pipeline created, the number of leads which meet your ICP and those who directly request contact with sales. This could be a demo request, request for price, RFP invitation or other high-purchase signal interaction. This will ensure that you aren't just handing over leads but helping to find opportunities.



2. **Win rate.** If your demand generation program has done a good job of identifying accounts with active demand and you have identified your clear differentiation over competitors, you should see an increase in the percentage of deals that you win.
3. **Time spent in each stage of the buyer's journey.** Your careful efforts to map to the buyer's journey, with more relevant content, will begin to shorten the length of time buyers need to spend in each stage and will accelerate decision-making.

Your scorecard might look something like this:

Metric	Current	Goal	Last Quarter	Change	YTD Average
Financial					
Revenue	\$1,000,000	\$850,000	\$500,000	100%	
Pipeline Created	\$2,000,000	\$3,000,000	\$1,500,000	25%	
Win Rate	38.5%	35.0%	35.0%	10%	
Program Conversion metrics					
Lead to Pipeline Conversion	%				
# of Requests for Demo/ Meeting/RFP	#	#	#		
Length of Buying Process (Measured in Days)					
Discovery Call to Demo	18	20	24		22
Demo to Proposal	65	61	64		68
Proposal to Close	120	90	140		141

This does not mean we stop measuring open rates, website traffic, cost per lead or other general engagement metrics. However, we use that information differently. Instead of those being our accountability metrics, we use them as forecast indicators for marketing planning.



Parts 9

The Role of Awareness in Demand Generation

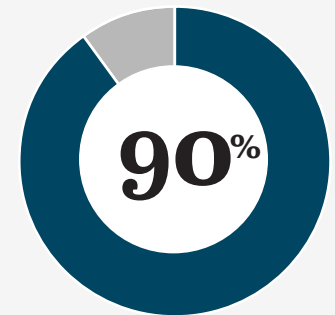
The Role of Awareness in Demand Generation

Digital advertising raises lead conversion rates. You've always known it, but it has historically been difficult to prove.

Demand generation marketers have an incredibly difficult job. Not only must you address growing revenue pressure, but there is a loudly spoken expectation that every activity you execute will be measured and must be proven to drive new opportunities.

It's one of the reasons that digital advertising strategies make many uncomfortable. It's impossible to sit in a boardroom and defend a .005% click-through rate. When every dollar counts, and all eyes are watching, you have to rely on tactics you can prove directly impact revenue.

Yet we know that some activities provide indirect positive impact (although impact is meaningful and much more direct than you would think) and that we are hurting long-term strategy by focusing only on things like click-through and short-term conversion rates.



90% of C-suite buyers say brand is moderately to significantly influential in shortlisting the buying process.¹

¹ Source: <https://www.siriusdecisions.com/blog/the-missing-link-brand-in-the-siriusdecisions-demand-waterfall>

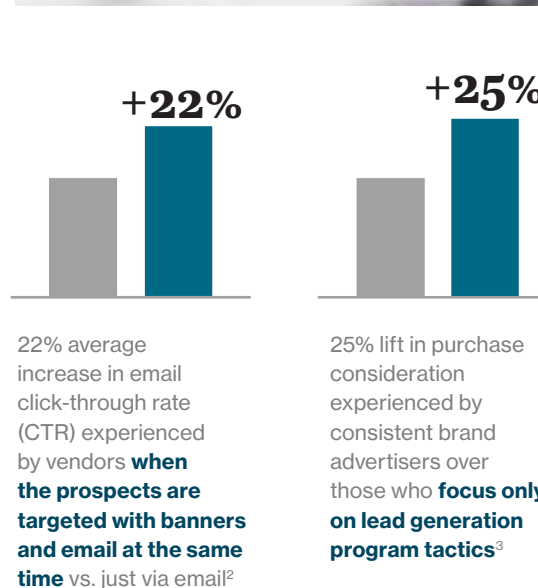


In fact, digital advertising and other awareness tools, such as public relations, play a significant role in purchase consideration by:

1. Driving engagement with your target audience and
2. Increasing the number of buyers who consider your brand when a purchase process has been initiated

All your campaigns, events and hundreds of weekly tasks boil down to these two essential actions. After all, a sales team has ZERO chance of winning an account if your company doesn't make the short list of solutions being considered.

While the goal is well understood, most demand generation marketers are balancing those two objectives against the pressure to deliver ROI for every dollar spent. While there is no silver bullet, we have discovered some critical correlations that can and should remove any hesitation when it comes to digital advertising and illuminate the critical boost that it provides for demand generation.



² Source: TechTarget test of 185,000 in-market prospects, control group vs. exposed group, 2017
³ Source: TechTarget analysis of 426 campaigns from 109 midmarket vendors, Jan. 2015-Dec. 2016

Targeted Branding Drives Downstream Consideration Lift⁴

Consistent Advertisers

who run 250K targeted banner impressions per quarter generate a 25% increase in consideration

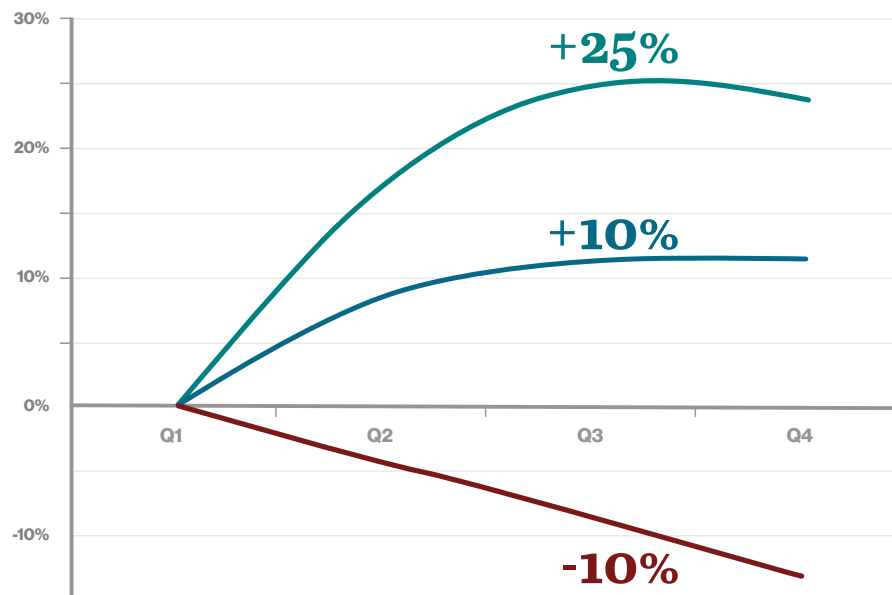
Inconsistent Advertisers

who run digital display sporadically generate a 10–15% lift

Non-Advertising Vendors

experience a 10%–15% decline in consideration vs. peer group

Change in consideration (426 campaigns from 109 midmarket vendors)



The results are remarkable because they show a clear difference between those vendors that ran only lead generation campaigns, such as content syndication or email outreach, vs. those that ran lead generation campaigns in conjunction with brand awareness advertising.

⁴ Source: TechTarget analysis of 426 campaigns from 109 midmarket vendors, Jan. 2015-Dec. 2016



Not only does consistent advertising provide significant consideration lift over sporadic advertisers, but those that did no digital display advertising experienced a decline in consideration compared to their peer group.

Better email open rates and higher consideration doesn't just feel good. It has a direct impact on the number of opportunities available for your sales team to pursue. Prospects who have your brand on their consideration radar are:

- More likely to return a call
- More likely to click on a content offer
- More amenable to a meeting
- More likely to include you in their RFP process





Part 10

Partnering to Accelerate Results

Partnering to Accelerate Results

By nature, we marketers are full of great ideas. And as continuous learners, we take in new sources of inspiration every day—so the idea pile keeps growing. Yet no one, no matter how smart, no matter how energetic and no matter how big the team or budget, can get everything done alone.

Coming to terms with this reality helps keep us centered. Coming to grips with it, and addressing it wisely, will help us move forward in a more productive (and satisfying) manner.

When we take a step back, we can easily see that constraints on our progress typically fall into four buckets:

- **Time.** We know what to do, we know how to do it; but we simply don't have the time to prioritize a specific program or set of tasks.

- **Skills.** We have an idea of what we want to accomplish but lack the specific skills needed to accomplish it ourselves. For example, maybe we have an idea for a mobile application but no technical resources on our team to build it.
- **Insights.** We know what questions we want to ask but don't have the resources to answer them. Maybe we lack the data we need to resolve a question or the analytic background to conduct primary research.
- **Alignment.** We know what we want to achieve, but the organization is not behind us, so there's a misalignment



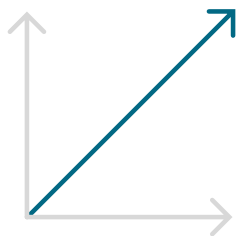
between functions or even within our own team. We need help overcoming this internal inertia.

We often know where we want to get to, but these common constraints slow down or completely block our path forward. When we can't find a way over a given barrier, it's time to look for a different solution altogether. That's where trusted partnerships can often give a leg up. They can be the tool that's different from anything in a company's current toolkit.

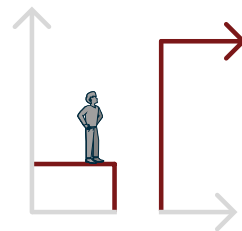
Partnerships can accelerate progress by eliminating or reducing constraints. They can be designed to help make clear, continuous progress or to vault us to a more productive level right away.



Accelerate progress through partnerships



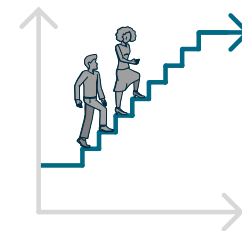
Every company wants to move to rapid, continuous improvement.



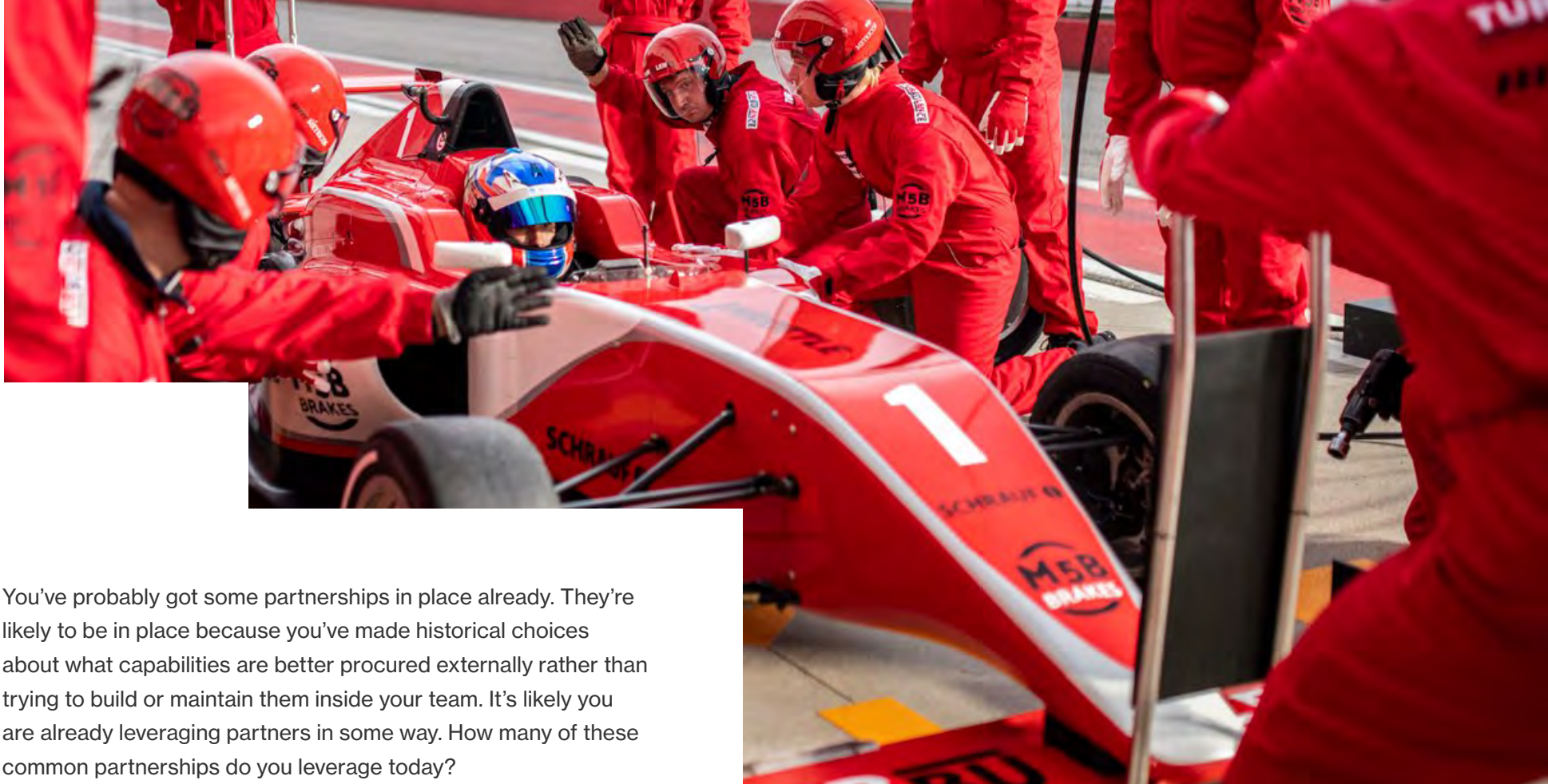
! But they are challenged by insurmountable gaps.



! Build-it-yourself solutions are often too slow.



★ **Ideal partnerships deliver what you need.**



You've probably got some partnerships in place already. They're likely to be in place because you've made historical choices about what capabilities are better procured externally rather than trying to build or maintain them inside your team. It's likely you are already leveraging partners in some way. How many of these common partnerships do you leverage today?

- | | |
|---|---|
| <input type="checkbox"/> PR agencies | <input type="checkbox"/> Writers |
| <input type="checkbox"/> Creative agencies | <input type="checkbox"/> Event producers |
| <input type="checkbox"/> Data providers | <input type="checkbox"/> SEO specialists |
| <input type="checkbox"/> Strategy consultants | <input type="checkbox"/> Website developers |
| <input type="checkbox"/> Research experts | <input type="checkbox"/> Graphic designers |

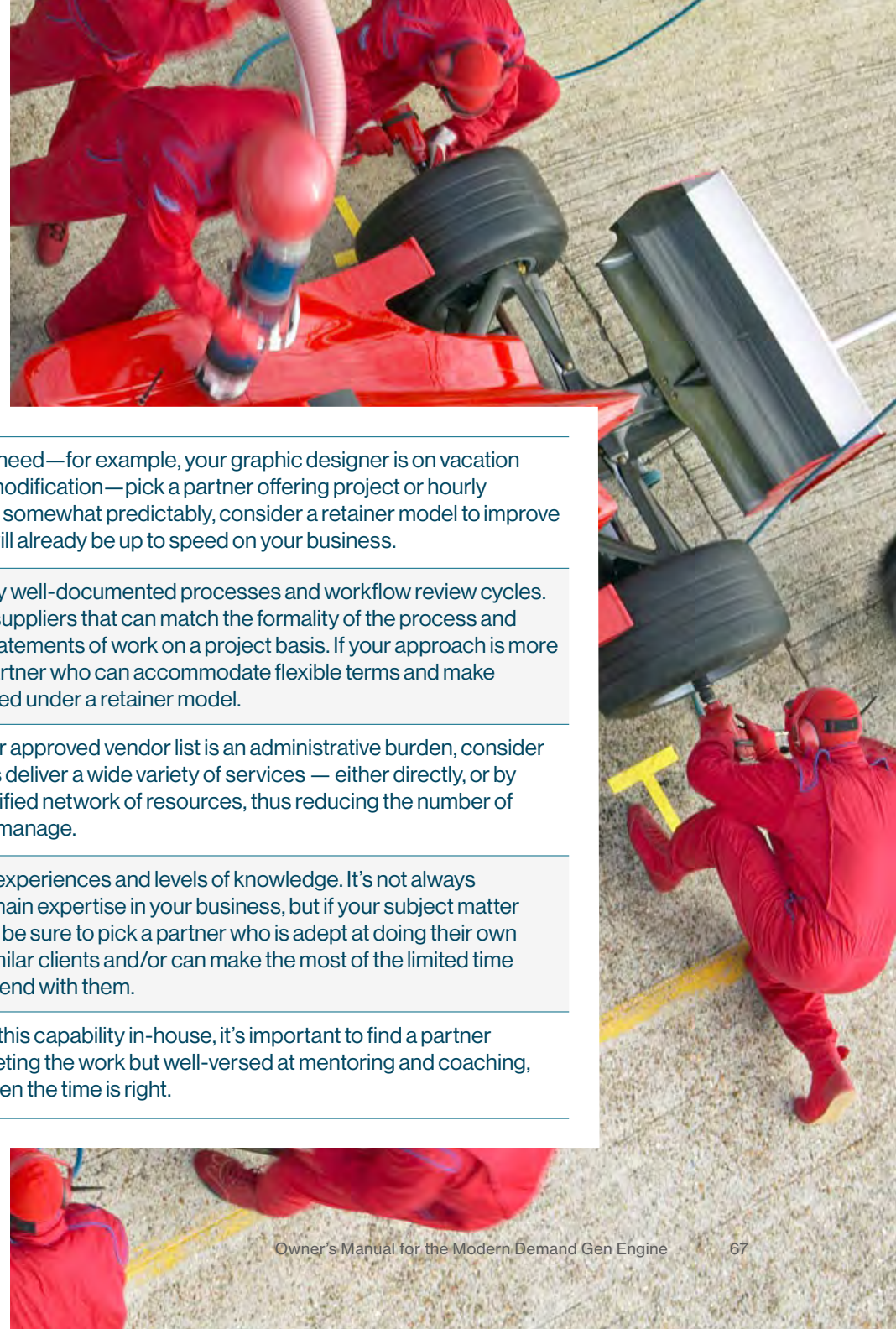
The question we're asking now is less about whether you need partnerships to achieve long-term goals and more about what's necessary to push forward right now so you can maximize success.

**To figure this out, dive deeper into what's holding you back.
Try to better understand the nature of your constraints.**

Time	What projects are on your to-do list but are at risk of missing deadlines?
	What have you had to deprioritize because you simply can't get to it, though you believe it should be done?
Skills	What's going too slowly because you don't have the skills on the team to properly complete the work?
	What have you had to say no to because no one on your team has the expertise to begin?
Insights	What questions can't you answer about your buyers or your outcomes?
	What audiences are you struggling to reach and engage?
Alignment	Where do your needs conflict with those in other areas of the business?
	What projects on your list are at risk of failure because you aren't getting the buy-in and support you need from others?



Once you truly understand the nature of the constraints on your progress—and before you jump to sign on a supplier—consider carefully what type of partnership is most likely to help you work through the specific issue. While a list of suppliers may all have strengths in the same area, how they can engage or how they prefer to deliver may be very different.



Is this a one-time need? Or will I need this on an ongoing basis?

If it's a very specific one-time need—for example, your graphic designer is on vacation and you need a quick image modification—pick a partner offering project or hourly pricing. For needs that repeat somewhat predictably, consider a retainer model to improve efficiency, as your resource will already be up to speed on your business.

Do we work best with very formal processes, or do we need to address agile, ad-hoc requests?

Some organizations have very well-documented processes and workflow review cycles. These teams work best with suppliers that can match the formality of the process and are able to define very tight statements of work on a project basis. If your approach is more fluid, it's often best to find a partner who can accommodate flexible terms and make themselves available as needed under a retainer model.

How easy is it to set up a new vendor in our system?

If adding a new partner to your approved vendor list is an administrative burden, consider partners who can themselves deliver a wide variety of services — either directly, or by sub-contracting to a pre-qualified network of resources, thus reducing the number of vendors you have to add and manage.

Are our subject matter experts readily available for vendor meetings?

Partners come with different experiences and levels of knowledge. It's not always necessary that they have domain expertise in your business, but if your subject matter experts are time constrained, be sure to pick a partner who is adept at doing their own research, has worked with similar clients and/or can make the most of the limited time your experts will be able to spend with them.

Is this a capability we ultimately want to bring in-house?

If you ultimately want to bring this capability in-house, it's important to find a partner who is not just good at completing the work but well-versed at mentoring and coaching, so your staff can take over when the time is right.



Partnering as a way to accelerate your company forward is a critical skill in its own right. In academic terms, it's a form of “make or buy” decision. As part of this, acknowledging that you just don't have the right capabilities or resources to solve a particular problem is a critical first step to overcoming it. Whether it's to fill short-term gaps, raise you over a barrier, or serve as a bridge across territory you always need to avoid, building the right partnerships can elevate your value delivery capabilities as a whole.

As demand generation marketers, it's easy for strategic progress to get stuck behind the challenges of near-term KPIs. The most successful demand generation practitioners have recognized the importance of fostering a methodology that enables longer-term progress at the same time as shorter-term. The right partnerships can help create real progress faster, with greater confidence and at greater scale.



Part 11

Campaign Brief Template

Campaign Brief Template

An internal campaign brief can serve as the go-to planning document for your demand generation programs. It will help you think through and detail expected outcomes. This will allow you to map out the best tactics across the various elements of a campaign.

Campaign name: _____

Project manager: _____

What's the most important SINGLE message you want to deliver?



What do you want the campaign to achieve?

Have you already decided on the channels where you will run the campaign?

Document them here (e.g., email, radio advertising, Snapchat).

Who is the campaign meant to compel?

This is where you will describe the audience for this campaign. How would you summarize the target audience for this campaign? Include relevant demographic factors such as stage of life, education level and discretionary income/budget authority.

Are you selling to a business or formal organization?

If so, be sure to include relevant firmographic information.

Are you targeting specific industries?

What sized companies are you targeting?

Which roles/functions within the organization are you targeting?

What do the organizations you are targeting have in common?

(e.g., are they all using a particular product? Has a law been passed that they need to address? Is their market declining or growing rapidly?)

Why should the audience respond?

What is happening now that should create urgency for the audience to take action? Pick one or more of the possibilities below and explain how they relate to your audience. Be as specific as possible.

Campaign calendar

List key campaign deliverables and who is responsible to execute them.

Action	Owner	Due Date

Download an editable
version of the Campaign
Brief [here](#).



Campaign approval process

Stage	Approval Committee	Due Date	Status
Campaign brief			
Storyboard			
Media plan			
Individual assets			

About TechTarget

TechTarget (Nasdaq: TTGT) is the global leader in purchase intent-driven marketing and sales services that deliver business impact for enterprise technology companies. By creating abundant, high-quality editorial content across more than 140 highly targeted technology-specific websites, TechTarget attracts and nurtures communities of technology buyers researching their companies' information technology needs. By understanding these buyers' content consumption behaviors, TechTarget creates the purchase intent insights that fuel efficient and effective marketing and sales activities for clients around the world.

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