



# 88 marketing plays for 2026

The B2B marketers' guide

# Executive summary

For the time-poor marketing leader, here is the **60-second overview**:

Budgets are up (83% of leaders expect an increase, Gartner), but don't get too excited... that additional investment comes with a whole new level of board scrutiny. The era of justifying marketing's existence with intermediate metrics is over.

We are no longer a cost centre; we are the revenue engine.

The B2B buyer has also changed. They are a digital-native, rep-free buying committee of 13+ stakeholders who are 83% of the way through their journey before they even contact sales (Forrester). They are also overwhelmed.

So the requirement is not to persuade, but to be the sense-makers.

**To guide you through what's ahead, this document focuses on five key pillars for 2026:**

## A nod to the various B2B models:

The playbook includes dedicated plays for high-growth sales motions beyond traditional lead-gen, including Product-Led Growth (PLG), B2B Direct-to-Consumer (DTC) e-commerce, and Channel/Partner marketing.

This may sound like a world apart from where you are as a business right now, but fear not, that's exactly why this document has been created and it will help steer you back to clarity.



# 1 Revenue-centric operations

The silos between Marketing, Sales, and Customer Success have disbanded. Revenue Operations (RevOps) is the new, non-negotiable operating system that creates a single, accountable "Revenue Team" focused on pipeline and Customer Lifetime Value (CLV).

# 2 Buyer enablement

Tactics are shifting from "selling" to "enabling." This puts precedence on using clean, first-party data to personalise at scale, creating "Digital Sales Rooms" to help the buying committee, and using AI-driven intent data to find buyers, before they find you.

# 3 Trust

The world is flooded with generic AI-slop, so human authenticity and expertise (E-E-A-T) are your primary competitive advantage. This is driven by CEO-led media, authentic community building, and an "educate, don't sell" content strategy.

# 4 The human and the machine

AI is rapidly moving from an experiment to an operational necessity. As a result, the Marketer's role has now evolved from the "doer" to the "orchestrator," - managing these new "tools" and putting their expertise into the more human-centric tasks that AI cannot replace, like strategy, creativity, and empathy.

# 5 Synchronised channel strategy

Your marketing channels no longer live in solidarity. SEO is now Generative Engine Optimisation (GEO). Social is a search engine. PPC is an AI-driven revenue function. Your analytics must "triangulate" the truth using server-side data and Marketing Mix Modelling (MMM). The game being played remains the same, but the rules within it have changed.



# The new playbook

The economy is sluggish, with UK GDP growth forecasts hovering around a mere **1.0 – 1.3%** (Bank of England). Inflation is stuck around 2.5% (HM Treasury), and interest rates remain elevated – meaning capital is high for everyone.

It's not all doom and gloom though. In fact, here's the paradox: our marketing budgets are actually up.

**83%** of B2B marketing leaders expect investment to increase (Forrester).

Wait for the catch, though – that investment comes with more pressure than ever before from the board. Fluffy metrics won't cut it. Your seat at the table and your budget depend on one thing – proving your direct contribution towards revenue.

**The good news?** You're already doing it. And with a bit more adjustment, you can do so even more.

## Who should read what?

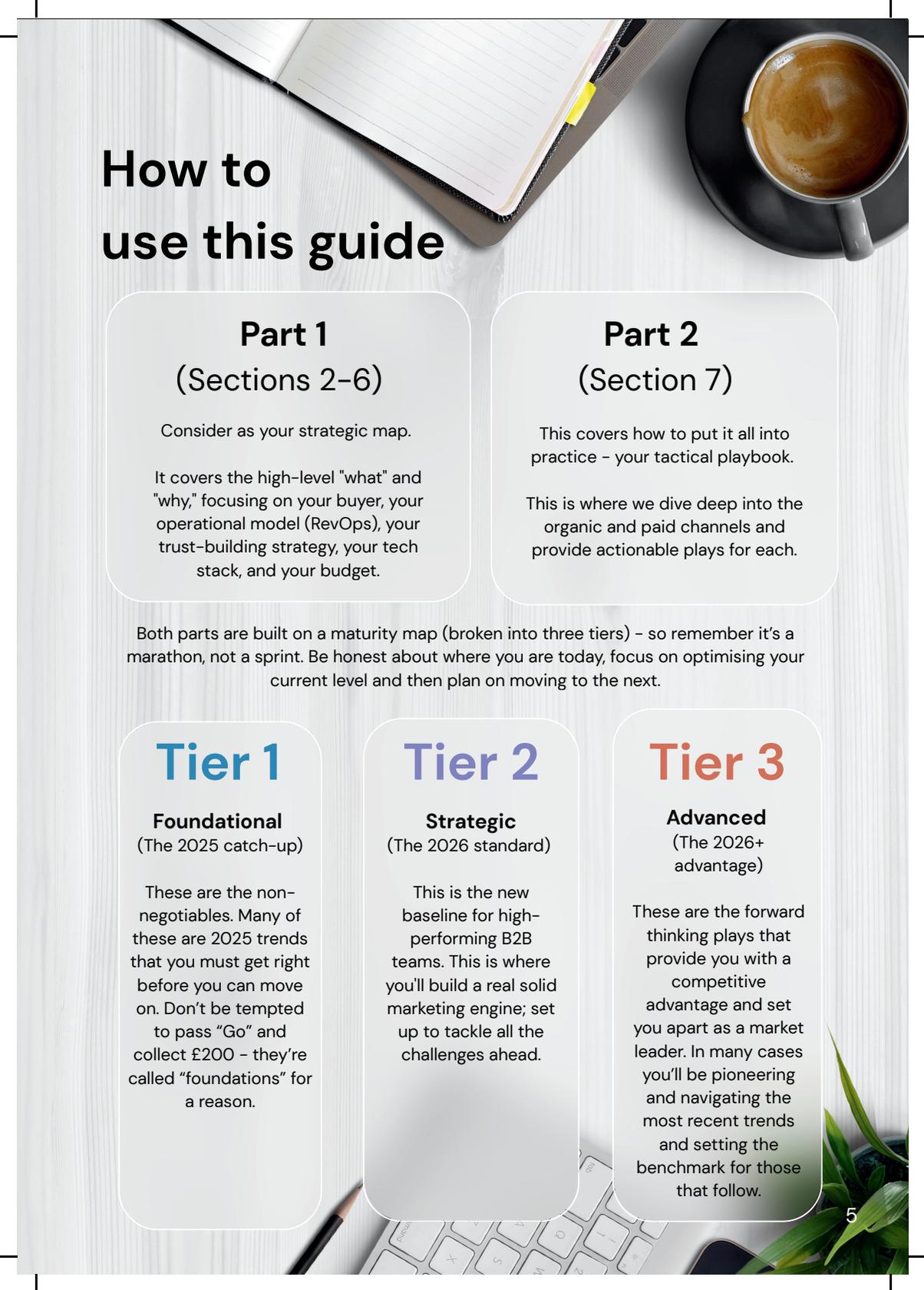
**For CMOs and Marketing leaders:** Focus on Part 1 (Sections 2 – 6). Pay close attention to Section 3 (RevOps) and Section 6 (Budget). Skim Part 2 (Section 7) to understand your team's tactical priorities.

**For Marketing Managers and Specialists:** Read the Executive Summary and Part 1 to understand the high-level strategy. Then, jump into your specific channel(s) in Part 2 (Section 7). This is your action plan.

**For B2B E-commerce Managers:** Read the Exec Summary and Part 1 for strategy. Then, jump to your dedicated playbook in Section 7.9.

**For PLG and Growth Marketers:** Focus on Part 1 to align with the core business strategy, then dive into your specific tactics in Section 7.10.

**For Channel and Partner Marketers:** Part 1 will help you align with the central business, but your dedicated playbook for driving "to-partner" and "through-partner" revenue is in Section 7.11.



# How to use this guide

## Part 1 (Sections 2–6)

Consider as your strategic map.

It covers the high-level "what" and "why," focusing on your buyer, your operational model (RevOps), your trust-building strategy, your tech stack, and your budget.

## Part 2 (Section 7)

This covers how to put it all into practice - your tactical playbook.

This is where we dive deep into the organic and paid channels and provide actionable plays for each.

Both parts are built on a maturity map (broken into three tiers) - so remember it's a marathon, not a sprint. Be honest about where you are today, focus on optimising your current level and then plan on moving to the next.

## Tier 1

**Foundational**  
(The 2025 catch-up)

These are the non-negotiables. Many of these are 2025 trends that you must get right before you can move on. Don't be tempted to pass "Go" and collect £200 - they're called "foundations" for a reason.

## Tier 2

**Strategic**  
(The 2026 standard)

This is the new baseline for high-performing B2B teams. This is where you'll build a real solid marketing engine; set up to tackle all the challenges ahead.

## Tier 3

**Advanced**  
(The 2026+ advantage)

These are the forward thinking plays that provide you with a competitive advantage and set you apart as a market leader. In many cases you'll be pioneering and navigating the most recent trends and setting the benchmark for those that follow.



At Embryo, we're all about the data and insights we bring our clients and we're excited to extend those findings to a wider audience.

2026 is set to be one of the most exciting years for digital advertising. Yes, competition is fierce and there are many changes, but with a smart strategy and a true omni-channel approach, the opportunity has never been greater.

This marketer's guide combines our team's channel expertise and our proprietary Supertools data alongside hours of research into what works for B2B marketers. We cover all the channels, budgets and opportunities for 2026, so we hope you enjoy reading and using it as much as we enjoyed creating it.

As an agency we don't just want to show what we're capable of, we want businesses to be able to turn our insights into actual performance.

Any questions along the way, the Embryo team will be happy to advise and support.

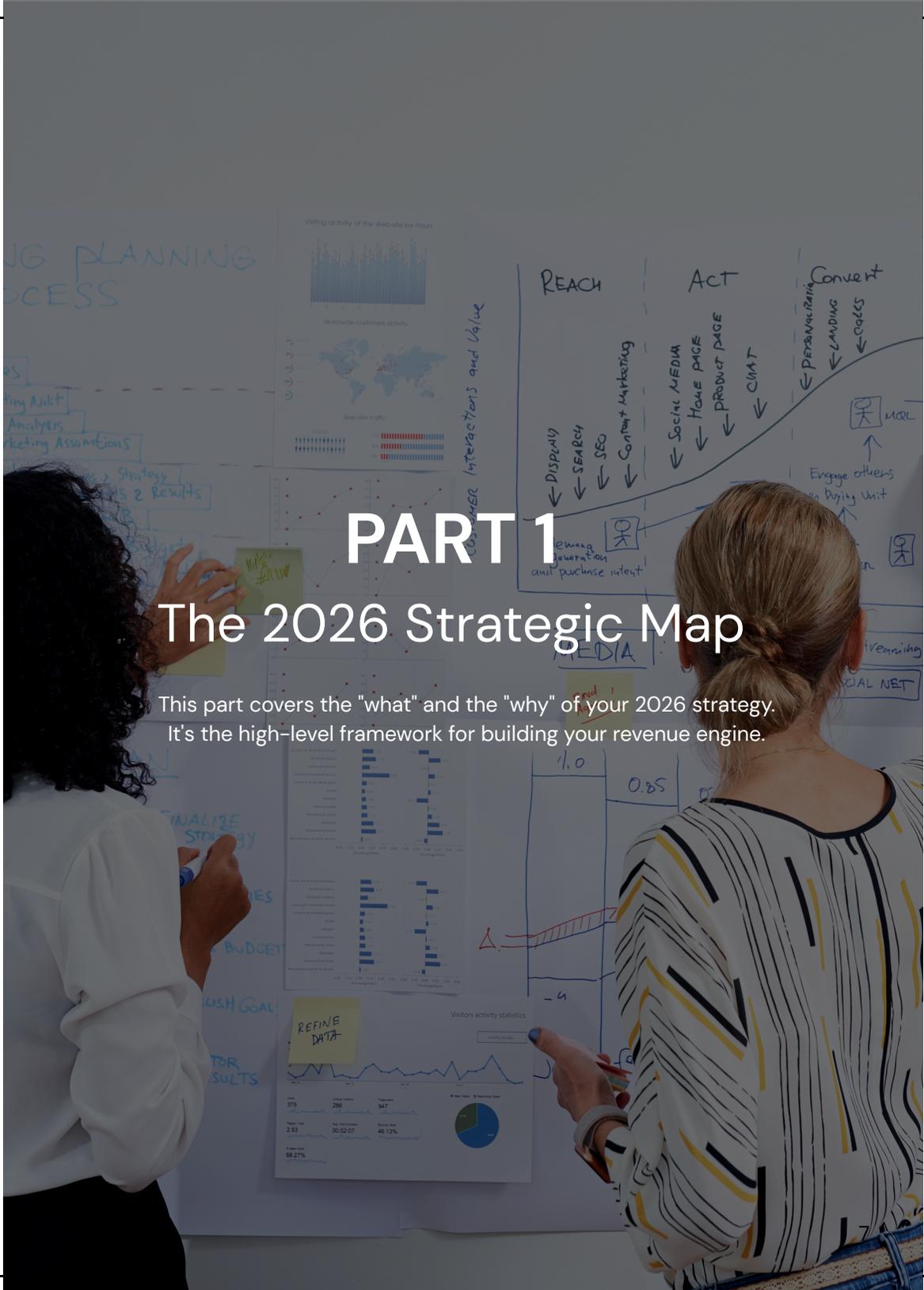
**James Guérin**  
**Chief Commercial Officer**



# PART 1

## The 2026 Strategic Map

This part covers the "what" and the "why" of your 2026 strategy. It's the high-level framework for building your revenue engine.



# Section 2:

## The buyer's revolution

**73%**

of B2B buyers are now Millennials and Gen Z

**61%**

of Gen Z buyers prefer to be rep-free

If your old tactics aren't working, it's because the "buyer" has changed. You're no longer marketing to one but, on average, to a 13-strong buying committee (Forrester). And whilst you try to satisfy each business personality, you also need to consider generational habits – Gen Z spend 83% of their journey without a salesperson. They are, however, also overwhelmed, with 77% calling their last purchase "highly complex" (Gartner).

Our new mandate is "buyer enablement." We must be sense-makers, not just persuaders. Our job is to make the complex purchase simple and to build trust with the entire committee.

### Tier 1

#### Play 1. Fix your data (before you do anything else)

Poor-quality data is the number one barrier to marketing performance (Hubspot). You cannot build a personalisation engine, an AI strategy, or an effective ABM model on a foundation of "John Smith" at "Jones & Co" in 10 conflicting formats. This is the single point of failure for your entire tech stack.

- **Audit:** Pull a 10% contact sample from your CRM. Manually check for duplicates, missing fields (job titles, industry), and formatting errors. This provides you with your baseline error rate.
- **Consolidate:** Invest in a data cleaning/enrichment tool (many of which are built already into your CRM, like HubSpot's Ops Hub) to de-dupe and normalise contact titles.
- **Govern:** Establish a "data governance" team that can meet bi-weekly with Sales Ops to align on key fields and create an internal agreement on terms like what "MQL" or "Enterprise" means internally – you'd be surprised how much they can vary and therefore lead to confusion within teams and tracking effectiveness.

**Tip:** Your number one goal is to create a "Single Source of Truth" (SSOT). This must be your CRM. All other platforms (email, ads, support) must read from and write to this SSOT. If your email platform has a different list than your CRM, you've already got a problem.

## Play 2. Master omnichannel consistency

Your buyer can be found in many places at once. The journey is digital-first, but that doesn't mean it's digital-exclusive. Your audience expects a consistent experience, whether that's on your website, via your socials or through interactions from your physical outreach.

- **Map:** Grab your Sales, Marketing, and Customer Success team and pull them into a room (or call) to map out every possible touchpoint within your customer's journey.
- **Integrate:** This is a big one, if you haven't done so already. Integrate your core systems (e.g., your CRM and site platform) to create a single customer view.
- **Test:** Act like you're one of your customers. Call the sales team (in disguise) and ask them what your last purchase was (or whatever is appropriate to your business). If they can't tell you, your systems are broken.

**Tip:** Pace yourself. Start by integrating just two of your systems – you'll no doubt by now have many within your tech stack. We advise starting within your CRM and your Marketing Automation platform. Seamless integration between just these two systems will be far more valuable than five shallow integrations elsewhere.

## Tier 2

### Play 3. Personalise at scale

Move beyond "Hi [First\_Name]" and use your (now clean) data to personalise every email, advert, and website experience to your prospect's industry, role, and buying cycle stage. The priority here is developing relevance, not familiarity with your prospect.

- **Segment:** Start with three using simple segments (e.g., "Customer," "Prospect – Enterprise," "Prospect – Small Medium Business").
- **Use dynamic content:** By using dynamic content blocks in your emails, you can show different case studies based on industry.
- **Use web personalisation:** Tools like HubSpot or 6sense can enable you to change your website's main headline based on their IP address (e.g., "The #1 CRM for Manufacturing" vs. "The #1 CRM for Finance"). You can only get one chance to make a good first impression, right?

**KPI to watch:** 'Conversion Rate by Segment' ... You're not just aiming for a higher conversion rate, but a dramatically higher rate for your personalised segments vs. your generic control group.

## Play 4. Use Digital Sales Rooms

A Digital Sales Room (DSR) is a single, private website link (a "micro-portal") you create for each qualified prospect. Instead of chaotic email threads with 10 attachments, the entire 13-person buying committee can access their personalised content, demos, and proposals in one place (Gartner).

- Get a tool: Invest in a purpose-built tool (like Allego, Highspot) or start simple by creating a password-protected page on your website.
- Create modular content: Your job as a marketer is to create the building blocks – short videos, single-page case studies, ROI calculators.

Enable sales: Train your sales team to easily drag-and-drop these "blocks" into a DSR for each new prospect.

Tip: This is marketing's secret weapon for influencing the entire committee. You get to see analytics on who is viewing what. Is the "Head of Finance" re-watching the pricing video? That's a critical buying signal you can pass to your sales rep.

## Tier 3

### Play 5. Move from ABM to ABX

ABM (Account-Based Marketing) is a targeted campaign ("Let's target these 50 accounts"). ABX (Account-Based Experience) is orchestrating a seamless, personalised journey across every single touchpoint, pre- and post-sale. It's ABM for the entire customer lifecycle.

- Connect data: Connect your post-sale data (like support tickets, product usage) with your pre-sale data (CRM, ad platforms).
- Pilot ABX: A simple example: A customer in your "Enterprise" tier files a negative support ticket. This creates two actions, automatically: it pauses any upsell ad campaigns to that account immediately and instead enrolls them into a "Here's how to get more value" nurture stream.

KPI to watch: Net Revenue Retention (NRR). ABX is measured by its impact on customer retention and expansion, not just the initial acquisition.

## Play 6. Host high-touch events

Moving beyond the 10,000-person trade show. With B2B experiential spend is soaring (Cvent), the real opportunity is in exclusive, high-touch events that build deep, human relationships with key accounts.

- Drop the Webinar: Ditch your next 1,000-person webinar. Instead, run a 15-person "virtual roundtable" for your top accounts with a high-profile speaker.
- Drop the stand: Instead of a huge trade show stand, host a private, 20-person dinner near the trade show for your 10 most-wanted prospects.
- Measure ruthlessly: Track how many attendees from the dinner moved to a "Sales Qualified Opportunity" within 90 days.

Tip: Send a physical, high-quality invitation. The more exclusive it feels, the more likely your BIG prospects are to attend.



## Play 7. Weaponise AI for buying signals

Stop waiting for your buyers to fill out a "Contact Us" form. Buying Signals are the digital breadcrumbs they leave across the entire internet. This play uses AI to spot those signals before they ever visit your site.

- Pilot a platform: Pilot a "predictive intent data" platform (like 6sense, Demandbase, or Bombora).
- Identify intent: This AI identifies accounts that are anonymously researching keywords related to your solution (e.g., "best CRM for manufacturing").
- Activate: Proactively target those "in-market" accounts with ads and sales outreach, before your competitors even know they exist.

This changes your marketing from "fishing with a net" (broadcasting) to "fishing with a spear" (precision). You focus 100% of your budget on the 3% of the market that is actively in-market to buy.

Tip: Use Google Alerts for your target keywords, set up keyword monitoring in a social listening tool (like Hootsuite or even a free Reddit tracker) to find discussions, and use LinkedIn Sales Navigator's "search alerts" to find accounts that match your ICP and have recently posted about your solution space. It's manual, but it's a more cost-effective way to find intent.

# Section 3:

## Revenue-centric operations

**What is RevOps?** Think of it as the central nervous system for your entire go-to-market. It's a cross-functional discipline designed to break down the historic (and often toxic) silos between marketing, sales, and customer success. It works by integrating all your GTM teams, processes, technology, and data into a single, cohesive system focused on one goal: driving revenue.

The C-suite expects you to demonstrate a clear line from budget spend to revenue. As a result, marketing teams are evolving to assist this alignment.

**75%**

of companies to operate under this set up by the end of 2025.

### A CMO's note on the political reality of RevOps

Before we dive into the "plays," we should address the single biggest barrier to RevOps: business politics. A RevOps model is a political and cultural realignment project.

True RevOps alignment is impossible until you can align your GTM incentives (this is the prerequisite to Play 10).

As a CMO, your first challenge is diplomacy, as this model forces a conversation with the C-suite about two sensitive topics

#### Ownership:

Who owns the RevOps function? Does it report to the CMO (you), the CRO, or the CFO?

Or, as is becoming best practice, is it an independent function, led by a Chief Revenue Officer, that holds all GTM teams accountable to one number?

There is no single right answer, but a lack of a decided answer is a guaranteed failure.

#### Incentives:

The silos between Marketing, Sales, and CS exist because their compensation plans are siloed.

Sales is paid on closed-won revenue, CS on net revenue retention (NRR), and Marketing on marketing qualified leads (MQLs).

These goals are often in direct conflict.

## Tier 1

### Play 8. Prove your contribution in £'s

Ditch those "vanity metrics" (social media likes, total sessions) for good. Every activity that you report on must be linked to pipeline generation and closed-won deals.

- Update your KPIs: Move to "Marketing-Sourced Pipeline," "Pipeline-to-Spend Ratio," and "Customer Acquisition Cost (CAC)."
- Attribute: Put your CRM's multi-touch attribution models (even a simple one) to good use, showing how marketing played a part in the deal, from the first blog post to the last ad they clicked.
- Build a dashboard: Create one simple dashboard, shared with Sales, that shows these metrics.

Tip: Start simple. A "First-Touch" or "Last-Touch" model that everyone agrees on internally is better than a complex multi-touch model that nobody trusts.

### Play 9. Think in terms of Customer Lifetime Value (CLV)

CLV is the amount of revenue you expect to achieve from a customer throughout their entire time with you. Many are still working in the "acquisition-only" mindset, but in honesty, our job doesn't end at the point of sale. The real profit is in retention.

- Buddy up with CS: Set up a regular meeting with your Customer Success (CS) team.
- Build an onboarding process: Develop an automated 90-day pathway for new customers to improve product adoption.
- Upsell: Launch your first upsell/cross-sell campaign to a stable (happy) customer segment. Learn and evolve.

KPI to watch: Net Revenue Retention (NRR) – this measures revenue from existing customers (renewals and upsells) minus any churn. A high NRR is more important than seeing new logos on your roster.



## Tier 2

### Play 10. Build a unified "revenue team"

High-performers are integrating into a single "Revenue Team" (often called "Revenue Pods") with shared data, shared KPIs, and shared accountability for revenue.

Tip: The magic happens when the marketer hears directly from the CS manager that "customers are confused by this feature," and can change the ad messaging that day. This feedback loop is the goal.

- Create a pilot "pod" for one market segment. Put one marketer, one BDR, one Account Executive, and one Customer Success Manager in a regular weekly meeting.
- Give them all one shared goal (e.g., "£200k in new ARR from the Manufacturing sector").
- Give them one dashboard to track this goal.

Tip: A pilot "pod" will eventually fail if its members are paid on conflicting metrics. The advanced play is to champion a new compensation model for your pod. Work with your CRO and CFO to create a shared team bonus based on the pod's single shared goal (e.g., "£200k in new ARR"). When everyone shares the same reward, the pod transforms from a "weekly meeting" into a true, accountable "Revenue Team."

### Play 11. Champion the new playbook internally

You have the strategy, but to execute, you need buy-in. Many of these plays (like "Zero-Gate" or "Educate, don't sell") may face internal resistance from a sales-led C-suite. Therefore your job is to be an internal champion and prove the value in their language.

- Find a sales champion: Find one Account Executive or BDR who shares your mindset. Co-launch a pilot "Revenue Pod" (see Play 10) with them. Use their success story as your internal case study.
- Launch a low-risk pilot: Don't ask to un-gate all your content (see Play 20). Ask to test it on one content pillar for one quarter. Frame it as a pilot with clear "Go/No-Go" metrics (see Section 6).
- Speak their language: Instead of "brand building," say "lowering long-term Customer Acquisition Cost (CAC) by reducing our dependency on paid channels." Instead of "E-E-A-T," say "using our in-house experts to build trust so deals close faster."

Tip: Use data from your own systems. Show your CRO a report: "Our sales cycle for prospects who read the blog is 30% shorter than for those who only see ads." This is the data that changes minds.

## Play 12. Balance the funnel (Demand Gen vs. Demand Cap)

The pressure for immediate, bottom-of-funnel leads is the biggest challenge for 39% of us (Hubspot). This is "Demand Capture" (grabbing buyers already looking for you). But this pool is small and expensive. "Demand Creation" is the long-term brand building that creates new demand.

- Earmark: Formally allocate 20–30% of your budget to "Demand Creation" (e.g., ungated content, thought leadership) that has no lead-gen CTA.
- Execute: Launch a podcast or video series focused only on your buyer's problems, not your solution.
- Measure (differently): Do not measure this with MQLs.

KPIs to watch:

Primary: Brand Search Uplift (YoY), and Share of Search. (Note: As generic organic traffic fluctuates due to AI Overviews, Brand Search volume becomes your truest measure of demand creation).

Secondary: LinkedIn Share of Voice, Content Consumption (e.g., podcast downloads).



## Tier 3

### Play 13. Adopt a full operational model (Speak like a CFO)

This is the RevOps end-state. It's when you've moved beyond just aligning teams to fully integrating your people, data, and processes directly with finance and ops. You're running marketing like a business unit, speaking the language of the C-suite.

- Define your metric: Your new North Star metric is MER (Marketing Efficiency Ratio). It's your ultimate CFO-friendly metric:  $\text{Total Revenue} / \text{Total Marketing Spend}$ .
- Build the dashboard: This is the hardest part. You must build a dashboard that pulls data from your finance platform (revenue) and your ad platforms (spend) into one place.
- Report on it: Present this metric in every QBR.

Tip: You can also track MER by channel to see which programs are truly driving efficient growth and which are just driving high-cost, low-value leads. This is how you make ruthless, data-backed budget decisions.

# Section 4:

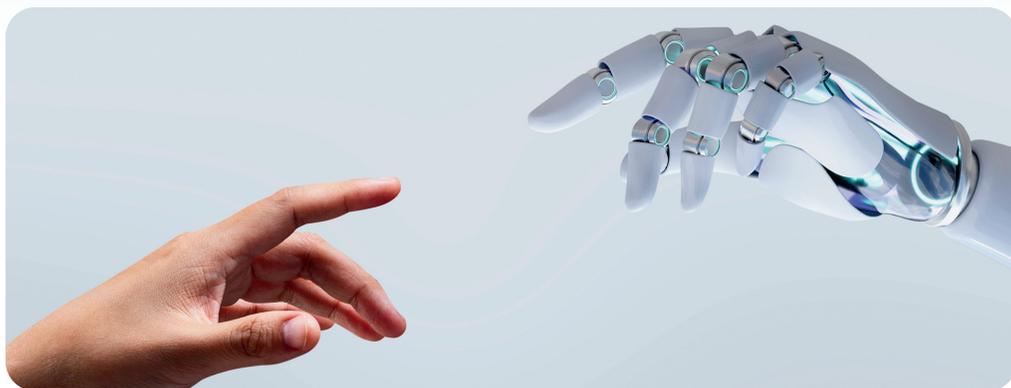
## Building trust

In a market saturated with generic AI content, **authenticity, authority, and human connection** are your most valuable assets.

This is where the "human" part of our "human + machine (AI)" model becomes our superpower. Be the brand that buyers trust before they even need your product.

# 40%

of marketers cite AI's lack of humanity as one of its biggest drawbacks



### Tier 1

#### Play 14. Educate, don't sell

Stop leading with "Book a Demo" and lead with "Here's how to solve your problem." This positions your brand as a trusted advisor, not a product-pusher.

- Audit your content: Do a simple audit of your last 10 blog posts. How many are about your product vs. your customer's problem?
- Repurpose: Take your best-performing (gated) whitepaper. Turn it into an ungated, 10-part blog series.
- Share freely: Create a simple "problem/solution" framework and share it on LinkedIn with no links back to your site.

Tip: A good rule of thumb is the 90/10 rule. 90% of your content should be pure, un-gated education. 10% can be about your product. This system builds an audience that trusts you, so when they are ready to buy, you are the one they call.

## Play 15. Dominate with short-form video

Short-form video (under 90 seconds) is a preferred consumption format for B2B buyers and is dominating professional networks like LinkedIn. It's the new "blog post."

- Use your phone: Record your Head of Product on their phone explaining a complex feature in 60 seconds.
- Clip webinars: Take your last webinar, find the three best insights, and clip them into 30-second videos.
- Add captions: Most videos are watched with the sound off. Post natively.

Tip: Consistency beats production value. A raw, authentic video from your CEO on their phone will outperform a polished corporate video every time. Post once a week.



## Play 16. Scale employee advocacy as a core media channel

Your buyers trust your people (your engineers, your sales team) more than your brand logo. This play means getting serious about amplifying their voices. Their combined network is 10x larger than your company's.

KPI to watch: Earned Media Value (EMV). Track the total engagement and reach from your employees' posts. This is the media reach (earned) that you didn't have to pay for.

- Stop being generic: Stop force-feeding corporate content to your team.
- Find champions: Pick your internal "brand champions" (5-10 if you can) who are already active on LinkedIn.
- Get them up to speed: Give them a training session on how to effectively build their personal brand – tactics may sound simple to you, but they'll be mindblowing tricks to those outside of marketing – even if they already think they're doing a decent job. If you want to help them further, give them a tool (like EveryoneSocial or Hootsuite Amplify) to make sharing and creating their own insights easier.

## Tier 2

### Play 17. Turn your CEO into a brand

Empowering your CEO or founder to become a "creator CEO" by building their own media platform – a podcast, newsletter, or video series. People trust people, and this builds a "halo effect" of trust for the company they lead.

- Every CEO is busy. So, start with a 15-minute, twice-a-month podcast or a simple, text-only "CEO's Reflections" newsletter to kick things off.
- Focus on industry: The content must be about industry insights, not your product.
- Ghostwrite (at first): The marketing team can "ghostwrite" the first few newsletter drafts based on an interview with the CEO to get the ball rolling. After that, and hopefully seeing success, get your CEO more involved – that authenticity will shine through.

Tip: Authenticity and a strong opinion is key. A generic, safe CEO post is kind of pointless. A post, however, that takes a stand (e.g., "Why 90% of AI strategies will fail") is what builds an audience.

### Play 18. Become the lead facilitator of a niche community

Build the space where your ideal customers collaborate. This means an exclusive, neutral community about the profession of your buyer, not about your product.

- Launch a private Slack or Discord channel.
- Invite your Top 50: Invite your top 50 customers and 20 "dream" prospects.

Tip: The value of your community comes from members talking to one another, not you talking to them.

### Play 19. Leverage "Dark Social"

"Dark Social" refers to all the conversations you can't track (private Slack channels, LinkedIn DMs, forums, text messages). This is where 83% of B2B sharing happens (Gartner).

- Assign one person internally to spend 30 minutes a day in the top subreddits or LinkedIn Groups for your industry.
- Their job is to listen and take some notes – nothing else. Find out – What are the common complaints? What new trends are emerging?
- After 30 days, their job is to help and answer questions, not post links to your site.

Tip: The insights you gather are your best source for future content ideas. If people in a forum are complaining about "X," then your next blog should challenge it: "The 5-Step Guide to Fixing X."

## Tier 3

### Play 20. Implement a "Zero-Gate" content strategy

This means ungating your high-value expert reports and guides. The old model is built on friction; this new model is built on trust. It assumes 97% of your audience isn't ready to buy, so your goal is to educate them, not capture them.

- Start by "un-gating" all high-value content that's more than 6 months old.
- For your next big report, make the full PDF ungated but offer a "bonus" (like a private webinar on the data or the raw data file) in exchange for an email.
- Use your ad pixels to retarget website visitors who read the ungated report.

KPI to watch: Content consumption + pipeline velocity. You're betting that an educated, trusting prospect will move through your pipeline faster when they finally do engage.

### Play 21. Pioneer blooper marketing

When everyone else is busy being perfect, be the one instead that shares its failures. Buyers are tired of brands claiming to be flawless. This is your chance to be strategically honest.

- Write a blog post titled "Three Things We Got Wrong Last Year (And What We Learned)."
- Be honest: Share the problem, the failed solution, and the lesson.
- On your "competitor comparison" page, be honest. "Competitor X is better than us if you are a one-person business. We are built for teams of 10+."

Tip: This builds instant trust with your buyer - "If they are this honest about what they're bad at, then surely I can trust what they say they're good at, right?"

### Play 22. Develop a sonic identity

A "sonic logo" is a short, unique sound for your brand (like the Netflix "ta-dum", the McDonalds "whistle" or Intel's 5-note chime). With podcasts and short-form video all the rage, this makes your brand sound as consistent as it looks.

- Commission a 5-second intro/outro track from a site like Fiverr or by hiring a sound designer if you've got a bit more budget to stick at it.
- Use it as the intro/outro on all your videos (short and long-form).
- Don't stop there, give the audio file to your sales team to use in their personalised video outreach (with perhaps some guidance on how to integrate it).

# Section 5:

## The human and the machine

In the last few years, AI has moved from novelty to common practice, with 88% of organisations now using it in at least one business function. However, this adoption is still in its early days; nearly two-thirds of companies are still in the experimentation or piloting phase.

**95%**

of AI projects fail, but not because of tech, because of strategy problems.



**62%**

of organisations are experimenting with AI agents

“Agentic AI” is all the buzz right now – systems that can plan and execute tasks. However, “don’t believe everything you see online” – while there is great promise, we’re not ready just yet. 62% of organisations are experimenting with agents, although very few have scaled them.

The challenge, 95% AI projects are failing. This isn’t just a tech problem, though – it’s a strategy and data problem. In fact, only 39% of companies have reported any enterprise-level EBIT impact from AI so far. So don’t worry, you’re not behind!

## A leader's note on change management

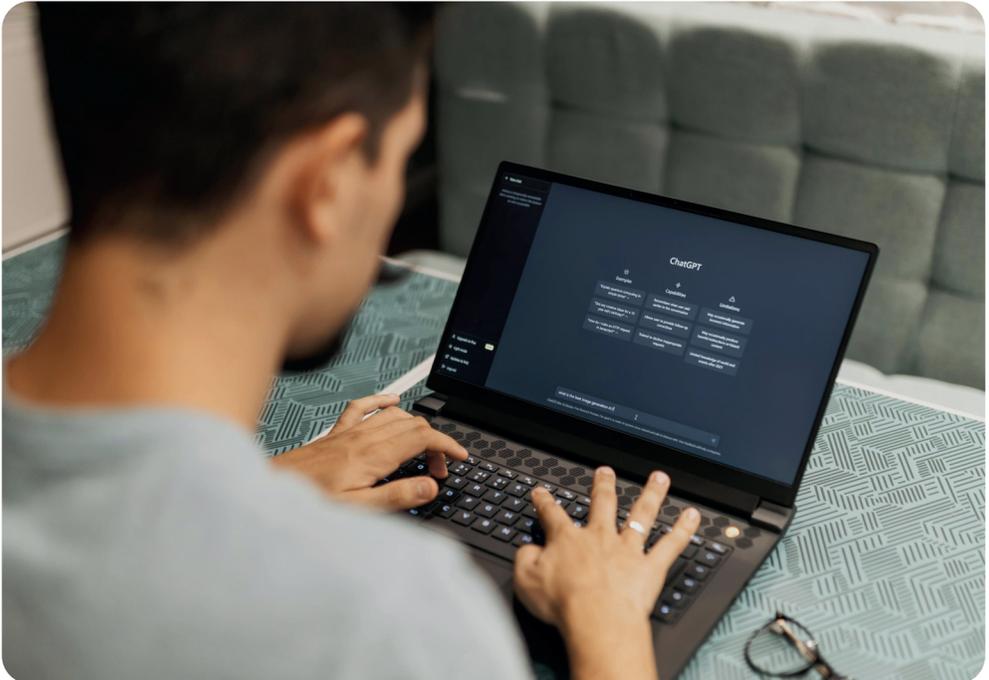
As a marketing leader, AI adoption is both a technical and human change management challenge.

Your team's anxiety about job security is a bigger barrier to success than your tech stack. They are not just "upskilling" (Play 27); they are facing an existential shift in their professional identity.

**Your job is to be the empathiser first. You must proactively reframe this change:**

- AI is not here to replace the marketer; it's here to accelerate them.
- It is a "co-pilot" that automates the mundane (data analysis, first drafts, report pulling) to elevate the human (strategy, creativity, customer empathy, building bridges with sales).

Every play in this section must be introduced through this lens. Your team's willingness to embrace AI is directly proportional to their trust that you are using it to augment them, not replace them.



## Tier 1

### Play 23. Use AI for productivity (the right way)

50%

of B2B marketers  
credited AI with  
helping them meet  
their role  
expectations

Of UK B2B marketers surveyed, 50% credited AI with helping them meet their role expectations (SurveyMonkey) – the others are problem just being modest. In all seriousness though, if your team isn't using AI to automate repetitive tasks, analyse performance data, or to generate first drafts, you are getting behind.

- Get licenses: Get your whole marketing team Pro licenses for your chosen AI tool (ChatGPT, Claude, etc.).
- Create a prompt library: Create a shared "Prompt Library" with 10-20 proven prompts for your brand voice, blog outlines, and ad copy variations.
- Train: Run a 1-hour "lunch and learn" where team members share their best prompts.

Tip: The biggest win is content repurposing. Use AI to "Act as a social media manager" and turn one blog post into 10 LinkedIn posts, 5 email subject lines, and a 30-second video script. This scales your content engine.

### Play 24. Humanise AI for sales enablement

Instead of just automating outreach, use AI to deepen human connection. This means deploying the AI tools already in your stack (like in your CRM) to help your sales team be more human, not less.

- Activate CRM AI: Activate the AI features already in your CRM (like Salesforce Einstein or HubSpot AI).
- Use summaries: Mandate the "call summary" feature. This saves your sales team 30 minutes a day of note-taking.
- Use tone analysis: Train them on the "tone analysis" feature to help them draft more empathetic emails to difficult prospects.

Tip: Work smarter, not harder. AI can summarise your call, extract the prospect's key concerns and next steps, and then pull together a 90% complete follow-up email in seconds.

## Tier 2

### Play 25. Invest in AI-enhanced team coaching

Investing in "conversation intelligence" (CI) systems that can analyse 100% of your sales calls, presentations, and email interactions to provide instant, personalised feedback on messaging and tone.

- Pilot a tool: Pick something like Gong or Chorus and trial it on 3 – 5 of your sales reps.
- Analyse calls: These tools will then record, transcribe, and analyse their sales calls.
- Find what works: Marketing can use this data to find out which talking points and competitor mentions actually lead to closed deals, so you can train the whole team on what works.

Tip: This is marketing's direct line into the buyer's voice. Listen to these calls to hear, in their own words, what their problems are. This is infinitely better than a survey.

Tip: A Gong licence is not in the budget for most small teams. The alternative? Commit to manually reviewing one recorded sales call (using a free transcriber like in Teams or Zoom) for one sales rep, every week. You will get 80% of the insights, including the exact language buyers use, their objections, and competitor mentions, for 0% of the cost.

### Play 26. Forge strategic GTM partnerships

Realising you can't (and shouldn't) do it all in-house. High-growth companies are increasingly outsourcing to specialist partners to gain a competitive edge.

- Do a skills gap analysis: Audit your team. Are you weak in performance marketing? Are you new to GEO?
- Hire fractional: Instead of hiring a full-timer, hire a specialist fractional agency.
- Mandate training: The agency's contract should include "execution" and "training," so they upskill your team while running the campaigns.

Tip: The modern agency relationship is built on outcomes, not hours. Pay for strategic value (like pipeline-to-spend), not just a retainer for a set number of hours.

## Play 27. Upskill for "human-only" advantages

As AI (Play 23) and agents (Play 29) take over the "doing," your team's value must shift to what AI cannot replicate. Your new job is to invest in the "human skills" that make the machine valuable.

- Do a skills gap analysis: Audit your team. Are you weak in performance marketing? Are you new to GEO?
- Hire fractional: Instead of hiring a full-timer, hire a specialist fractional agency.
- Mandate training: The agency's contract should include "execution" and "training," so they upskill your team while running the campaigns.

Tip: The modern agency relationship is built on outcomes, not hours. Pay for strategic value (like pipeline-to-spend), not just a retainer for a set number of hours.



Download our AEO  
GEO guide:



## Play 28. Support new commercial models

The B2B world is rapidly shifting to subscription and consumption-based pricing (where customers pay for what they use). This is a critical marketing shift.

- Shift your mindset: Your marketing job must shift from "selling the product" to "encouraging usage."
- Partner with product: Partner with the product team to identify low-usage triggers.
- Nurture for usage: Create an email nurture campaign triggered by low-usage, aiming to show a user a new, valuable feature to get them hooked.

KPI to watch: Product-Qualified Lead (PQL). This is a user who, through their in-product actions, has shown signals that they are ready to be upsold to (e.g., they've used 90% of their data limit).

## Tier 3

### Play 29. Prep for Agentic AI

This is the leap from AI as a tool to AI as a teammate. "Agentic AI" refers to autonomous AI systems that can independently plan and execute complex tasks (e.g., "Analyze our top 5 competitors' Q3 marketing, identify their main value prop, and draft a counter-campaign").

- This is advanced. Start by following the research from firms like Gartner and platforms like OpenAI.
- Pilot one of the emerging agentic tools in a "sandboxed" (safe) environment with non-critical data.
- Your job will change from the operator ("I will write an ad") to more of a manager ("AI run a campaign to this audience, with this budget, and report back to me on the MER").

Tip: The marketer who can prompt, manage, and quality-check a team of AI agents will be infinitely more productive than the marketer who can't. Invest time into and training in development.

### Play 30. Get immersive with AR and VR

For industries with complex products (like manufacturing or SaaS), Augmented Reality (AR) and Virtual Reality (VR) are becoming powerful sales tools. They let you put your product in the customer's hands, virtually.

- Physical products: If you sell a physical product that is complex, then try creating a simple AR model that lets a buyer "place" your product in their real world environment using just their smartphone.
- SaaS products: If you sell complex software, then create a self-guided interactive demo (using a tool like Navattic or Walnut) that allows them to "click around" in a safe environment.

Tip: Add your AR link or interactive demo to your DSRs (Play 4) to accelerate the deal.

### Play 31. Make accuracy and ethics your differentiator

As AI becomes the norm, trust is diminishing. Buyers are concerned about their data privacy, but the biggest risk businesses face from AI today is actually inaccuracy. In 2026, demonstrating responsible and reliable AI will be a key differentiator.

- Create and publish a "Responsible and Reliable AI Policy."
- Clearly state how you use (customer) data to train your AI models (or, more importantly, how you don't!).
- Giving your sales team a one-pager on this can be a powerful tool to overcome procurement objections.

Tip: This is not just a legal requirement; it's a brand differentiator. Being the "ethical choice" is a powerful position in a market full of black-box AI.

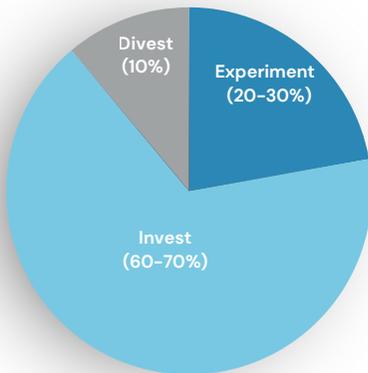
# Section 6:

## Funding 2026

That "do more with less" mantra isn't going away. However, "less" doesn't necessarily mean smaller. It means smarter. With 63% of us feeling the heat from finance to prove ROI (Gartner), we're expected to self-fund our own growth through efficiency. When preparing your budget, think in three buckets ("**Invest**," "**Experiment**," and "**Divest**") that map to your business maturity.

### Strategic spend (The "Experiment" bucket: c. 20-30%)

This is your R&D budget. This is where you fund your Tier 2 and 3 plays to build your future competitive advantage. This includes mastering GEO, piloting a community, or testing new AI tools. This is also the hardest bucket to get signed off.



### Funding the future (The "Divest" bucket: c. 10%)

Be ruthless. We all have that martech tool we bought in 2023 that no one uses. We all have that legacy campaign that used to work. Cutting this 10% is what funds your "Experiment" bucket.

- Run a "cost vs. adoption" audit. That £10k/year subscription tool used by only two people? Cut it. That campaign with a 3x CPL compared to the benchmark? Cut it.
- How to justify it: "We are divesting £20k from underperforming legacy programs and re-allocating it to two strategic pilots with 10x potential."

### Foundational spend (The "Invest" bucket: c. 60-70%)

This is your core budget. It's not just 'keeping the lights on'; it's doubling down on what works and fixing what's broken.

- What it funds: Your Tier 1 plays. This is your core tech stack (CRM, Marketing Automation), your server-side tagging implementation (Play 55), your data cleanup (Play 1), and, most importantly, upskilling your team (AI, data analysis).
- How to justify it: "Our data is 30% inaccurate, leading to a 15% email bounce rate and 20% wasted sales time. A £5k data-cleaning project will return £50k in sales efficiency and campaign performance."

## How to build the business case for your "Experiment" budget

Your CFO and board don't speak in MQLs; they speak in MER (Marketing Efficiency Ratio), CAC Payback, and Pipeline. You must frame your "experiments" in their language.

### 1. Speak like the CFO

#### Instead of...

I want to launch a podcast to build our brand.

#### Try:

Our Demand Creation 'experiment' is a 12-month pilot. We won't measure it on leads. We will measure it on its leading indicators: a 15% lift in 'Brand Search' volume and a 10% increase in 'Direct Traffic' to our site, which we correlate to a 5% reduction in CAC over the long term.

### 2. Use the "Pilot Proposal" framework

Don't ask for a permanent budget line. Ask for funding for a 6-month, time-boxed pilot.

#### Hypothesis:

"We believe that by building a 15-person "virtual roundtable" (Play 6), we will accelerate our Top 20 accounts, moving them from 'Awareness' to 'SQL' 50% faster than our standard webinar."

#### Metrics

Leading: 80% attendance rate -> 50% of attendees book a follow-up.

Lagging: £500k in pipeline influenced -> 90-day reduction in sales cycle for attendees.

#### Go/No-Go point:

"After 6 months, if this pilot has not influenced at least £250k in new pipeline, we will kill it and re-allocate the funds. If it succeeds, we will present a case to scale it."

### How to model for small teams

#### Focus on efficiency:

"I want to test a £1k/year AI content repurposing tool (Play 23). My hypothesis is it will save 10 hours per week of manual work, allowing my specialist to focus on high-value strategy. This £1k tool unlocks £15k in strategic value."

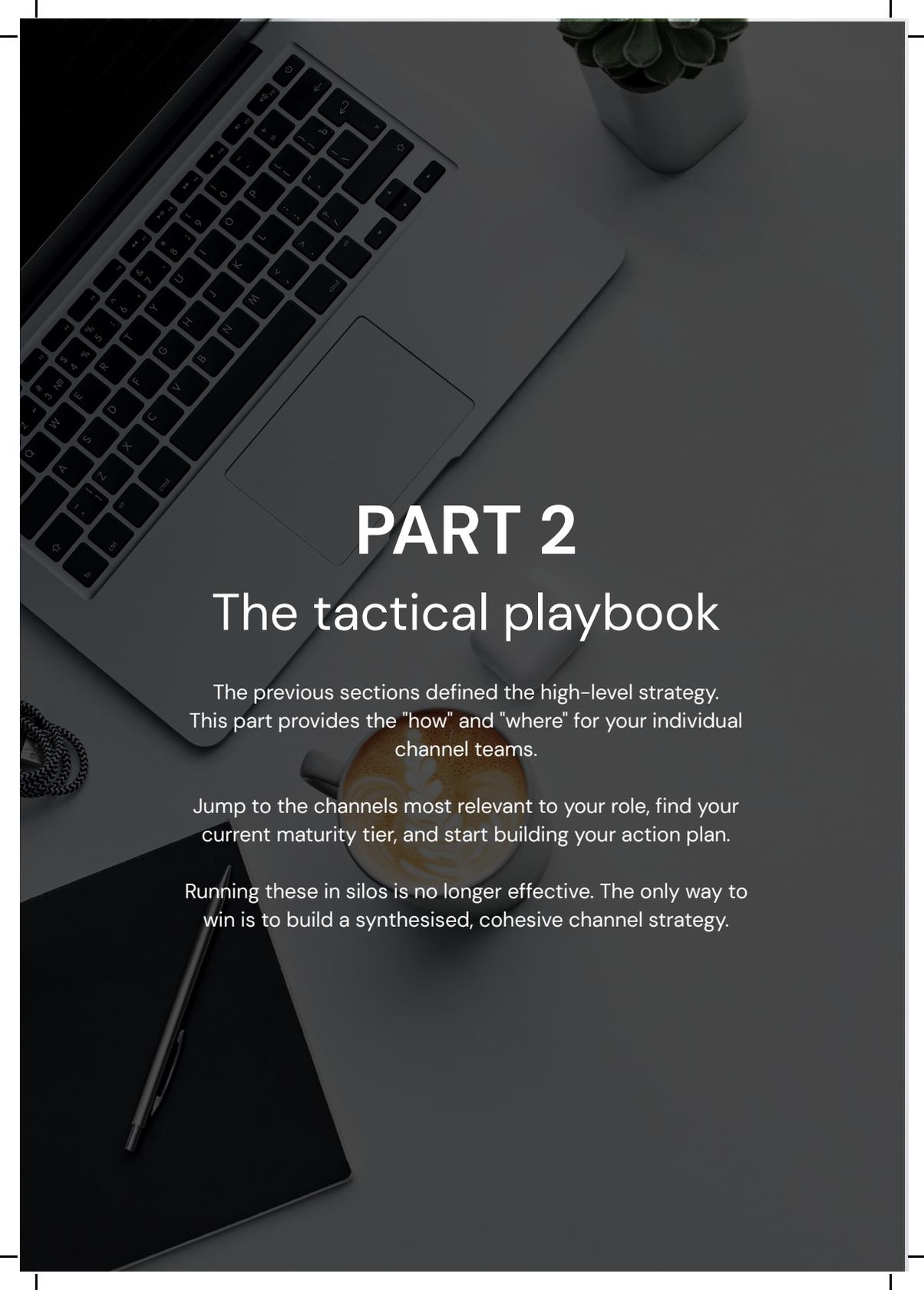
#### Start with zero-cost tests:

Before asking for a 6sense pilot, run the budget version (Play 7 tip) for 60 days. Prove the concept works with manual effort, then present the data to justify the platform that automates and scales it.

## Sample budget allocation (for a CFO-ready conversation):

Category	Allocation	Trend (vs 2025)	Key Focus (CFO-Friendly Language)
People (Salaries and Training)	40%	-5%	Re-allocate headcount savings from AI-driven productivity into strategic upskilling to increase output per employee.
Technology and Data	25%	+5%	Invest in core infrastructure (CRM, Server-Side Data) to improve data integrity, which directly fuels AI efficiency and ensures 100% compliance.
Programs and Campaigns	35%	Stable	70% of this spend is on proven, high-MER (Marketing Efficiency Ratio) channels. 30% is allocated to time-boxed pilots to find the next high-MER channel.



A dark, top-down view of a desk. In the upper left, a portion of a silver laptop is visible, showing the keyboard and trackpad. In the upper right, there is a small potted plant with green, rounded leaves. In the lower left, a black notebook with a silver pen resting on it is visible. In the lower center, a white coffee cup with a latte art design sits on a white saucer. The background is a dark, textured surface, possibly a desk or a wall.

# PART 2

## The tactical playbook

The previous sections defined the high-level strategy. This part provides the "how" and "where" for your individual channel teams.

Jump to the channels most relevant to your role, find your current maturity tier, and start building your action plan.

Running these in silos is no longer effective. The only way to win is to build a synthesised, cohesive channel strategy.

# Section 7.1

## SEO: From rankings to total visibility

For years, the primary goal of SEO was to achieve the number one ranking. Now, it's about being as visible as possible across many different platforms. The core message is increasing your brand visibility. This strategy includes several key components:

- Aligning performance with leads and business goals, not just traffic volume.
- Creating content that supports the entire internal business buying journey.
- Distributing messages across multiple platforms where your buyers build trust.
- Using content (like proprietary data) as a tool for outreach.
- Optimising for AI as one part of search.
- Focusing on clear measurement and attribution.



### Tier 1

#### Play 32. Strengthen your technical foundation

Your best content is worthless if search engines and AI crawlers can't navigate or trust your site. Technical SEO has become a firm non-negotiable foundation for all modern visibility, as web crawlers love well-structured, fast-loading sites. It's a great trust signal.

- Continuously monitor and optimise your Core Web Vitals (CWV) to create a fast, stable, and trustworthy site that crawlers are searching for. Use tools like Google's PageSpeed Insights or Screaming Frog to help find the biggest issues/opportunities (e.g., uncompressed images) to improve your site.
- This is how you signpost to search engines and AI algorithms what your content is, who wrote it, and why it's credible.

Tip: Start with "Organisation" and "Article" schema. Then, implement "Author" schema that links to a dedicated author page for your expert, proving their "Expertise."

### **Play 33. Focus on leads, not just traffic**

The "Top-of-Funnel" (TOFU) informational traffic we all used to report on is shrinking. AI Overviews and answer engines are handling many simple queries, meaning fewer clicks for basic "What is..." articles.

This is a good thing, though, as it filters out low-intent noise. A user who bypasses an AI summary to actually click and read your in-depth guide is a highly qualified lead.

- Shift content focus from high-volume (TOFU) to high-intent Mid-to-Bottom-Funnel (MOFU/BOFU) content: While "What is..." articles still play a role in building brand awareness, your focus should be on content that accelerates the deal cycle.
- Examples: "Competitor X vs. Y" comparisons, "How to implement [Your Solution]" guides, or detailed "Best [Product for Niche]" articles.

**KPI to watch:** Page-Level Conversion Rate. You'd rather have 100 visitors with a 5% conversion rate than 1,000 visitors with a 0.1% conversion rate.

### **Play 34. Prove your "Experience" with E-E-A-T**

Google's E-E-A-T framework (Experience, Expertise, Authoritativeness, Trustworthiness) is the best way to build trust with both users and the search engines.

AI can process and handle lots of existing information, but what it can't do is create first-hand "Experience."

So this is your advantage to seize.

- Budget for research: Your content strategy should be built around your team's unique insights. Set aside some cash for proprietary research (e.g., "The 2026 State of Manufacturing Report") and original data, which can then be used for outreach.
- Publish case studies: Create thorough client case studies that support the buyer in their journey.
- Use employee-generated content (EGC): Build content around your subject matter experts who should share their personal, behind-the-scenes perspectives. This is an asset that AI can not replicate.

**Tip:** When you publish a post created in collaboration with an employee, add a line like, "We've implemented this for 30 clients. Here's what we learned." This is a direct, unmissable signal of "Experience" for both Google and the reader.

## Tier 2

### Play 35. Adopt a "distributed web presence"

The previously predictable and linear "assumed journey" (Awareness -> Interest -> Consideration -> Convert) is no longer accurate. As our New Organic Playbook highlights, the "search journey now orbits behaviour". The buyer in 2026 might start on an AI platform, move to YouTube for tutorials, check Reddit for "unfiltered, trusted opinions", and then return to a search engine for comparisons.



Download our New  
Organic Playbook:



A "website-only" SEO strategy only covers part of the picture.

- Map platforms: Ask, "Where is your audience searching and at which stage in the funnel?". Map all the platforms where your buyers build trust and seek content.
  - For example, a user in the 'Awareness' stage for legal advice might use Google, YouTube, and TikTok.
  - That same user in the 'Consideration' stage might shift to Google, YouTube, Meta, and Reddit.
  - This happens because search is shaped by platforms: users go to TikTok for "visual, emotional and human" content, but to Reddit for "unfiltered, trusted opinions" or Amazon for reviews and proof.
- Optimise everywhere: Your brand must be visible and authoritative on all of them. Collaborate with your Social Team to align on "Social Search" (see Play 70). This means starting a YouTube optimisation program (video titles, descriptions) and creating an authentic community engagement strategy for relevant subreddits to build authenticity (see Play 19).

Tip: Your new goal is to own the "Share of SERP". When someone Googles your brand name, you should own the entire first page - not just with your website, but with your LinkedIn profile, YouTube channel, brand upvotes or mentions, and positive reviews.

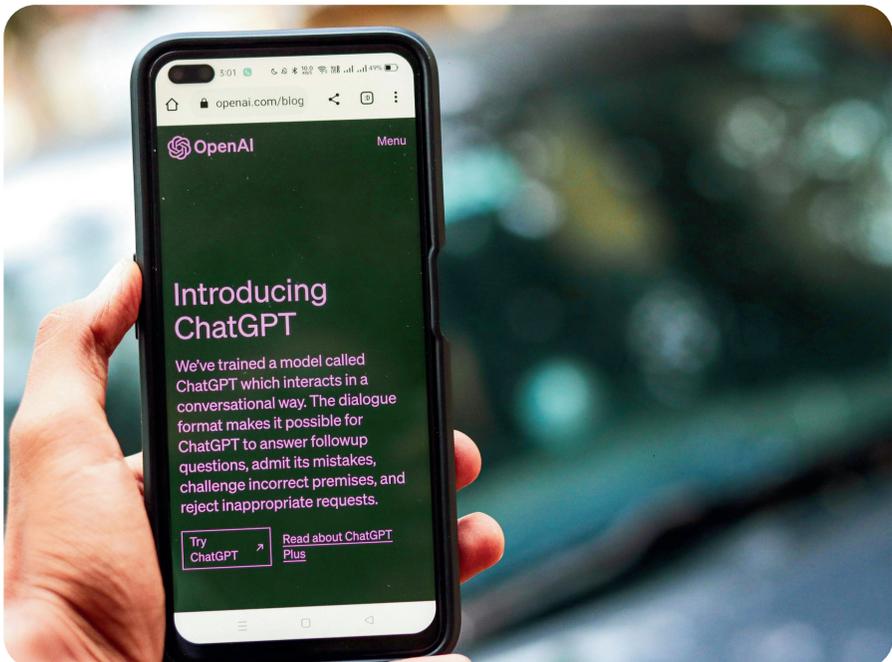
## Tier 3

### Play 36. Optimise for AI as one part of search

While AI is just one part of your overall SEO strategy, your goal should be to influence and appear in AI-driven answers. This isn't a new discipline; it's an extension of modern SEO focused on "zero-click influence"—being the trusted citation for complex queries.

- Identify questions: Use your sales team's call logs (see Play 25) to find the complex, high-stakes questions your buyers have.
- Create the asset: Write the ultimate, data-backed answer. Include your proprietary data, charts, and expert quotes.
- Structure for AI: Ensure your content is clear in its structure (think "question-and-answer") with <h2> tags for the questions and by using schema markup to make it easy for the search engines to ingest.
- Amplify with Digital PR: Make some noise by actively promoting your content to build that digital word-of-mouth effect. The more relevant, authoritative publications, forums, and experts link to or mention your asset, the more AI models will recognise this as a trust sign and a foundational source of truth. Your goal is to be mentioned in as many high-quality places as possible.

Tip: You are building a tower of trusted information. The goal is to be cited. Track "unlinked brand mentions" (a key Digital PR metric) and "direct traffic" as leading indicators of success, feeding into your overall measurement and attribution.



## Hear from the experts...



How we measure the performance of organic search has been changing for a while and this is going to continue into 2026. For B2B brands, it hasn't been about 'ranking number one' for a long time, and as Google adds more SERP features, AI surfaces, and buyers increasingly use multiple platforms to research solutions, your share of the SERP becomes the metric that matters.

What you need to consider now is how visible and trusted your brand is across the full decision-making landscape?

Visibility now spans far beyond the traditional 10 blue links.

It could be a Digital PR placement ranking for an industry problem, a brand mention in a comparison piece on a publisher site, expert commentary pulled into AI Overviews, discussions about your solution on Reddit or LinkedIn, or UGC on TikTok explaining your product category.

For B2B, this multi-surface visibility is what generates leads, because buyers don't just search, they validate. And the more present your brand is across the SERPs they encounter, the more likely you are to be shortlisted.

**Jess Atkinson**

**Organic Search Director**



## Section 7.2

### Digital PR: The new driver for E-E-A-T

We've reached an inflection point for B2B Digital PR. AI is maturing, new UK regulations are being introduced, and the search landscape is changing day by day. For B2B brands, Digital PR is no longer solely a one-way communication function; it is a real growth driver that builds authority, earns visibility across AI and human search, and turns that earned brand trust into your pipeline.

This, therefore, requires a shift from reactive, link-building tactics to a proactive, integrated brand and revenue strategy. Digital PR was seen previously as the link builder, but now it's becoming your primary engine for building E-E-A-T (Experience, Expertise, Authoritativeness, Trustworthiness).

**E** The content should demonstrate that the creator has first-hand, practical, or life experience with the topic.

**E** The content creator should exhibit deep knowledge or skill in the subject matter being presented.

**A** The website and its creators should have a recognized reputation as a reliable and respected source within their industry or field.

**T** The page and website must be accurate, honest, safe, and reliable, which is considered the most critical component.

#### Tier 1

##### Play 37. Deploy your E-E-A-T champions

The flood of generic AI content has made genuine human expertise the ultimate differentiator for any business now. Particularly within the media, journalists are demanding non-AI commentary, with 47% relying on industry experts more than any other source (Cision). Your experts are your brand.

- Align internally: Your PR team should identify and align your internal Subject Matter Experts (SMEs).
- Build a program: Build a structured "SME program" to get their unique insights (their "Experience") into the market via quotes, bylines, and media appearances.
- Make it easy: Interview your SME for 15 minutes and turn that into five quotes for journalists.

Tip: Use a tool like HARO (Help a Reporter Out) or Qwoted. Assign the task to one person to scan these daily for relevant journalist requests. This is the fastest way to get your expert's name and company link in a high-authority publication.

### **Play 38. Regulatory ready**

Laws are getting tougher, and with it so are the financial risks involved in non-compliance. The DMCCA (Digital Markets, Competition and Consumers) Act bans fake reviews and subscription traps. The DUAA (Data Use and Access) Act has increased fines for PECR breaches (which govern all your email marketing) to £17.5 million or 4% of global turnover (DPDI).

- **Audit yesterday:** Conduct a full audit of all your marketing practices. The potential £17.5m fine is not something to be ignored.
- **Review subscriptions:** Review your subscription paths – is the "unsubscribe" button as easy to find as the "subscribe" button?
- **Verify reviews:** Ensure all review collection is compliant (no "review-gating") and verify that your email data collection is watertight.

**Tip:** This is both a legal and PR issue. Loop in your legal counsel now. Getting this right now can then make it an offensive play by promoting your transparent, compliant practices as a badge of trust.

### **Play 39. Use AI as an assistant**

AI has become standard practice (90% of content marketers use it, Content Marketing Institute), but its biggest issue is its lack of humanity. "Average" content is now free to produce, and "good" content is still worthless.

- **Use AI for ideation:** Use AI as your co-pilot for ideation, research, and first drafts. "Give me 10 angles on the DMCCA for manufacturers."
- **Use your humans for insight:** Rely on your human experts (see Play 37) to acquire proprietary data, insights, and to create and maintain a unique brand voice.
- **The 80/20 rule:** AI writes 80% (the summary), your human adds the remaining 20% (the unique insight). That 20% is 100% of the value.

**Tip:** AI is brilliant at summarising what's known, but is incapable of generating and mimicking "Experience." Your entire content strategy must be built around what your team experienced and learned.

## **Tier 2**

### **Play 40. Moving from link volume to link relevance**

Link volume isn't no longer the play. Data leaked from Google confirmed that link relevance is where its really at. A single link from a niche trade journal that your 13-person buying committee actually reads is now more valuable than ten high-authority, but irrelevant, links.

- Change your KPI: Ditch "total links" as a primary KPI.
- Measure business impact: We are now measured on business impact – so think lead quality, pipeline influence, and brand trust – not vanity metrics.
- Focus outreach: Focus your outreach efforts exclusively on the publications that have your ideal customer's attention.

KPI to watch:  
Target Account Reach.  
Did you get mentioned  
by an expert at one of  
your top 50 target  
accounts?

### Play 41. In-house multimedia production

Video is set to exceed 80% of all internet traffic (Cisco) – 87% of B2B marketers are investing in it (Wyzowl), and B2B podcasts are becoming a core trust-building channel. Your team must now think, budget, and act like a multimedia production house.

- Integrate workflows: When you secure a positive quote in an article, pull the soundbite into a branded graphic and post it as a "quote card" on your socials.
- Repurpose: When you release a report, create a 60-second summary video for LinkedIn.
- Budget for it: Allocate a budget for decent microphones and some simple video editing software.

Tip: Turn your report into: A blog post, a press release, a webinar, five short videos, 10 social media quotes, and a podcast episode. Remember, your audience consumes information differently and across different channels, so maximise your output and provide multiple touch points to reach your audience, one way or another.

## Tier 3

### Play 42. Merge PR with RevOps (the C-Suite metric)

Google's AI Overviews are causing your brand influence to separate from your website traffic as clicks decline. You must speak the C-suite's language: Marketing Qualified Leads (MQLs), pipeline contribution, and Customer Acquisition Cost (CAC).

- Integrate with RevOps: Digital PR is now an integral part of the Revenue Operations (RevOps) engine.
- Track influence: Build a measurement model that tracks brand influence (share of voice, unlinked brand mentions, AI answer inclusion).
- Connect to your CRM: Use "How did you hear about us?" (with an open text field) on your demo/enquiry form. When a prospect writes, "I saw your CEO in The Times," you can manually attribute that pipeline to PR in your CRM.

Tip: Look for correlation. Did you get a placement in a trade journal on Monday? Did your "brand search" volume and "direct traffic" spike on Tuesday? That's not a coincidence. That's proof of impact.

### Play 43. Make ESG a measurable differentiator

"Greenwashing" is now a legal and brand liability. With mandatory UK Sustainability Reporting Standards (SRS) on the way and 36% of B2B shoppers willing to switch providers over poor sustainability (McKinsey), this is becoming a critical commercial and trust issue.

- Get the data: Your ESG story must be backed by transparent, measurable data. Work with your operations and finance teams to get the real data.
- Be honest: Be transparent about your goals and your failures. "We reduced emissions by 10%, but missed our packaging goal. Here's how we're fixing it."

Tip: Transparency is your competitive advantage. Your buyers know perfection is impossible. Therefore, they build trust with the brand that is honest about its progress.



## Hear from the experts...



Digital PR has become a valuable lever in B2B as it helps brands build credibility in the places where buyers are actually spending time.

Most B2B decisions don't happen in a straight line. People read, compare, ask around, and build opinions long before they are ready to speak to a sales rep. That research now spans TikTok, Reddit, trade publications, podcasts, newsletters, and Google, often with multiple stakeholders dipping in and out at different moments.

This is where strong DPR makes an impact. It places your expertise into those everyday touchpoints, through useful expert commentary, relevant coverage, and stories that demonstrate real authority. Giving people a reason to trust you before they have even considered booking a call or demo.

Digital PR helps you become the brand they already feel confident when they finally are ready to buy.

**Tom Hemingway**  
**Head of Digital PR**



# Section 7.3

## Organic social: The post-reach playbook

Broadcasting content and counting the numbers is officially obsolete. We've now moved into the post-reach era.

Success here is measured by how deeply you connect with the right people, and not just by how many people you shout at. The goal is to spark conversation and build community.



### Tier 1

#### Play 44. LinkedIn 2.0

LinkedIn's 2025 algorithm updates were a deliberate market correction to filter out engagement bait. The impact: views plummeted by 50%, engagement dropped by 25%, and follower growth fell by 59% (Richard Van Der Blom). That, unfortunately, is now the new normal.

- Unlearn old habits: The algorithm now suppresses outbound links and overly promotional content.
- Prioritise conversations: Your strategy must move to: 1) Prioritising content from first-degree connections, 2) Using native formats (carousels, in-depth text) to maximise "dwell time", and 3) Spark meaningful conversation.

Tip: Comment is king. Responding to a quality comment within the first hour can boost a post's visibility by as much as 35% (Richard Van Der Blom). Your social media manager's job is now 50% creating content and 50% engaging in the comments.

## Tier 2

### Play 45. Scale employee advocacy as a core channel

With algorithms favouring personal profiles over corporate pages (Richard Van Der Blom), employee advocacy is now an indispensable distribution channel. Your audience is rejecting polished corporate messaging.

- Move away from corporate: Stop force-feeding corporate content to your team.
- Create a formal Employee-Generated Content (EGC) program. Identify your experts (see Play 37) and train them to build their personal brands.
- 73% of social managers with a formal advocacy program report that it doubles their brand's social media engagement (Richard Van Der Blom). Share these wins internally.

Tip: Create a private Slack channel called #linkedin-champions (or something less cringey if needed). When someone posts a piece of content, they share it there, and the rest of the group supports it with thoughtful comments (not just "great post!") to help fuel the algorithm.

### Play 46. Content hook and depth

The 2026 social strategy is a paradox. You must be brilliant at two different speeds: short-form video as your "hook" and long-form assets for "depth".

- Short-form (the hook): Use TikTok and Reels to humanise your brand, showcase culture, and simplify complex topics. 78% of people prefer learning via short video (Wyzowl).
- Long-form (the depth): Use webinars, in-depth articles, and video podcasts to satisfy the algorithm's hunger for "dwell time" and establish true authority.

Tip: Use short-form as the "trailer" that drives your audience to the long-form assets where you build trust. Post the 30-second "hook" video, and in the first comment, link to the full-length podcast.

### Play 47. Adopt a platform-specific strategy

You can't approach your socials in a one-size-fits-all approach – if you do it will fail. Instead, allocate resources based on the channel's specific job.

- LinkedIn: This is your Thought Leadership and Lead Gen stage. Stop thinking like a "content creator" and start acting like a "subject-matter expert." Post in-depth text and carousels.
- TikTok / Reels: This is your brand humanisation and employer branding channel. Show your culture and create educational "how-to" videos for the 25-34 age group, especially.

Tip: Assign one channel as your "Primary" (likely LinkedIn) where you post original content. All other channels are "Distribution," where you repurpose and adapt that content.

## Tier 3

### Play 48. Evolve from broadcaster to community builder

Your audience is fragmenting from the public "town square" into "gated communities" (like niche LinkedIn Groups, Slacks, and Discords). 86% of businesses report community management is essential for success.

- Role change: Your job is no longer to be the loudest voice. It's to be the most valuable, authentic participant in the conversations that matter.
- Assign someone: Assign one person to spend 30 minutes a day in the top three "dark social" communities for your industry (see Play 19).
- Help, don't sell: Their job is to help and answer questions, not to post links.

# 86%

of businesses report  
community  
management is  
essential for success

Tip: This is where you find your next case study. When you see someone in a private community praising your product, DM them. Thank them and ask if they'd be willing to take part in a quick interview.



# Section 7.4

## Email/ CRM: Here comes the agent

We've mentioned already, but tools are moving from predictive assistants to autonomous agents. They won't just suggest what to do; they'll now start doing it. This shift is built on a non-negotiable foundation of data integrity. Your CRM is not just a database; it's the brain of your entire GTM motion.

### Tier 1

#### Play 49. Email compliance

When Microsoft adopted the same strict SPF, DKIM, and DMARC authentication rules as Gmail and Yahoo, compliance became an issue not just for marketers, but also for the C-suite [1]. Your IT team's DNS settings can now single-handedly kill your campaign ROI.

- Audit your setup: Mandate a full audit of your email authentication setup (SPF, DKIM, DMARC) with help from your IT team. This is as simple as pass/fail. Well, if it is a fail, then perhaps not so simple (fingers crossed!).
- Audit data practices: Audit your data practices against the ICO's 2025 online tracking strategy.
- Prioritise first-party data: A consented, first-party data strategy is your single most important priority.

Tip: Use a free tool like [mxtoolbox.com](https://mxtoolbox.com) to check your domain's DMARC record. If it's not set to `p=reject` or `p=quarantine`, your domain is at risk and your deliverability is suffering.

#### Play 50. Re-focus on real engagement

We have to stop obsessing over open rates (which Apple's MPP made unreliable) and focus on what matters. Email is still the top B2B revenue channel (59% of marketers), delivering a £35 ROI for every £1 spent (DMA UK).

- Change your KPI: Measure Unique Click Rate (which climbed to 2.3% in the UK, Sopro).
- Embed video: Increase this by embedding value, especially video. 95% of B2B buyers say video is crucial to their purchase decisions (Brightcove).
- A/B test: A/B test a static image vs. a video-GIF in your next email. Just one of many example tests you can run.

Tip: Your email signature is your most-viewed, lowest-cost ad space. Get the entire GTM team to have a signature (using a tool like Exclaimer) that links to your latest case study or webinar.

## Play 51. Mobilise your CRM

The CRM is the central nervous system for your entire GTM team, including (and especially) small businesses. But it's useless if your sales team can't access it in the field.

- Get the app: 65% of sales teams using a mobile CRM achieved their sales targets, compared to just 22% of those who didn't (CRM.org). If your team gets out and about, ensure your CRM has a functional mobile app and put it to good use.
- Train on it: Show them how to add notes via voice-to-text after a meeting - you'll become their best friend.

Tip: The goal is to create a "zero-friction" data entry. The easier you make it for sales to log a call, the cleaner your data will be, and the better your marketing (and AI) will perform.

## Tier 2

### Play 52. Build a stable martech stack

The all-in-one CRM is facing a major challenge. The new trend is the "composable stack" - a flexible "Lego brick"-like approach. Use your core CRM as your data hub, then integrate tools for quoting, analytics, or marketing automation via APIs.

- Identify gaps: Look for the biggest functional gap in your all-in-one stack (e.g., "Our quoting tool is terrible").
- Find a "brick": Start the conversation about replacing just that one "brick" with a tool that integrates via API.
- Prioritise integration: This makes you far more agile. The number one criterion for any new tool is the quality of its API.

Tip: Your CRM (e.g., Salesforce, HubSpot) is your "data hub." Your other tools (e.g., 6sense for intent, Gong for calls, Allego for sales rooms) could be seen as your "spokes." The ideal scenario you are looking to create is one where the data flows seamlessly between them.

Tip: "Composable" doesn't have to mean "expensive." Before you invest in a new tool, check if Zapier or Make.com can solve the problem for a fraction of the cost. A well-built Zap that connects your existing tools (e.g., "When a Typeform is submitted, create a specific deal in HubSpot and alert the right rep in Slack") might be all you really need, rather than another log in to another platform to provide the same result and just confuse your team more.



## Tier 3

### Play 53. Pilot your first "Agentic AI" workflow

Here your CRM becomes an active participant, executing complex tasks for you. Early adopters are already cutting operational overhead by up to 40% this way (McKinsey).

- Pilot one simple, autonomous workflow.
- Example workflow: Create a workflow where the AI receives an inbound lead, qualifies it against your CRM data, checks your sales rep's calendar, and schedules the discovery call – all without human approval.

Tip: The first place to build is lead routing. Use AI to instantly analyse a new lead (company size, industry, job title) and route it to the correct "pod" (see Play 10), saving valuable minutes that could be the difference between winning and losing.

As AI agents (see Play 53) and autonomous campaigns (which generate 1:1 dynamic content) take over the execution, your team's role must evolve too.

- Upskill your team from "doers" to "orchestrators."
- Their new job is to design the complex customer journeys and set the rules.
- Set frameworks: They must set the logical, ethical, and brand frameworks for the AI agents to operate within.

Tip: Your most valuable team member is the one who can think strategically and write the clearest, most logical brief (or prompt) for the AI to execute. Be sure to monitor your AI counterpart, though – feedback and training of the AI is important to ensure it remains focused and accurate on the task it's set to do.

## Section 7.5

### Analytics: From attribution to triangulation

Privacy rules, along with the rise of "Zero-Click" search behaviour (see Section 7.1) and the fading use of cookies, have turned perfect attribution into something we just cannot achieve anymore. Things will look different by 2026.

As we shift our organic strategy from "driving traffic" to "gaining visibility," our measurement must shift too. Success doesn't come from excelling at SEO or PPC alone. It comes from really understanding how those two work together to dominate the "Share of SERP." Your analytics setup stands as the main proof of that understanding. Still, you need to shift your thinking from simple attribution to something like "triangulation"—measuring your total market impact, not just the clicks that make it to your site.



#### Tier 1

##### Play 55. Stop the data leaks right now

If your setup still relies on old client-side tagging methods, you'll end up missing about 30 - 40% (Sopro) of conversion details because of ad blockers and those new browser privacy options. That kind of loss adds up fast.

- Go Server Side: Put this at the top of your tech list. Switch to server-side tagging through something like Google Tag Manager Server-Side.
- How it works: Tracking shifts away from the user's browser, where blocks happen easily. It moves to your own secure server instead. There, you hold all the control.
- The benefit: You reclaim that lost data. Conversion tracking gets up to 28% more accurate as a result (Stape).

Tip: Keep in mind, this takes some real technical work. Get your web developer and IT folks on board to help out.

## Play 56. Get good with GA4

Stop focusing on sessions the way you used to. GA4 works with a user and event model that fits the drawn-out B2B process pretty well. It tracks a full path now. Think of someone reading a blog post, then downloading a whitepaper after a week, and finally asking for a demo. All that ties into one solid narrative.

- Turn on the B2B tools fully: Start with automatic Form Interaction tracking – set Data-Driven Attribution (DDA) as your default.
- Build predictive audiences: Create your first Predictive Audiences. Ones like users who might convert within seven days. Then send that data over to Google Ads for better retargeting.

Tip: Aim to link your CRM data right into GA4. Bring in offline events such as Qualified Lead and Closed-Won Deal. That way GA4's AI focuses on real revenue drivers. Not just basic form submissions.



## Tier 2

### Play 57. Switch to a “triangulation of truth” approach.

The exact user-level multi-touch attribution we once had is history now. For 2026, you build around triangulating facts from different matching tools. Set up a dashboard with layers. One that combines three key models.

- Start with first-party analytics: Lean on GA4's Data-Driven Attribution for breaking down on-site journeys.
- Add "Off-Site" Visibility Metrics: Since SEO is now about "Total Visibility" (Section 7.1), you must track "Share of Search" and "Unlinked Brand Mentions" to measure the impact occurring off your website (e.g., on Reddit or in AI answers).
- Add in Marketing Mix Modelling (MMM): That gives top-down stats to guide big budget choices. Your CFO will appreciate that kind of overview.
- Then use lift studies and tests: They act as the decider to show real cause and effect. For instance, did the LinkedIn campaign really boost demo requests?



### Play 58. Move your KPIs from MQLs to Revenue (via RevOps)

The classic top-of-funnel setup no longer holds up. With the current economy, retention beats out acquisition in efficiency. Full-lifecycle marketing becomes essential here. You can't pull that off without Revenue Operations in place.

- Break silos: Team up with Sales Ops and Finance. Break apart those data walls between the groups.
- Change KPIs: Focus on Customer Lifetime Value (CLV) and Net Revenue Retention (NRR).

Tip: Track Pipeline Velocity from the start. Measure the days it takes a lead to go from MQL to Closed-Won. Marketing's job is to accelerate this.

## Tier 3

### Play 59. Put together a zero-party data plan

This tackles the personalisation issue head-on. We face pressure to create one-on-one experiences. Yet privacy limits available data. Zero-party data steps in as the fix. That means info customers share on purpose, and willingly.

- Turn your content into the data tool: Set up a clear trade where they give info for value.
- Develop something useful: An ROI calculator works. Or a quiz to find their Marketing Maturity Score.
- Say in a quiz, they note “My biggest challenge is X”. That beats any third-party cookie data. Plus, it stays fully compliant.

Tip: Send that zero-party data right to a personalisation spot in your CRM. Use it to customise the nurture sequence. For example, you mentioned “X” as your top issue. Here are three articles to help fix it.

### Play 60. Step into the role of AI trainer and ethicist

The marketing tools keep getting more independent. AI is already starting to handle budget shifts across channels in real time. As it takes over like autopilot, we need to turn into the trainers and the ones setting ethical limits.

- Supply the system with solid, clean data: Rubbish input leads to rubbish output. Check back to Play 1.
- Define the key limits: Ones that keep things brand-safe and ethical for the AI to follow.

Tip: Your role includes checking the AI work. You ask why it pushed more budget to “Channel X”. If the explanation does not make sense to you, then the tool needs more work before it's ready.

## Hear from the experts...



Irrespective of platform, your data is currently limited, and will be as long as privacy laws, browser protections, cookie depreciation, ad-blockers, and a lack of investment in server-side tracking and MMM solutions are prevalent in the industry. Businesses have long relied on free analytics to measure performance and lack the awareness of the value of the data they can collect and use to make critical decisions on campaign direction to drive impactful performance.

Investing in your data setup is just as important, if not more so, than investing in the marketing channels themselves. Failure to do so is costing you performance and, therefore, money. Without a full understanding of cross-platform/device performance, you are lacking the critical information needed to help push the limits of your campaigns to get the best returns.

Start with server-side analytics to ensure you're gathering as much data as possible under UK-GDPR rules, and then map out your plan to better understand attribution using an MMM tool.

**Sam Thomas**  
Insights Director



# Section 7.6

## PPC: From pilot to revenue strategist

In the past year, PPC has "re-platformed." No longer about tactical, channel-siloed management, but instead intent-driven, revenue-centric strategy. Why? Because the emergence of the 13-stakeholder buying group is far too complex for the old tactics.

Your new role here is "AI Trainer" and "Revenue Strategist." Your value comes from feeding the AI high-quality revenue data and building a de-risked, diversified portfolio.

### Tier 1

#### Play 61. AI as your operational default

96% of UK marketing leaders agree all marketers need AI skills (The Chartered Institute of Marketing). In PPC, this means campaign types like Performance Max and strategies like Smart Bidding have become the new default, not a "test".

- Train the AI: Your job is to train the AI, not out-think it. This means feeding it the best possible data (see Play 62).
- Tip: You train the AI with two things: 1) Data (see Play 62) and 2) Creative. PMax requires a constant stream of new video, image, and text assets. Your new job is "Creative Strategist."

#### Play 62. Fuel AI with first-party revenue data

AI is built to find conversions, but a "whitepaper download" is a low-quality signal, whereas a "qualified opportunity with a £100k value" from your CRM is a high-quality, revenue-based signal.

- Build the infrastructure: Build the technical systems to feed this rich, first-party revenue data from your CRM back into the ad platforms (e.g., via Enhanced Conversions for Leads).
- Assign values: Assign a £ value to each conversion (e.g., "Demo Request" = £100, "Closed-Won Deal" = £10,000).
- Show what good looks like: This teaches the AI what an ideal or valuable customer looks like – making your spend much more efficient.

Tip: Remember, your competitors can copy your ads, but they can't copy your first-party revenue data.

## Tier 2

### Play 63. Re-platform for the "AI Overview" revolution

The full UK rollout of Google's AI Overviews is the most disruptive change to search in a decade. This AI answer box sits above your ads and the data is stark: in 27% of searches that trigger an AI Overview, no ads are shown at all (BrightEdge).

- Immediately divest from broad, top-of-funnel informational keywords (e.g., "what is CRM"). They are now a dead-end. Take the budget saved here and re-allocate it to fund the "Proprietary Research" and content creation required for your SEO E-E-A-T strategy (see Play 34).
- Move your budget to hyper-specific, long-tail keywords that signal immediate commercial intent (e.g., "Salesforce alternative for manufacturing").

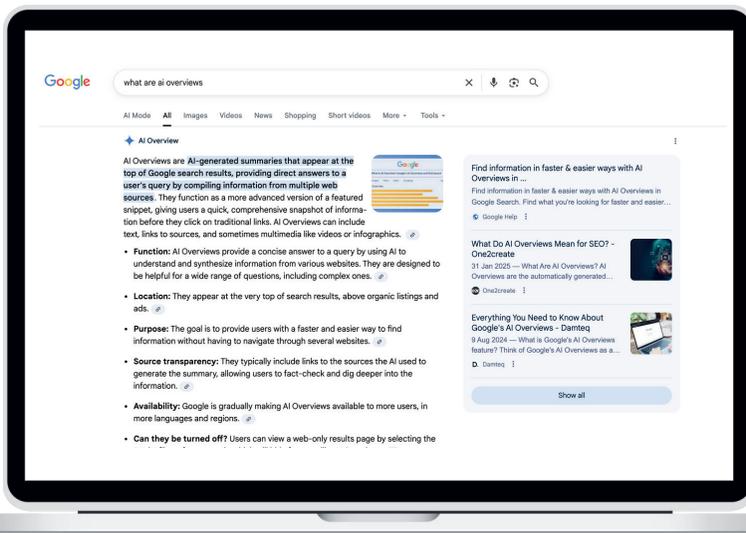
### Play 64. Diversify to de-risk Google

A "Google-only" mindset is now a high-risk strategy. Between the AI Overview disruption and the UK's Competition and Markets Authority (CMA) designating Google with "strategic market status", the platform is too volatile.

Look to diversify:

- LinkedIn Ads: It's the only major platform to consistently show a positive B2B ROAS (113%) (Wpromote) and is used by 82% of B2B marketers (Content Marketing Institute).
- Microsoft Ads: This is the savvy choice. It offers lower CPCs and, crucially, leverages its integration with LinkedIn profile data for superior B2B targeting.

KPI to watch: CTR is a dead metric. ROAS (Return on Ad Spend) and Pipeline-to-Spend are now everything.



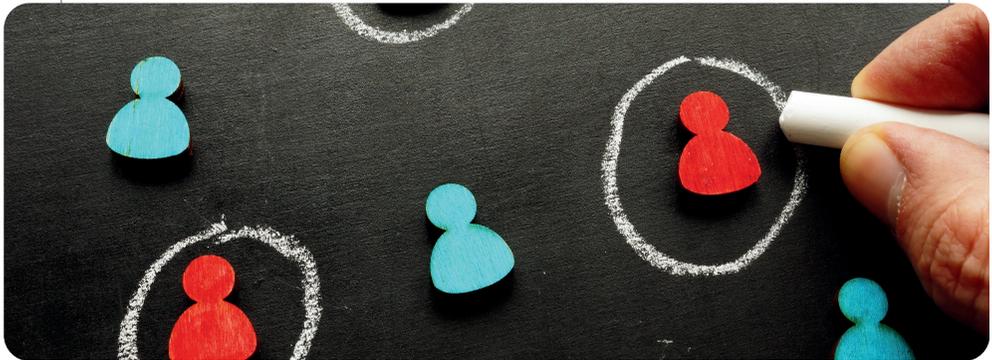
## Tier 3

### Play 65. Become an audience architect, not a keyword researcher

AI is smart enough to understand intent far beyond a keyword list. The advanced role here is to shift from curating keywords to defining and building high-value audience segments based on intent, behaviour, and firmographic data.

- Use your first-party data (from your CRM) and predictive intent data (from tools like Bombora, see Play 7) to build your audiences (e.g., "Enterprise accounts in-market for our solution").
- Feed these audiences to PMax and let the AI find the keywords and intent signals.

Tip: This is where you find your next case study. When you see someone in a private community praising your product, DM them. Thank them and ask if they'd be willing to take part in a quick interview.



### Play 66. Merge PPC with RevOps

PPC can no longer be measured by MQLs. The entire practice must be integrated with RevOps (see Section 3).

- Change your title: Your new job is "Revenue Strategist."
- Connect spend to pipeline: You must be able to connect ad spend directly to pipeline velocity (CLV) and closed-won revenue in the CRM.
- Change your KPIs: If you can't measure it, you can't manage it. Your KPIs are pipeline-to-spend and CLV, not CPL.

Tip: Create a dashboard that shows "PPC Spend vs. Closed-Won Revenue" on a 90-day lag. This accounts for your sales cycle and is the only chart your CFO will care about.

## Hear from the experts...



Overall, it's time to step away from keyword bidding in order to start building an intelligent infrastructure – pipelines of first-party data, high-quality creative, and integrated RevOps alignment. Every ad, audience, asset, and element of automation must serve the larger commercial narrative.

AI has essentially automated the execution layer of PPC; however, what remains incredibly important is human judgment – knowing which data segment matters, which audience to prioritise, and how to translate data analysis into real, end-to-end growth.

Train the AI, connect the dots throughout the buyer funnel, and create a marketing channel where data doesn't just inform decisions, but drives the entire go-to-market strategy. This is the key to success within the modern PPC landscape.

Lastly, you must carefully manage your offline conversion tracking and have a well-rounded attribution setup in place. With PPC's impact being as non-linear as ever, trusting your tracking has never been as important as it is now.

**George Noon**  
Head of PPC



## Section 7.7

### Paid Social: From leads to buying groups

We're facing a perfect storm of AI acceleration, privacy clampdowns, and intense C-suite pressure to prove revenue contribution.

The UK social ad market is a £9 billion juggernaut (Statista); and this is no place for "test" budgets.

Your goal is to move from "chasing the lead" to "saturating the buying group" and to master the new "social search" landscape.

**£9  
billion**

The size of the UK social ad market

#### Tier 1

##### **Play 67. Embrace your AI co-pilot (Advantage+)**

AI has become your new creative partner and strategic analyst. On Meta, this means trusting the "black box" of Advantage+ campaigns.

- **Feed the machine:** Your job is no longer to manually tweak bids and audiences. It's to feed the machine. Give your Advantage+ campaign your best first-party data (CRM lists, high-value customer lists) and let the AI find your audience.
- **Refresh creative weekly:** You must refresh creative weekly, not quarterly, to feed the AI's appetite.

Tip: The 80/20 rule for Advantage+: Spend 80% of your time on creative and offer strategy, and 20% on "in-platform" tinkering.

##### **Play 68. Fix your measurement (CAPI and server-side)**

Without accurate, server-side data, your AI-powered campaigns (see Play 67) you're moving in the dark.

- **Prioritise CAPI:** The LinkedIn Conversions API (CAPI) and Meta's CAPI are the baseline for accurate measurement and optimisation.
- **Implement server-side:** This is a rather technical implementation (see Play 55), so prioritise this task with your dev team.

Tip: When you set up your server-side GTM container, configure it so that it sends data to Google and Meta/LinkedIn.

## Tier 2

### Play 69. Target the "buying group," not the "lead"

The B2B decision is made by a committee, therefore continuing to chase just one contact with a lead form is a losing game. The new strategy is account-wide saturation.

Co-ordinated campaigns:

- LinkedIn for C-Suite: Run high-level brand and thought leadership ads to the C-suite on LinkedIn.
- Meta for users: At the same time, run product-focused, demo-driven retargeting ads to the end-users and managers on that same account list using Meta's (CPLs as low as £4.60) (WordStream).

Tip: Upload your target account list to LinkedIn. Then, retarget the website visitors from that campaign on Meta. This is a high-intent, low-cost way to reach the whole committee.

### Play 70. Master "social search"

Younger audiences (Gen Z and Millennials) are now using TikTok and Instagram as their primary search engines; before they use Google. This changes everything about how you create content.

- Treat social as SEO: Treat your social content as your new SEO.
- Optimise everything: Your captions, on-screen text, and even the spoken words in your video's audio must be created to be the answer to a buyer's question.
- Be the answer: A user searching "best crm for sales teams" on TikTok should find your 60-second educational video.

Tip: Your "social search" content should be 100% educational, not promotional. Use a "How to..." or "Three common mistakes..." framework.

### Play 71. Be human on TikTok

Don't sell on TikTok. Humanise. This is where you build your employer brand and connect with the next generation of buyers (and the current one - 40% of UK users are over 35) (Statista).

- Use EGC: Employee-Generated Content (EGC) is your number one asset here. Show the real people and culture behind your logo.
- Educate and entertain: Solve the tiny, specific problems for your audience.
- Be the expert: Support your audience personally (the helpful expert). Don't be the corporate robot.

Tip: The "Day in the Life of a [Your Job Title]" format is a long-standing, proven winner. It allows your audience to take a peak inside, humanises your brand and serves a powerful employer branding tool.

## Tier 3

### Play 72. Build a B2B creator economy strategy

This isn't about one-off posts with big-name "influencers." This is about building long-term, paid partnerships with niche, credible industry experts. Their built-in trust becomes your trust.

- Pull together a list of 5-10 experts that your buyers trust.
- Start the conversation and offer a 6-month paid partnership (e.g., "co-host a webinar series with us").
- Use LinkedIn's Thought Leader Ads to promote content from their profiles, which can get up to 2.3x higher CTR than your company page ads (LinkedIn).

Tip: Pay them to create content, not just post your content. Ask them for their honest take on an industry trend. Their authenticity is what you're paying for.



### Play 73. Connect every pound to the pipeline

The days of justifying spend with impressions or even raw MQLs are now a thing of the past. Your C-suite wants Revenue ROI.

- This is the full RevOps integration (see Section 3).
- Connect your LinkedIn CAPI data directly to your CRM.
- Your new KPI is pipeline velocity. Are deals that were influenced by your Meta and LinkedIn campaigns closing faster than deals that weren't?

Tip: Use your CRM to create two groups: "Deals Touched by Paid Social" vs. "Deals Not Touched." Compare the average contract value (ACV) and sales cycle length. This is your C-suite-ready proof of ROI.

## Hear from the experts...



When it comes to social media marketing, it's becoming increasingly clear that AI and authenticity must co-exist to drive success. The current winners are using human insight to shape the input, and AI to scale the output – particularly when it comes to creative testing and optimisation.

My top recommendations are to test new creatives frequently, focus on engagement quality over volume, and use data intelligently to guide decision-making.

The right balance of human storytelling, data-based decision making and machine learning is what separates high-performing brands from those still struggling to break through the noise.

**Harriet Tuite**  
**Head of Paid Social**



# Section 7.8

## Affiliate marketing: A performance powerhouse

Think affiliates is just a final-click voucher code channel? Well, you're two years behind. In 2026, it's really matured and is becoming a central pillar of the marketing mix, showing 9% YoY growth in the UK (IAB UK & PwC). Why? Because with an average ROI of 12:1 (Performance Marketing Association), it's a proven performance channel.

9%

growth of affiliate marketing YoY in the UK

You must evolve your affiliate program from a B2C "cashback" model to a B2B "trusted referral" engine, built on compliance and data.

### Tier 1

#### Play 74. Conduct a DMCC compliance audit (now)

With fines of up to 10% of global turnover, the DMCC Act has real teeth. It targets the grey areas this channel has lived in for years: an outright ban on fake reviews, stricter rules on drip pricing, and a mandate for clear ad disclosures.

- Review partners: Review all your key partners' content.
- Scrutinise claims: Scrutinise their urgency claims ("offer ends soon!"), ensure their ad disclosures are unmissable, and verify they have a clear process for removing fake user reviews.
- Share liability: This liability is now yours. You must provide partners with a "Compliance one-pager."

Tip: Add a "compliance" clause to your affiliate T&Cs. For any partner found to be non-compliant (e.g., using fake reviews) then they will be removed from the program and therefore their commissions forfeited.

#### Play 75. Fix your data (Server-to-server and first party)

You must own your audience relationship. Furthermore, you need to fix the data gaps created by browser privacy.

- Build your own audience via newsletters and some gated content.
- Move to server-to-server tracking to ensure every conversion is recorded accurately. This is the same principle as CAPI (Play 68).
- Ensure proper channel tracking parameters are set. While this isn't going to impact external tracking with partners, it can benefit wider reporting when aligning the conversion journey against other channels in GA.
- Invest in AI-powered fraud detection (often built into platforms like Impact or PartnerStack) to protect your spend.

Tip: Server-side tracking, which validates the conversion before firing the pixel, is your best defence.

## Tier 2

### Play 76. Adopt a B2B-specific Affiliate model

You cannot copy-paste the B2C strategy. B2C's goal is immediate sales (ROAS). Your goal is to generate high-quality, qualified leads for a long sales cycle.

- Shift from cashback sites to niche industry experts, respected thought leaders, and professional associations.
- Change from "product reviews" to co-created white papers, research reports, and expert-led webinars.
- Measure Cost Per Lead (CPL), Lead Conversion Rate, and Pipeline Value. Other KPI's to track: Cost Per Acquisition (CPA), Revenue, Click Rate, and Spend.

Tip: Use a hybrid commission structure. Offer a fixed fee (e.g., £100) for a "Qualified Demo" and a percentage (e.g., 10%) of the "Closed-Won Deal." This motivates partners to send you high-quality, not high-volume, leads.



### Play 77. Diversify your partner mix

The game has moved from static blogs to dynamic "shoppertainment" on TikTok, Reels, and YouTube Shorts. 74% of consumers trust an influencer over a brand (BBB National Programs). So, you must diversify beyond traditional blogs.

- Actively recruit a full-funnel mix. This includes top-funnel partners like niche content creators (for B2B, this means industry experts on LinkedIn), professional podcasters, and relevant B2B communities. It also includes lower-funnel transactional partners like CLO (card-linked offers) and Closed User Group opportunities through business bank suppliers (Mastercard B2B, CapitalOnTap, Tide).
- Crucially, move them to a performance-based payout (CPL/CPA) instead of a flat "influencer" fee.

Tip: Your best "affiliates" are often your own happy customers. Through an affiliate partnership, you're not only retaining customers who value your brand but also giving them the ability to earn back when they share your brand with their like-minded audience. This builds long-standing relationships that can continue to benefit both parties.

## Tier 3

### Play 78. Evolve your partners to survive GEO

Google's AI Overviews (GEO) are cannibalising clicks from the traditional "review" and "comparison" blogs that many affiliate programs rely on.

- Coach your partners: Your partners must evolve from "ranking for keywords" to "building an audience".
- Focus on value: Coach them to create value that an AI cannot summarise: interactive tools, calculators, community forums, or exclusive, data-driven insights.
- Be the co-branded source: They must become the authoritative source the AI cites (see Play 36). However, ensure this content is explicitly co-branded (e.g., "Research by [Partner] and [Your Brand]"). This ensures that when the AI cites them as the source, your brand name is included in the answer.
- Protect attribution: Highlight that branded/personal open codes can be captured by AI Overviews, leading to missed opportunities if code attribution isn't set. Reserve these codes for valued users (like newsletter sign-ups) instead of displaying them publicly.

Tip: The "comparison" blogs that will survive are those that add true "Experience" (E-E-A-T). "We personally tested all 5 tools. Here are our real-world findings." This is what AI can't replicate.

### Play 79. AI-powered attribution

Reward the partners who introduce the lead, not just the one who closed it.

- Upgrade your tech: Invest in your tech stack to move to an AI-powered, multi-touch attribution model (many affiliate platforms now offer this).
- Reward the funnel: This allows you to reward top-of-funnel partners (like podcasters or thought leaders) and content partners fairly.
- Motivate Tofu: This ensures they remain motivated to send you high-quality, early-stage leads, not just bottom-of-funnel "discount clickers."

Tip: Implement a "bonus" system. The partner who sources the lead that becomes your "Highest ACV Deal of the Quarter" gets a £1,000 bonus. This aligns everyone on quality, not just quantity.

## Hear from the experts...



Affiliate marketing has moved far beyond its reputation as a discount-driven, lower-funnel channel; now, these programmes are tailored to be a full-funnel, scalable solution that reaches and influences customers at every stage of their journey. For B2B brands, reaching the right audience, people who genuinely benefit from your product or service, is essential and while AI continues to influence how customers search and shop, the human element of affiliate marketing remains irreplaceable.

Building strong, long term relationships with partners who truly understand their space is what drives meaningful performance. Whether it's specialist publishers creating informed, first-hand content or Google Shopping partners supporting visibility and complementing PPC activity, these touchpoints rely on human expertise to build trust and influence decision-making.

**Jess Gears**  
**Senior Affiliate Executive**



# Section 7.9:

## The B2B DTC & E-commerce Playbook

This section is for B2B businesses where the primary goal is a direct online transaction, not a sales-led demo (B2B suppliers, components, or software sold via direct checkout). The goal blends B2C e-commerce tactics with B2B-specific needs (like account-level pricing and POs).



### Tier 1

#### Play 80. Streamline your checkout

Your B2B buyer expects a B2C-level experience, but with B2B functionality. Friction is your number one enemy.

- Audit your flow: How many clicks from "Add to Cart" to "Purchase Confirmed"? It should be 5 or less.
- Offer B2B payments: A "Credit Card only" flow is a deal-breaker. You must offer "Pay by Invoice" / "Purchase Order" functionality at checkout.
- Enable quick re-order: Your best customer is a repeat customer. Add a "Re-order This Cart" or "Buy Again" button in their account dashboard.

Tip: Implement "account-level" dashboards where a primary user can manage company-wide shipping addresses and payment methods, and invite/remove other buyers from their team.

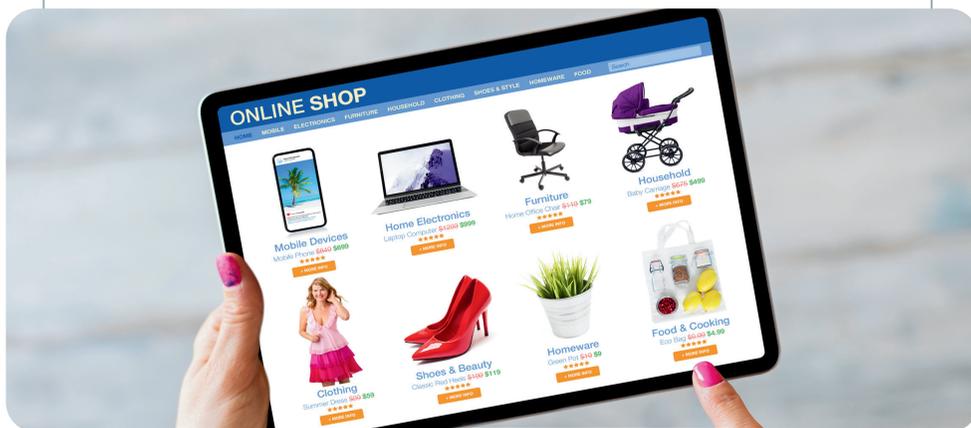
## Tier 2

### Play 81. Master B2B e-commerce SEO

This is different from lead-gen SEO as you are competing on product numbers, categories, and technical specifications.

- Optimise category pages: Your category pages are your most important landing pages. Treat them as content hubs with filters, buying guides, and clear product grids.
- Win the product page: Your product page must have: high-res images/video, detailed technical specs, downloadable datasheets, stock/availability, and clear pricing (or a "log in for pricing" prompt).
- Use schema: Implement "Product" and "Offer" schema to show price and availability directly in the search results.

Tip: Don't forget "faceted navigation" (filters); allowing a user to filter by "size," "material," or "compatibility" is a critical part of the user experience and is an SEO goldmine.



### Play 82. Drive extra revenue with automation

Your CRM/email platform (e.g., Klaviyo, HubSpot) is your revenue engine.

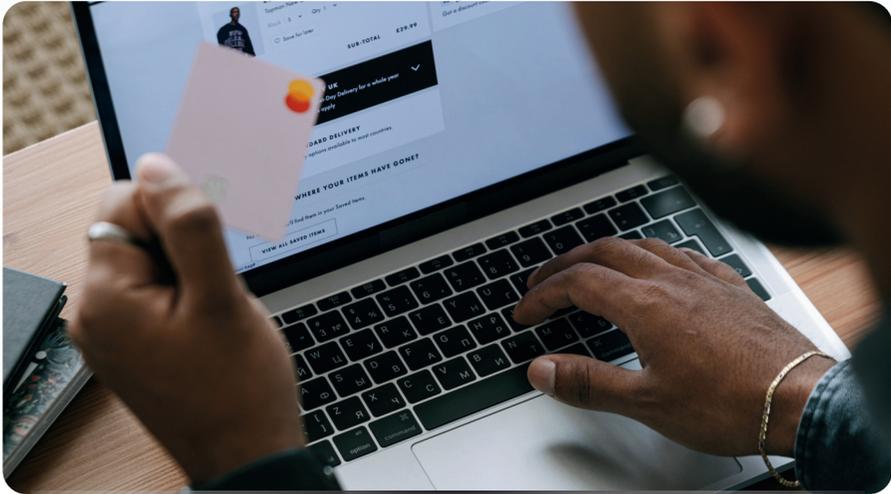
- Cart abandonment: Implement a B2B-specific 3-step cart abandonment flow. The triggers might be different (e.g., waiting for PO approval).
- Subscribe & Save: For consumables, a "Subscribe & Save" model is your single best lifetime value (LTV) driver.
- Cross-sell & Upsell: Use "Customers who bought this also bought..." on the product page and in post-purchase emails.

Tip: Use your automation to send "Low Stock" or "Back in Stock" reminders for items a user has previously purchased. This is a pure service that drives significant revenue.

# Section 7.10:

## The Product-Led Growth (PLG) Playbook

This section is for businesses (primarily SaaS) where the product itself is the main driver of acquisition, conversion, and expansion. The marketing goal is not to "get a demo" but to "drive a sign-up" and "encourage product adoption."



### Tier 1

#### Play 83. Define your Product-Qualified Lead (PQL)

A PQL is a user who has used your free product in a way that signals they are ready to buy.

- What is it? Work with Product and Sales to define this. It's not just "logged in." It's "Invited 3+ teammates" or "Used Feature five times" or "Hit 90% of a data limit."
- What to do with it? This is your most valuable lead.
  - Automate: Trigger an in-app message or email nurture offering a trial or discount.
  - Sales-assist: For high-value accounts, alert a sales rep to "assist" the user, not "sell" to them.

Tip: Your PQL definition is not static. Re-visit it quarterly. As your product evolves, so will the "buying signals" your users display.

## Tier 2

### Play 84. Master in-app and onboarding nurtures

In PLG, your email and in-app messaging (using tools like Intercom or Userflow) are your sales team.

- The "Aha!" moment: Your entire onboarding flow must be focused on getting the new user to their "Aha!" moment (the point where they see the product's value) as fast as possible.
- Trigger-based: Don't send "Day 5" emails. Send "User has not invited a teammate" emails. Send "User just tried Feature X, here's the next step" in-app guides.
- Celebrate wins: When a user completes a key action, use a pop-up to congratulate them and suggest the next logical step.

Tip: Use onboarding to introduce your paid features. Show a "Pro" feature as "locked" and use a simple tooltip to explain the value and link to the upgrade page.

## Tier 3

### Play 85. Build for community-led growth

In PLG, community (e.g., Slack, Discord, or a forum) is a core part of your product, support, and retention strategy.

- Support and scaling: A community allows users to answer each other's questions, which scales your support function for free.
- Product feedback: Your community is the world's best focus group. Product Managers should be living in it to find bugs, feature requests, and new use cases.
- Identifying champions: Your most active community members are your future case studies, beta testers, and advocates.

Tip: Create a "space" (e.g., a specific Slack channel) where your community members can "showcase" what they've built or achieved with your product. This creates a powerful loop of social proof and inspiration for new users.

# Section 7.11

## The B2B channel and partner marketing playbook

This section is for B2B businesses that sell through a network of third-party partners, such as distributors, Value-Added Resellers (VARs), or implementation partners. Your success is tied to your partners' success, so your job is to make them marketing heroes.



### Tier 1

#### Play 86. Fix your partner portal (Your "Partner CRM")

Your Partner Portal (or Partner Relationship Management platform, PRM) is your single source of truth. If it's a "document dump" no one visits, you have a problem.

- Audit the experience: Log in as a partner. Is it easy to find what you need in 30 seconds?
- Must-haves:
  - Lead Registration: A simple form for partners to register a deal (and protect their commission).
  - Core sales assets: One-pagers, slide decks, and battlecards.
  - Core marketing assets: Co-brandable logos, email templates, and social media posts.

Tip: Your number one KPI for your portal is "Partner Log-in Rate." If they aren't logging in, your program is failing. Drive traffic to it with a simple "Partner Newsletter" that links back to new assets in the portal.

## Tier 2

### Play 87. Through-channel marketing automation (TCMA)

Most partners are great at sales but have no marketing team. A TCMA platform (like Impartner, Zift, or features in your PRM) let you run campaigns on their behalf.

- Co-brandable campaigns: You build a three-step email nurture. Your partner logs in, adds their logo, and "subscribes" their customer list. The campaign runs automatically from their brand, but you did all the work.
- Enable, don't just provide: Don't just give them a PDF. Give them a "Campaign-in-a-Box" that includes the landing page, the emails, the social posts, and the one-hour training webinar.

Tip: Start by funding 50% of a paid media campaign for your top five partners. Use your TCMA to send traffic to a co-branded landing page.

## Tier 3

### Play 88. Partner-led content engines

Stop making content about your partners. Start making content with your partners. This gives them the "E-E-A-T" (Play 34) and human expertise that you can't have.

- Co-hosted webinars: Host a webinar with your partner's top engineer. They bring the "behind the scenes" experience and credibility; you bring the marketing engine and promotion.
- Partner-driven case studies: A case study featuring you is a sales tool, but a case study featuring you *and* your partner solving a problem for a joint customer is a revenue-generating machine.

Tip: Create a "Partner Spotlight" series (podcast, video, or blog). Interview your partners' most successful reps. This builds deep relationships, creates authentic content, and trains your other partners by showing what "good" looks like.

# Four key takeaways

This guide has covered a lot of ground, and we don't expect you to absorb it all at once – that's why it's a guide. Flick back at any time to refresh your memory or when you're ready to take on your next play.

However, if we were to really boil down the key themes from this document, remember these four pillars. These are the new foundations for B2B marketing:

# 1

## The revenue mandate is here

The shift from marketing as a cost centre to the revenue engine is complete. All marketing activity, investment, and teams must be demonstrably linked to pipeline, revenue, and retention. Revenue Operations (RevOps) is the non-negotiable operating system to make this happen.

# 2

## Build a "human + machine (AI)" engine

AI is the operational default for productivity, analysis, and execution. Your job is to train the AI. Your competitive advantage is your humanity—your expertise, creativity, empathy, and ability to build authentic (E-E-A-T) trust that AI cannot replicate.

# 3

## Trust is your GTM strategy

Educate, don't sell. Today's B2B buyer is overwhelmed and avoids sales reps. Your new mandate is "buyer enablement." Win by becoming a trusted sense-maker and the authoritative "cited source" for AI (Section 7.1). Whether that's through expert content (Lead Gen), a seamless checkout (DTC), a valuable free product (PLG), or by enabling your partners to co-author your message (Channel).

# 4

## First-party data is your most valuable asset

With third-party cookies gone, the data you own (website interactions, CRM data, in-product behaviours) is the only reliable fuel for your entire GTM engine. It powers your AI, your personalisation, and your high-performance campaigns. Your data strategy is your marketing strategy.

# From insight to action

## Your first 90-day plan

### First 30 days

Data (**Play 1**): Conduct your data quality audit. You cannot build an AI or RevOps strategy on a broken foundation. This is your number one non-negotiable.

Measurement (**Play 55**): Meet with your dev team to scope the server-side tagging project. You are operating blindly without this.

Leadership (**Section 3**): Schedule the first "RevOps Alignment" meeting with your CRO and CFO. Use the notes on "Ownership" and "Incentives" as your agenda.

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Fund your experiment (**Section 6**): Run the "Divest" audit. Identify one legacy campaign or tool to cut.

### 30-60 days

Launch your "Revenue Pod" (**Play 10**): Hand-pick your champions from Marketing, Sales, and CS and launch your first pilot pod with one shared number.

Launch your "Demand Creation" pilot (**Play 12**): Use your "Divest" budget to fund one, 90-day "Educate, don't sell" content experiment (e.g., an un-gated video series). Frame it as using the "Pilot Proposal" framework (**Play 11**).

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Fix your "zero-click" problem (**Play 32 & 36**): Your 90-day goal is to have a roadmap for E-E-A-T and GEO. You have to do this.

### 60-90 days

Calibrate your reporting (**Play 57**): As you pivot to GEO, your traffic volume may change. By Day 90, ensure your dashboard includes "off-site" metrics (like Share of Search) so you can prove to the board that visibility is increasing, even if clicks are flat.

Train your people (**Play 23 & Section 5**): Run your first "lunch and learn" on AI productivity. Frame it as using the change management principles; this is about "augmenting" their skills, not replacing them.

Now that you have a plan, you need a starting point. To help you...

## Get your free visibility baseline

Supertools

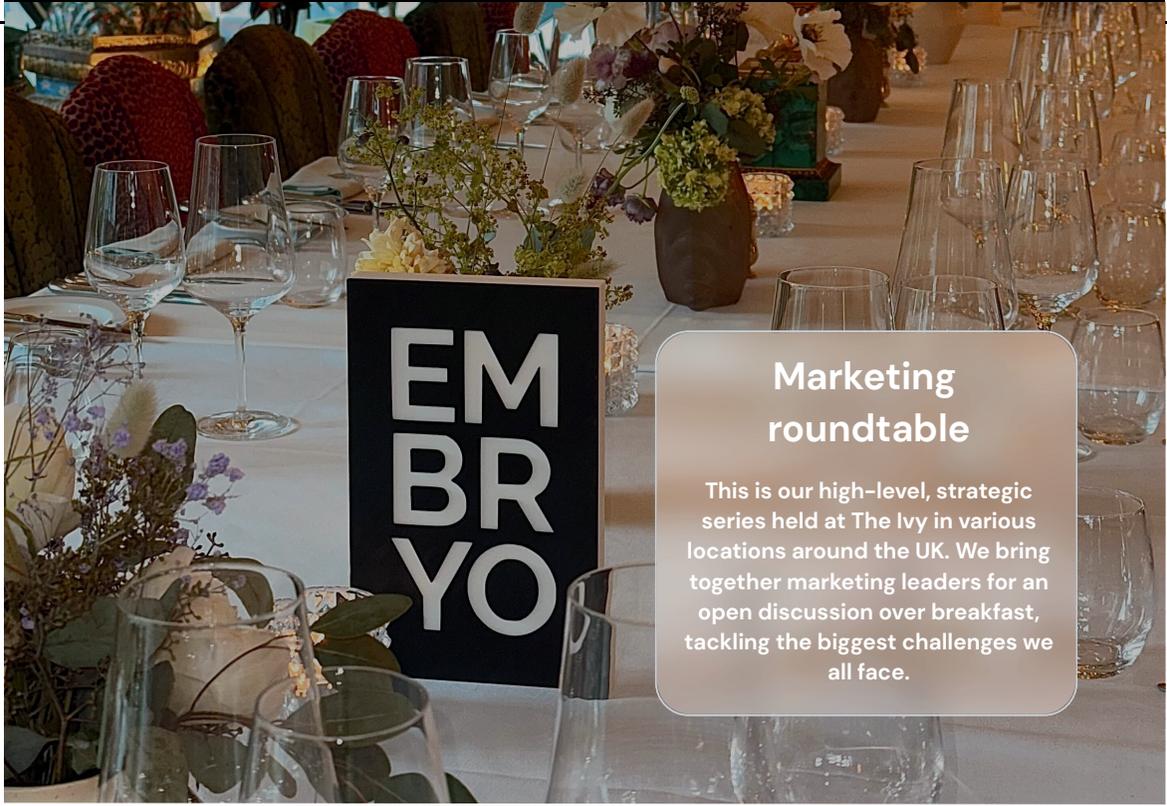
To help you find your starting point, we're offering a free, no-obligation online visibility and competitor analysis report.

Powered by our proprietary tech, Supertools®, this report helps turn complex data cuts through the noise. It will give you a clear, data-driven snapshot of your current performance, benchmark against your key competitors, and uncover the immediate, actionable opportunities you can take advantage of.

This provides the data-driven foundation for your 2026 plan.

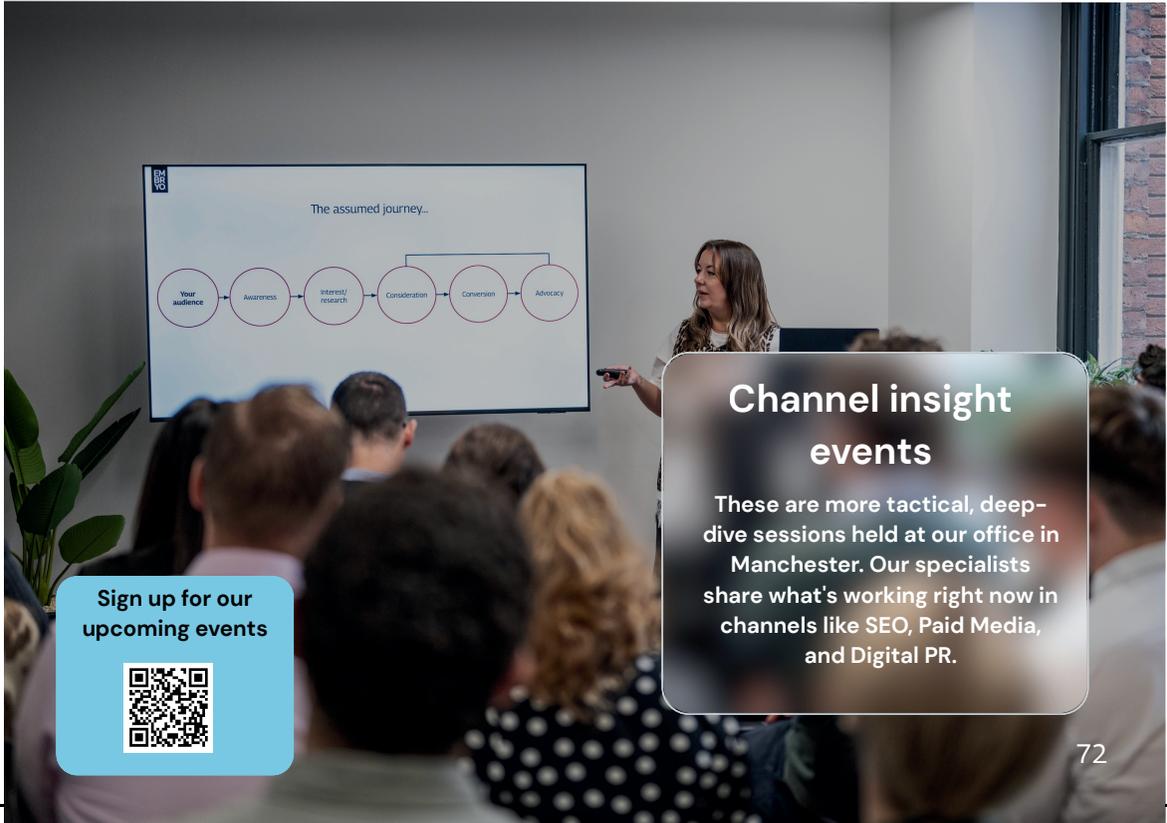
Search Visibility ①





## Marketing roundtable

This is our high-level, strategic series held at The Ivy in various locations around the UK. We bring together marketing leaders for an open discussion over breakfast, tackling the biggest challenges we all face.



## Channel insight events

These are more tactical, deep-dive sessions held at our office in Manchester. Our specialists share what's working right now in channels like SEO, Paid Media, and Digital PR.

Sign up for our upcoming events



## Stay ahead of the curve

The only constant is change, and even some of the AI tech we've discussed will evolve by Q2, new buyer trends will emerge, and Google's algorithm will shift, again. Your education can't stop with this document.

Fear not, we track these changes for you, so you can stay focused on your job.

### Visit our "Industry Updates" page:

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### Get our monthly newsletter:

It's a concise, value-packed summary of what actually matters. You'll get our latest articles, alerts on critical changes in the marketing world, and updates from inside Embryo.



The journey to becoming a true revenue-led, AI-enabled marketing function is a significant one. If at any stage you are looking for a strategic partner to help you implement these changes and drive results across every channel, our team is here.

For a direct, no-obligation conversation about your specific goals and how we can apply these principles to your business, please get in touch at [info@embryo.com](mailto:info@embryo.com).



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