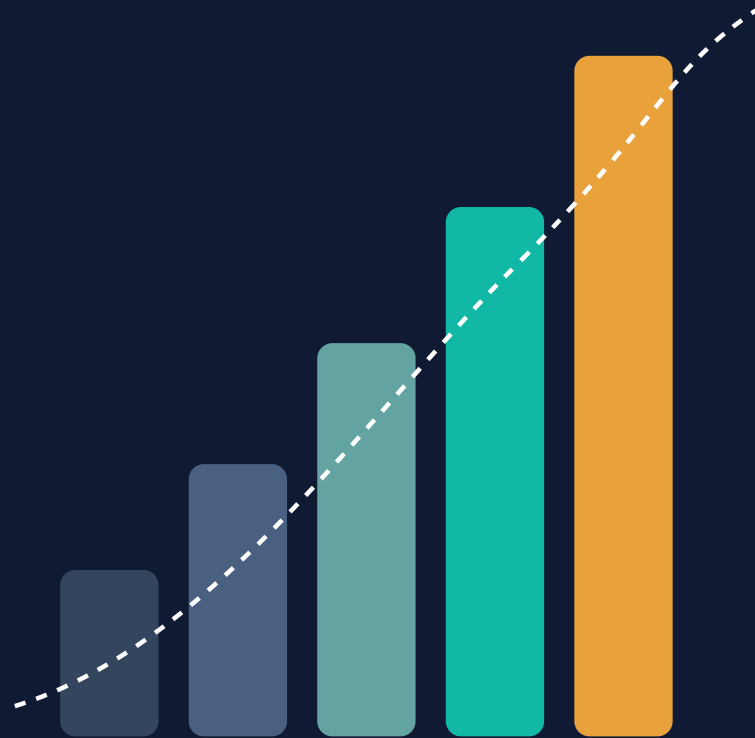


THE CMO'S GUIDE TO

The Demand Generation Maturity Model

From campaign execution to predictable revenue: a practical roadmap for building a world-class B2B demand generation function



2026 EDITION

A CMO's framework for assessing, benchmarking and transforming demand generation capabilities

14 DIMENSIONS · 5 LEVELS · EXECUTIVE ASSESSMENT

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Demand generation maturity in two pages

Demand generation maturity is not about doing more marketing. It is about building the capabilities, systems, processes, intelligence and commercial accountability that make revenue growth predictable and sustainable.

— The problem this model addresses

Most B2B marketing functions are judged on outcomes they only partly control and managed through metrics that describe effort rather than effect. Buying has become more collective and less visible: Forrester found an average of 13 people involved in a purchase, with 89% of purchases spanning two or more departments,^[1] while Gartner found 61% of buyers prefer an overall rep-free buying experience.^[2] Meanwhile, only a small fraction of any market is buying at a given time.^[3] Teams that respond by adding channels and tools rarely become more predictable. Teams that strengthen how their channels, data and sales partnership work together usually do.

— The model

The Demand Generation Maturity Model assesses **14 dimensions** across **five levels**: Reactive, Repeatable, Integrated, Predictive and Adaptive. Each level describes a genuine difference in capability and commercial outcome, not a larger budget. Maturity is multidimensional: a company may be Level 4 in paid media and Level 2 in reporting, and that imbalance usually explains its results better than any single score.

— Six principles

1. **Measure what the business values.** Progress means moving from activity metrics to pipeline, revenue, customer economics and, ultimately, incremental impact.
2. **Foundations cap everything else.** Strategy, measurement, data and sales partnership are dependencies. Weakness there limits the return on every channel.
3. **The right level depends on the model.** A high-velocity SMB business and an enterprise seller with a nine-month cycle need different targets. Level 5 everywhere is neither necessary nor affordable.
4. **Accounts and buying groups, not just leads.** Mature functions measure progress across the group that decides.
5. **AI is a capability, not a tool count.** It matures when embedded in governed workflows that measurably improve speed, quality or results.
6. **Averages hide weaknesses.** Prioritise the gap between current and target maturity, weighted by business criticality and dependency.

— The five levels

Reactive

- 1 Fragmented, tactical and activity-driven. Success depends on individuals.

Repeatable

- 2 Foundations and documented processes emerge. Reporting is regular but lead-centric.

Integrated

- 3 Channels, systems, people and reporting work as one system tied to pipeline.

Predictive

- 4 Intelligence, orchestration and personalisation are driven by data and intent.

Adaptive

- 5 A continuously learning revenue engine that invests on marginal, validated returns.

— How to use it

1. **Assess** each dimension against the matrix (15–20 minutes), recording current level, 12-month target and business criticality.
2. **Prioritise** using the gap multiplied by criticality, sequencing foundational dependencies first.
3. **Revisit** the scores each quarter, since maturity should rise as gaps close and priorities shift.

— What a typical result reveals

In the illustrative profiles in Chapter 18, a fast-growing scale-up scores 2.4 on average but has its two most serious gaps, ABM and measurement, in dimensions critical to its plan. An enterprise business scores higher on average yet is held back by sales alignment and website personalisation despite mature technology. Neither problem is visible in the average.

Where does your function stand?

Complete the assessment in Chapter 18 and compare your own profile with the two worked examples there. Contact details for a facilitated assessment are on the final page.

PART I

The model

Why maturity matters, the five levels and the fourteen dimensions of demand generation capability.



Maturity, not more marketing

When pipeline falls short, the instinctive response is to do more: another channel, another campaign, another tool. It rarely works, because the constraint is usually not activity. It is how activity connects to the accounts that matter, to sales and to the numbers the business runs on.

Consider two marketing functions with the same budget. The first runs more campaigns across more channels, reports record lead volumes and still cannot explain to the CFO why pipeline is flat. The second runs fewer programmes, but each is aimed at defined accounts, connected to a sales play and measured on opportunities. The second team will usually produce more pipeline at lower cost, and, crucially, it will know why, so it can do it again.

That difference is what this book calls maturity: the capability to produce pipeline and revenue *predictably*, explain how it was produced, and improve the system each quarter. It is a property of the whole function (strategy, channels, data, people and the partnership with sales), which is why it cannot be bought in a single platform purchase or hire.

A mature demand generation function is not the one doing the most. It is the one that knows which of its activities create revenue, and has the systems to do more of those.

What changes as a function matures

	Low maturity	High maturity
Unit of focus	Leads and campaigns	Accounts, buying groups and opportunities
Primary metric	Volume and cost per lead	Pipeline, revenue, CAC and incremental return
Planning	Annual calendar of activities	Reverse-funnel plan, reforecast quarterly
Sales relationship	Hand-off and dispute	Shared targets, plans and rhythm
Technology	Tools owned by channel	Integrated data used across the function
Learning	Opinions and anecdotes	Experiments, cohorts and documented decisions

How to use this book

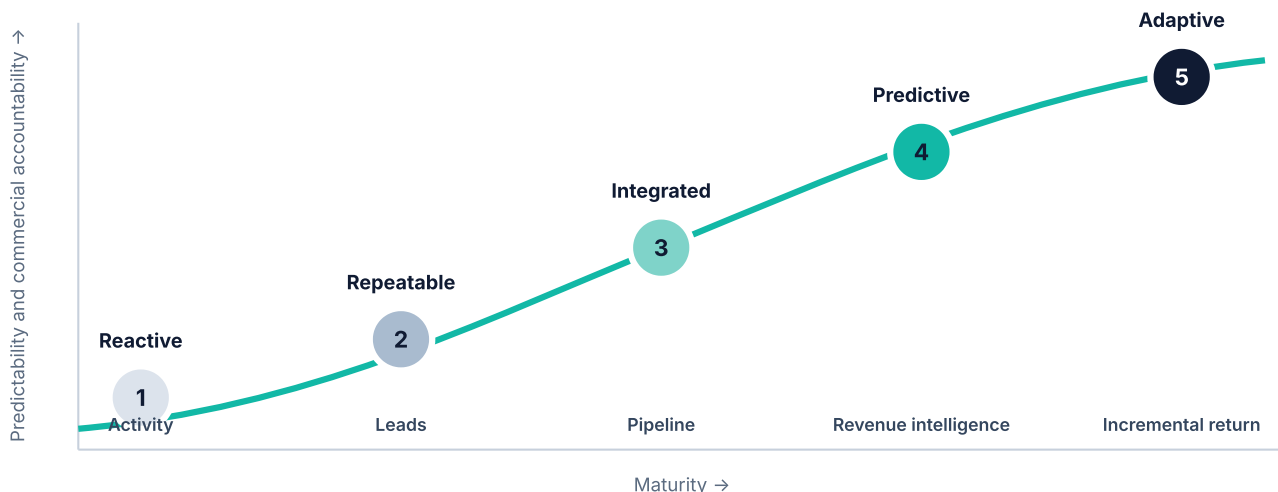
Part I explains the five levels and fourteen dimensions and contains the complete maturity matrix. Part II devotes a chapter to each dimension. Every chapter follows the same structure: why the capability matters, the five-level progression with its technology and metrics, the people and process changes involved, a progression roadmap, warning signs, an illustrative example of excellence and diagnostic questions for executives. Three feature chapters, on the website, account-based marketing, and measurement and analytics, go deeper. Part III turns the model into a scored executive assessment, illustrated with two worked company profiles.

A note on evidence

This book distinguishes four kinds of content. **Published research** is cited with a numbered reference (see Sources). **Established practice** describes how mature teams commonly operate. **Recommendations** are the author's point of view. **Illustrative examples and calculations** are clearly labelled, use fictional data and are internally consistent so that they can be checked. Illustrative examples of excellence are composites, not descriptions of named companies.

The five levels of maturity

The five levels describe how a demand generation function, or any one of its capabilities, evolves from fragmented activity to a continuously learning revenue engine.



The five-stage demand generation maturity curve. The label under each level is its dominant unit of measurement.

LEVEL 1 Reactive	LEVEL 2 Repeatable	LEVEL 3 Integrated	LEVEL 4 Predictive	LEVEL 5 Adaptive
Fragmented, tactical and activity-driven. Success depends on individuals. - Ad hoc campaigns and inconsistent execution - Heavy manual work; disconnected tools - Siloed channels; vanity metrics - Limited sales alignment; success depends on individuals Typical constraint: Nobody can say what works	Foundations and documented processes emerge. Reporting is regular but lead-centric. - Defined campaign processes; basic automation - Documented channel strategies; initial segmentation - CRM and MAP workflows; regular reporting - Emerging lead qualification; some sales alignment Typical constraint: Volume is mistaken for value	Channels, systems, people and reporting work as one system tied to pipeline. - Integrated multichannel campaigns; defined ICPs - Governed funnel and lifecycle; reliable CRM-MAP - Pipeline reporting; account-based programmes - Structured experimentation and optimisation Typical constraint: Insight outpaces action	Intelligence, orchestration and personalisation are driven by data and intent. - Intent-based engagement; predictive scoring - Dynamic personalisation; advanced ABM - Sophisticated attribution; revenue forecasting - Automated cross-channel workflows; AI-assisted optimisation Typical constraint: Complexity and data quality	A continuously learning revenue engine that invests on marginal, validated returns. - Coordinated account intelligence across channels - Personalisation throughout the journey; governed AI - Incrementality-based decisions; marginal returns - Embedded experimentation; full-funnel accountability Typical constraint: Sustaining discipline as the business changes

— Maturity is multidimensional

No organisation sits neatly at one level. It is common to find a team at Level 4 in paid media, with sophisticated bidding and audience automation, alongside Level 2 reporting that cannot connect any of that spend to pipeline. The imbalance matters more than the average, because capabilities depend on one another. Predictive scoring is

only as good as the CRM data behind it; personalisation needs segment messaging; ABM needs a sales team that acts on account signals. The model therefore asks you to assess each dimension separately and then look for the weakest critical link.

— Levels reflect capability, not budget

A larger budget or a more expensive platform does not move a team up a level. Level 3, for example, is defined by integration: a shared ICP, governed lifecycle stages, closed-loop reporting and a working sales partnership. A five-person team with a well-configured CRM and MAP can reach it; a fifty-person team with a dozen disconnected platforms may not.

— The right target depends on your go-to-market model

Not every organisation should pursue Level 5, and not in every dimension. The appropriate level depends on company size, go-to-market motion, average contract value, sales-cycle length and resources. The table below offers indicative 12-month targets for three common models. These are recommendations, not benchmarks.

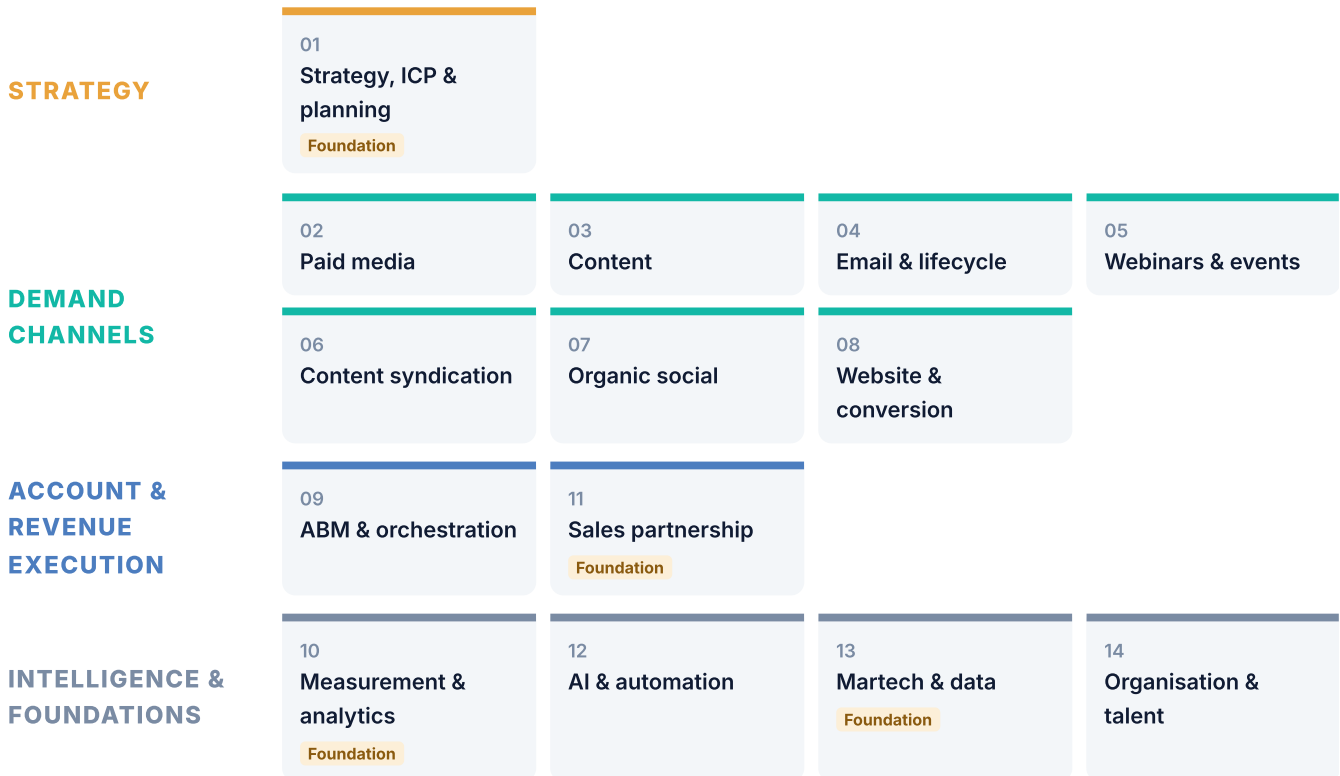
Dimension	High-velocity SMB / product-led ACV under £15k; cycle under 30 days	Mid-market sales-led ACV £15k–£100k; cycle 2–6 months	Enterprise ACV over £100k; cycle 6+ months
Strategy, ICP & planning	3	3–4	4
Paid media	4	3–4	3
Content	3	3–4	4
Email & lifecycle	4	3–4	3
Webinars & events	2	3	4
Content syndication	1–2	3	3
Organic social	3	3	3–4
Website & conversion	4	3–4	4
ABM & orchestration	1–2	3	4–5
Measurement & analytics	4	3–4	4
Sales partnership	2–3	4	4–5
AI & automation	3	3	3–4
Martech & data	3–4	3	4
Organisation & talent	3	3	4

Indicative 12-month target levels by go-to-market model (recommendation, not benchmark).

Two patterns stand out. High-velocity and product-led businesses gain most from lifecycle, website and measurement maturity, and little from heavy ABM. Enterprise sellers with long cycles and large deals gain most from ABM, events, sales partnership and account-level measurement. Mid-market businesses usually need to be solidly Integrated almost everywhere before advancing selectively.

The fourteen dimensions

The model groups demand generation into fourteen dimensions across four clusters: strategy, demand channels, account and revenue execution, and the intelligence and foundations that every other capability relies on.



The 14-dimension maturity framework, grouped into four clusters. Foundational dependencies are marked.

The clusters are not a hierarchy, but they do imply a sequence. Strategy determines what the channels should do. Account and revenue execution determines whether channel output turns into revenue. Intelligence and foundations determine whether any of it can be measured, automated and improved. Four dimensions (strategy and planning, measurement, sales partnership, and martech and data) are treated as **foundational dependencies** in the assessment, because weakness in any of them limits the return on the others.

— The complete maturity matrix

The matrix on the following pages summarises each dimension at each level. It doubles as the scoring guide for the assessment in Chapter 18: for each dimension, select the highest level whose description your organisation meets in full and can evidence.

Dimension	1 · Reactive	2 · Repeatable	3 · Integrated	4 · Predictive	5 · Adaptive
01 Strategy, ICP & planning	Plans are lists of campaigns driven by internal requests. The ICP is implicit and targets are lead volumes.	An annual plan with a documented ICP and personas. Targets are set as MQL volumes by quarter.	The plan is built backwards from the revenue target, with ICP tiers, sales capacity and channel mix modelled.	Planning uses segment economics, intent and conversion data. Scenarios are reforecast every quarter.	Planning is continuous. Investment moves monthly on marginal returns and validated incrementality.
02 Paid media	Ad hoc campaigns optimised on clicks and CTR. No CRM connection or conversion governance.	Structured campaigns by channel. CPL and MQLs tracked, with basic remarketing and creative testing.	ICP-aligned audiences and offline conversion imports. Optimised to cost per qualified opportunity.	Account-tiered, intent-fed media with bidding on pipeline value. CAC tracked by segment.	Budgets allocated on marginal and incremental return, validated through holdout and geo tests.
03 Content	Content produced on request with no plan or persona focus. Success means downloads.	An editorial calendar and content pillars, gated assets by persona, and basic SEO and reuse.	A journey-mapped portfolio on a modular architecture. Content influence on pipeline is reported.	Content personalised by industry, stage and account. AI-assisted production under QA governance.	A proprietary research engine. Investment steered by revenue contribution and search visibility.
04 Email & lifecycle	Batch-and-blast sends to one list. Opens and clicks reported; deliverability unmanaged.	Segmented lists, authenticated domains and persona nurtures. Basic lead scoring in place.	Lifecycle stages governed in CRM. Behaviour-triggered journeys; stage progression measured.	Account-aware orchestration with predictive scoring. Journeys branch on intent and sales activity.	Next-best-action journeys across email, sales and media, judged on incremental opportunity creation.
05 Webinars & events	Events chosen opportunistically. Success means registrations and badge scans.	An annual event calendar. Attendance rates tracked; standard follow-up within a week.	Events tied to target segments, with sales pre-booking meetings. Sourced and influenced pipeline reported.	Account-based executive programmes used to accelerate named opportunities and buying groups.	The event portfolio is managed as an investment mix, optimised on velocity and win-rate impact.

Dimension	1 · Reactive	2 · Repeatable	3 · Integrated	4 · Predictive	5 · Adaptive
06 Content syndication	Leads bought on volume and lowest CPL with little validation. Sales distrusts the output.	ICP filters and validation rules agreed with publishers. Leads routed into nurture.	Intent overlays and account lists applied. Results measured through to sales acceptance and pipeline.	Targeted to buying-group gaps in priority accounts. Suppliers managed with quality scorecards.	Spend moved between publishers on cost per opportunity and incremental account progression.
07 Organic social	Irregular company posts and vanity metrics. No executive or employee participation.	A content calendar and some executive posting. Follower growth and engagement tracked.	Executive and employee advocacy, social selling by SDRs, and monitoring of ICP audience composition.	Social signals feed account scoring. Dark-social influence captured through self-reported attribution.	A coordinated point-of-view programme building branded demand, measured against search and pipeline.
08 Website & conversion	A brochure site with generic messaging, basic forms and traffic reporting.	Defined conversion paths, persona landing pages, SEO foundations and CRM-linked forms.	Industry and campaign experiences, A/B testing, enrichment, routing and meeting booking.	Dynamic account and intent-based personalisation, account-aware chat and engagement alerts to sales.	Orchestrated 1:few and 1:1 experiences optimised on pipeline per visit, under governed consent.
09 ABM & orchestration	A target list exists but programmes are generic. Success is reported as account reach.	Tiered named accounts and 1:many campaigns with targeted ads. Engagement tracked at contact level.	1:many and 1:few motions with shared account plans. MQAs and account pipeline reported.	Intent and buying-group intelligence drive orchestration. Journey stages and velocity measured.	An integrated 1:1, 1:few and 1:many portfolio judged on target-account revenue, win rate and expansion.
10 Measurement & analytics	Activity metrics from each platform, in spreadsheets, with no shared definitions.	Lead funnel reporting with MQL and SQL conversion, and CPL by channel.	Closed-loop CRM reporting of sourced and influenced pipeline, cost per opportunity and velocity.	Account-based and multi-touch views, with CAC, payback and forecasting by segment.	Incrementality testing, mix modelling and budget optimisation on marginal return.

Dimension	1 · Reactive	2 · Repeatable	3 · Integrated	4 · Predictive	5 · Adaptive
11 Sales partnership	Leads handed over by email or list. No SLA, and sales feedback is anecdotal.	Agreed lead definitions, routing and a follow-up SLA, with monthly lead reviews.	A shared ICP and funnel targets, SDR orchestration and joint pipeline reviews with feedback loops.	Joint account plans, deal intelligence, opportunity acceleration plays and a shared forecast.	One revenue team with common targets, one operating rhythm and shared accountability for growth.
12 AI & automation	Individuals use generative AI ad hoc for copy and research, without guidance.	Approved tools and prompt libraries. Repeatable use in drafting, research and planning.	AI embedded in governed workflows across content, analytics and campaign execution.	AI drives personalisation, account research, predictive analysis and decision support.	Governed, partly autonomous operations with human oversight and measured business value.
13 Martech & data	Disconnected tools, duplicate records and unclear data ownership.	CRM and MAP integrated, with basic field standards, UTM conventions and consent capture.	Lead-to-account matching, enrichment, a lifecycle taxonomy and documented integrations.	A warehouse-centred data model, identity resolution, data-quality monitoring and governance.	A composable, governed architecture activating first-party data in near real time.
14 Organisation & talent	Generalists respond to requests. Success depends on individuals; little is documented.	Defined roles and campaign process, quarterly planning, and agencies managed by channel.	A pod or segment structure partnered with RevOps, documented playbooks and a test cadence.	Specialist centres of excellence, capacity modelling and leaders accountable for commercial outcomes.	A learning organisation with embedded experimentation, resilient documentation and a talent pipeline.

PART II

The dimensions in depth

Fourteen chapters, one per dimension. Website, account-based marketing, and measurement and analytics are feature chapters.



Demand Generation Strategy, ICP and Planning

WHY THIS CAPABILITY MATTERS

Every other dimension inherits its quality from this one. A demand generation function that cannot say which accounts it exists to win, how much pipeline the business needs from marketing, and what that pipeline should cost will optimise each channel in isolation and still miss the number. Strategy is where marketing turns a revenue target into a set of choices: which segments, which buying problems, which motions, which channels, and how much capacity in sales to convert what it creates.

Two realities make this harder than it was. Buying decisions now involve more people: Forrester's 2024 buyer research found an average of 13 people involved and 89% of purchases spanning two or more departments.^[1] And most of the market is not buying at any given moment: the LinkedIn B2B Institute, drawing on Ehrenberg-Bass research, estimates that only around 5% of B2B buyers are in-market at once.^[3] A mature plan accounts for both: it captures the in-market minority efficiently and builds memory with the out-of-market majority.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	The plan is a calendar of campaigns, events and asset requests. The ICP lives in people's heads, and targets are lead volumes that bear no tested relationship to revenue. TECHNOLOGY Spreadsheets and slide decks MEASURED BY Leads, campaigns launched
Level 2 Repeatable	An annual plan documents the ICP, core personas and priority segments. Targets are MQL volumes by quarter, and budget is split by channel based mostly on last year's allocation. TECHNOLOGY CRM reports; persona documents MEASURED BY MQL volume against target
Level 3 Integrated	The plan is built backwards from the bookings target through win rates, opportunity values and conversion rates, then checked against sales and SDR capacity. ICP tiers drive channel and motion choices. TECHNOLOGY Funnel model linked to CRM actuals; firmographic data MEASURED BY Pipeline coverage; reverse-funnel targets
Level 4 Predictive	Segment-level economics (CAC, cycle length, win rate, ACV) shape where marketing invests. Intent and engagement data inform account selection, and the plan is reforecast every quarter against several scenarios. TECHNOLOGY Intent and fit models; BI scenario tools MEASURED BY Segment CAC, win rate and velocity
Level 5 Adaptive	Planning is a continuous discipline rather than an annual event. Budget moves monthly towards the highest marginal return, validated by experiments, and the balance between demand capture and demand creation is set explicitly. TECHNOLOGY Mix modelling and experiment results inform allocation MEASURED BY Marginal and incremental return by investment

PEOPLE, PROCESS AND OPERATING MODEL

At low maturity, the marketing leader writes the plan alone and presents it. At Level 3 the plan is co-built with sales leadership, RevOps and finance, so the conversion assumptions are shared rather than disputed later. At Level 4 and beyond, a quarterly business review replaces the annual plan as the main decision forum, and each segment or motion has a named owner accountable for pipeline and efficiency, not activity.

PROGRESSION ROADMAP

1 → 2: Write down the ICP, personas and segment priorities, and agree MQL definitions with sales.

2 → 3: Build a reverse-funnel model from the bookings target and check it against sales capacity before setting channel budgets.

3 → 4: Add segment economics and intent data; replace the annual plan with quarterly reforecasting.

4 → 5: Introduce structured experiments and marginal-return analysis into budget decisions.

WARNING SIGNS

- Targets set in leads with no link to the bookings plan
- Budget allocated by habit or by channel owner lobbying
- The ICP is defined so broadly that it excludes no one
- Sales capacity is never checked against the pipeline plan
- No explicit budget for demand creation, so only in-market buyers are reached

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A scale-up selling finance software sets its annual plan from a £12m new-business target. Working backwards through a 24% win rate and £70k average opportunity, it needs roughly 715 qualified opportunities, of which marketing commits to source 45%. The plan splits investment between three ICP tiers, reserves a fixed share for out-of-market brand building, and is reforecast each quarter when actual conversion rates diverge from assumptions.

EXECUTIVE ASSESSMENT QUESTIONS

1. Can we trace our marketing target back to the bookings plan, step by step?
2. Which segments would we deliberately stop targeting if budget fell by 20%?
3. Do we know the CAC and sales cycle for each of our top three segments?
4. How much of our budget creates future demand rather than capturing current demand?

Paid Media and Performance Marketing

WHY THIS CAPABILITY MATTERS

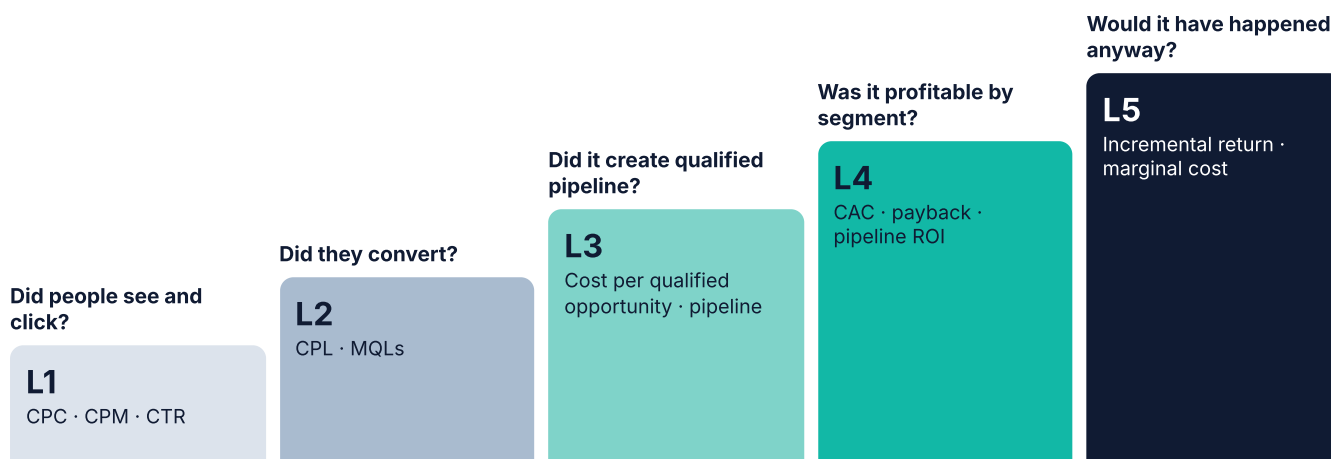
Paid media is usually the largest controllable line in the demand budget and the fastest lever a leader can pull. That speed is also its risk: platforms optimise towards whatever signal they are given, and if that signal is a form fill, they will find the cheapest form fills, not the best customers. Paid media maturity is therefore mostly about the quality of the feedback loop between ad platforms and commercial outcomes, not about the number of channels or the sophistication of the bidding.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Campaigns launch in response to events or requests. Google Search and LinkedIn are run separately, often by different people, optimised on CPC, CTR and impressions, with conversion tracking that is incomplete or counts page views. TECHNOLOGY Native ad platforms; manual reporting MEASURED BY CPC, CPM, CTR, impressions
Level 2 Repeatable	Each channel has a documented structure, naming convention and budget. CPL and MQL volume are tracked, remarketing lists exist, and creative is tested, but mostly on click-through rather than downstream quality. TECHNOLOGY Platform pixels; GA4; MAP form tracking MEASURED BY CPL, MQLs, conversion rate
Level 3 Integrated	Audiences are built from the ICP and CRM: matched account lists, job-function targeting and exclusion of customers and poor-fit segments. Offline conversion imports pass qualified stages back to platforms, so bidding optimises towards opportunities. TECHNOLOGY CRM-to-ads offline conversion imports; matched audiences MEASURED BY Cost per qualified opportunity; sourced pipeline
Level 4 Predictive	Media is planned by account tier and buying stage. Intent signals and first-party audiences activate campaigns automatically, value-based bidding uses pipeline values, and CAC and payback are tracked by segment and channel. TECHNOLOGY Intent and ABM platforms; value-based bidding; BI MEASURED BY CAC and payback by segment; pipeline ROI
Level 5 Adaptive	Investment is managed as a portfolio on marginal return. Holdout and geo experiments validate which spend is incremental, diminishing returns are modelled per channel, and AI-assisted tools test creative and reallocate budget within governed limits. TECHNOLOGY Experimentation design; mix models; budget optimisation tools MEASURED BY Incremental return; marginal cost per opportunity

— The measurement ladder in paid media

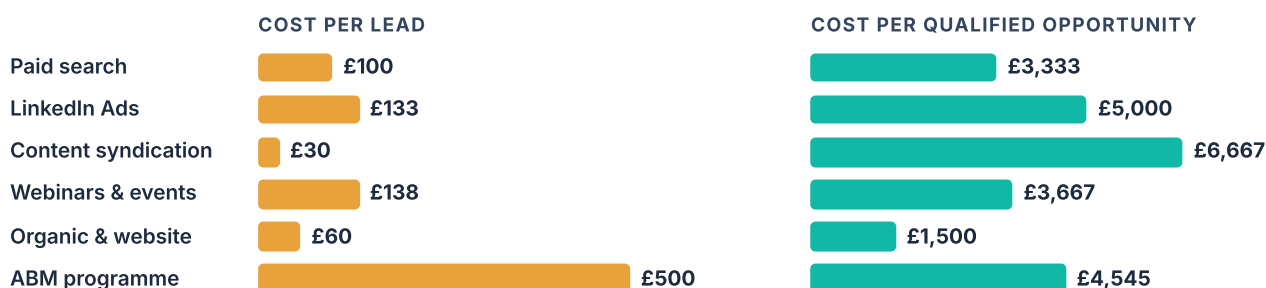
The most important shift in paid media maturity is the metric the team optimises against. Each step up the ladder below moves the optimisation target closer to revenue, and each step requires a data connection the previous level did not have.



Paid media measurement evolution: each level moves the optimisation target closer to revenue.

— Why the lowest CPL rarely produces the cheapest customer

The illustrative quarter below (used throughout this book, see Chapter 13) shows the pattern most demand leaders recognise. Content syndication delivers the lowest cost per lead by a wide margin and the highest cost per qualified opportunity. Paid search costs more than three times as much per lead and half as much per opportunity.



ILLUSTRATIVE Cost per lead versus cost per qualified opportunity by channel, from the illustrative quarter in Chapter 13.

Three mechanisms drive this gap. First, cheap leads are typically less qualified and less intentful, so fewer convert. Second, they consume SDR capacity that could have been spent on better leads, which is a real cost that never appears in the CPL. Third, platforms trained on cheap conversions learn to find more of the same. The fix is not to ban low-cost channels but to judge every channel on cost per opportunity and pipeline per pound, and to feed qualified stages back to the platforms.

— Diminishing returns: average cost hides marginal cost

Average efficiency figures disguise what the next pound buys. In the illustrative example below, raising paid search spend from £150k to £200k lifts the average cost per opportunity by a fifth, from £3,333 to £4,000, but the last £50k buys opportunities at £10,000 each, more than three and a half times the cost of the first tranche.

Quarterly paid search spend	Qualified opportunities	Average cost per opportunity	Marginal cost of the last tranche	
£100,000	36	£2,778	£2,778	
£150,000	45	£3,333	£5,556	
£200,000	50	£4,000	£10,000	

ILLUSTRATIVE Diminishing returns in paid search. The marginal cost of the last £50k is £10,000 per opportunity, while the average is £4,000.

Mature teams therefore set a ceiling for marginal cost per opportunity by channel and reallocate spend once a channel crosses it. Because platform-reported conversions overstate causal impact (some of those buyers would have arrived anyway), Level 5 teams validate the curve with holdout tests before trusting it.

— Operating essentials by channel

- **Google and Microsoft Search:** separate brand, competitor, category and problem-intent campaigns; negative keyword governance; offline conversion imports (Google's enhanced conversions for leads or equivalent); landing pages matched to query intent.
- **LinkedIn Ads:** matched company and contact audiences by tier; job-function and seniority layering; Conversation and Document Ads for mid-funnel; lead gen forms synced to the MAP with qualification fields; frequency management across the buying group.
- **Programmatic and ABM display:** account-level reach and engagement rather than clicks; strict placement and fraud controls; measured on account progression.
- **Review sites and niche publishers:** often small in volume but high in intent for software buyers; judged on opportunity conversion.
- **Attribution settings:** Google retired first-click, linear, time-decay and position-based models from Google Ads and GA4 in 2023, leaving data-driven and last-click attribution.^[4] Teams that relied on rules-based models need a CRM-based view of contribution instead.

PEOPLE, PROCESS AND OPERATING MODEL

At Levels 1 and 2, paid media is often owned by an agency or a single specialist who reports platform metrics. From Level 3, the paid lead works from a shared definition of a qualified opportunity, joins pipeline reviews, and is accountable for cost per opportunity. At Level 4, paid media, ABM and marketing operations plan together, because audiences, intent triggers and offline conversion flows cross all three.

PROGRESSION ROADMAP

1 → 2: Standardise campaign structure, naming and UTM taxonomy; fix conversion tracking.

2 → 3: Connect CRM stages to platforms through offline conversion imports; optimise to qualified opportunities.

3 → 4: Tier audiences by account priority, activate intent signals, and move to value-based bidding.

4 → 5: Run holdout tests, model diminishing returns, and allocate on marginal return.

WARNING SIGNS

- Platform-reported conversions are the main success metric
- Customers and open opportunities are not excluded from prospecting
- CPL falls while opportunity volume stays flat
- Agency reports never mention pipeline
- Budget rises in a channel without checking the marginal return

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A cybersecurity vendor imports opportunity creation and pipeline value from its CRM into Google Ads and LinkedIn daily. Bidding optimises on pipeline value, tier 1 accounts receive always-on LinkedIn coverage across nine buying-group roles, and each quarter one channel runs a geographic holdout. Spend is moved monthly once a channel's marginal cost per opportunity exceeds an agreed ceiling.

EXECUTIVE ASSESSMENT QUESTIONS

1. Which of our paid channels has the lowest cost per qualified opportunity, not per lead?
2. Do our ad platforms receive opportunity and pipeline data from the CRM?
3. What would the next £50k in our largest channel buy, at the margin?
4. When did we last test whether a channel's results were incremental?

Content Strategy, Creation and Management

WHY THIS CAPABILITY MATTERS

Content is the raw material for almost every other dimension: paid media needs offers, email needs reasons to engage, ABM needs account-relevant insight, and sales needs material that helps buyers make a case internally. Gartner research published in 2025 found that 61% of B2B buyers prefer an overall rep-free buying experience,^[2] which means content now does much of the work a salesperson once did. Low-maturity teams treat content as volume to be produced. High-maturity teams manage it as a portfolio of revenue assets with a clear job in the buying journey.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Content is produced on request from product, sales or leadership. There is no editorial plan, little persona focus and no consistent quality bar. Success is measured in downloads and page views. TECHNOLOGY Shared drives; CMS MEASURED BY Downloads, page views
Level 2 Repeatable	An editorial calendar and three to five content pillars exist. Gated assets are produced per persona, SEO basics are in place, and some assets are repurposed across channels. TECHNOLOGY Editorial calendar; SEO tools; MAP gating MEASURED BY Leads per asset, organic traffic
Level 3 Integrated	The portfolio is mapped to buying-journey stages and buying-group roles. Pillar assets are built modularly so they can be broken into derivatives. Content influence on opportunities is tracked in the CRM. TECHNOLOGY DAM or content hub; CRM content-touch tracking MEASURED BY Content-influenced pipeline; engagement depth
Level 4 Predictive	Content is personalised by industry, stage and account tier, often assembled from modular components. AI supports research, drafting and localisation inside a governed quality-assurance process. Visibility in AI search assistants is monitored alongside organic search. TECHNOLOGY Personalisation engines; governed generative AI; AI-search monitoring MEASURED BY Stage progression and win-rate lift by content
Level 5 Adaptive	Proprietary research and original data give the brand a distinctive point of view that competitors cannot copy. Investment is steered by contribution to pipeline, win rates and branded demand, and content is retired as deliberately as it is created. TECHNOLOGY Research tooling; content analytics linked to revenue MEASURED BY Revenue contribution; branded search; share of voice

— The content-to-revenue operating model

Mature content operations run as a loop, not a production line. Insight from customers, sales calls and data feeds a small number of substantial pillar assets. These are broken into modular derivatives, distributed through paid, owned and sales channels, and measured on engagement quality and pipeline contribution. The results then shape the next round of insight.



The content-to-revenue operating model.

The practical consequence is fewer, better assets. A team producing forty unconnected pieces a quarter typically sees less pipeline impact than one producing a single original research report, decomposed into twenty derivatives for specific roles, industries and stages.

AI search visibility is a new discipline worth naming explicitly. Buyers increasingly ask AI assistants to shortlist vendors and explain categories; Forrester reported that almost 95% of buyers expected to use generative AI in their purchase process within a year.^[1] Content that is clearly structured, factually specific and widely cited is more likely to be surfaced. Treat this as an extension of SEO governance, not a separate content stream.

PEOPLE, PROCESS AND OPERATING MODEL

Content matures from a service function to an editorial one. At Level 3, a managing editor owns the portfolio, product marketing owns message accuracy, and demand generation owns distribution and performance. At Level 4, content operations (taxonomy, modular components, AI workflows and QA) becomes a defined role, so that scale does not erode quality or brand consistency.

PROGRESSION ROADMAP

1 → 2: Set pillars, personas and an editorial calendar; introduce a quality bar and review process.

2 → 3: Map content to journey stages and buying-group roles; tag assets so CRM can track influence.

3 → 4: Build modular content architecture; introduce governed AI production and personalisation by segment.

4 → 5: Invest in proprietary research and steer the portfolio by revenue contribution.

WARNING SIGNS

- Most assets have no defined audience or journey stage
- Success is reported in downloads only
- Sales cannot find or does not use marketing content
- AI-generated drafts are published without expert review
- Old content is never updated or retired

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A fintech platform publishes one benchmark report a year based on anonymised product data. It is decomposed into industry briefs, role-specific summaries, webinar series, sales talk tracks and account-specific one-pagers for tier 1 accounts. Opportunities that engaged with the research progress faster, and the team uses that evidence to decide next year's research question.

EXECUTIVE ASSESSMENT QUESTIONS

1. Which five assets contributed most to pipeline last quarter, and why?
2. Can sales find content for each buying-group role and stage in under a minute?
3. What do we publish that a competitor could not?
4. How do we govern the accuracy and brand quality of AI-assisted content?

04 Email Marketing, Nurture and Lifecycle Automation

WHY THIS CAPABILITY MATTERS

Email remains the most direct owned channel for moving known contacts through a buying decision, and it is also where poor practice is now penalised technically. Since 2024, Google and Yahoo have required bulk senders to authenticate with SPF, DKIM and DMARC, support one-click unsubscribe, and keep spam complaint rates below 0.3% (Google's threshold).^[5] The maturity question is not whether a team sends email, but whether its lifecycle programme moves people and accounts towards revenue rather than simply generating opens.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Batch-and-blast newsletters and promotions go to one large list. Opens and clicks are reported, data hygiene is occasional, authentication is incomplete and consent records are patchy. TECHNOLOGY Basic email tool; static lists MEASURED BY Opens, clicks, list size
Level 2 Repeatable	Lists are segmented by persona and region, domains are authenticated, and consent is captured at source. Persona nurtures run on fixed schedules, and basic lead scoring combines fit and engagement. TECHNOLOGY MAP; SPF, DKIM, DMARC; consent capture MEASURED BY Deliverability, MQLs from nurture
Level 3 Integrated	Lifecycle stages are defined and governed in the CRM. Journeys are triggered by behaviour (pricing page visits, content consumption, event attendance), branch on engagement, and recycle leads that sales rejects. TECHNOLOGY MAP–CRM lifecycle sync; behavioural triggers MEASURED BY Stage-to-stage conversion; recycled-lead yield
Level 4 Predictive	Email is account-aware: messaging changes with account stage, buying-group coverage and open opportunities. Predictive scoring prioritises contacts, and journeys pause or change when sales is actively engaged. TECHNOLOGY Predictive scoring; account-based orchestration MEASURED BY Account progression; time to opportunity
Level 5 Adaptive	Journeys are orchestrated across email, sales sequences and paid media from a next-best-action model. Programmes are judged on incremental opportunity creation and acceleration, tested with holdout groups. TECHNOLOGY Cross-channel journey orchestration; holdout testing MEASURED BY Incremental opportunities and velocity

DEEP DIVE

— Campaign performance is not progression

Email reporting tends to stop at engagement. The table below separates what an email campaign achieves from what the lifecycle programme achieves. Leaders should review the right-hand column monthly.

Campaign performance asks...	Lifecycle progression asks...
How many opened and clicked?	How many contacts moved to the next lifecycle stage?
Which subject line won?	Which journey produces sales-accepted leads fastest?

How large is our list?	What share of target accounts have engaged buying-group contacts?
What was the unsubscribe rate?	How many recycled leads re-entered pipeline this quarter?
Did the newsletter perform?	Did nurtured opportunities close faster than non-nurtured ones?

Note that Apple Mail Privacy Protection and similar features inflate open rates, which makes opens an unreliable signal on its own. Clicks, replies, site behaviour and stage movement are more trustworthy.

PEOPLE, PROCESS AND OPERATING MODEL

At low maturity, whoever needs an email sent builds it. At Level 3, a lifecycle marketer owns journey design and stage governance with marketing operations, and sales agrees what happens when a lead is rejected or recycled. At Level 4, lifecycle, ABM and SDR leaders share an orchestration plan so prospects do not receive a marketing nurture and a sales sequence on the same day.

PROGRESSION ROADMAP

1 → 2: Authenticate sending domains, clean lists, capture consent and segment by persona.

2 → 3: Define lifecycle stages in CRM; build behaviour-triggered journeys and a recycle path.

3 → 4: Make journeys account-aware and suppress or adapt them when sales is engaged.

4 → 5: Orchestrate across channels and measure incremental impact with holdouts.

WARNING SIGNS

- Open rate is the headline metric
- Rejected leads disappear rather than being recycled
- Prospects receive marketing and sales emails simultaneously
- DMARC is missing or never monitored
- No record of when and how consent was given

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

An enterprise software firm runs twelve journeys keyed to lifecycle stage and buying role. When an account shows a pricing-page surge, the journey switches to evaluation content and alerts the account executive, while the SDR sequence and nurture are de-duplicated automatically. A 10% holdout group shows nurtured accounts reach opportunity 18 days sooner.

EXECUTIVE ASSESSMENT QUESTIONS

1. Can we show how many contacts our journeys moved to the next stage last month?
2. What happens to a lead sales rejects?
3. Are we compliant with mailbox-provider sender requirements, and who monitors it?
4. Do our journeys know when an account is in an active opportunity?

Webinars, Field Marketing and Events

WHY THIS CAPABILITY MATTERS

Events and webinars are among the most expensive activities per contact and among the most powerful for building trust with a buying group. Their value is rarely in the registrations they produce; it lies in the conversations they enable with the right accounts and the opportunities they accelerate. Immature programmes count badge scans. Mature programmes plan which accounts must attend, what sales will do before and after, and which deals the event should move.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Events are selected opportunistically, often because a competitor attends. Webinars are scheduled when a speaker is available. Success is registrations and scans, and follow-up is a generic email weeks later. TECHNOLOGY Spreadsheets; badge scanners MEASURED BY Registrations, scans
Level 2 Repeatable	An annual calendar balances webinars, conferences and owned events. Registration-to-attendance rates are tracked, follow-up happens within a week, and on-demand recordings are reused. TECHNOLOGY Webinar platform; MAP integration MEASURED BY Attendance rate, MQLs per event
Level 3 Integrated	Each event targets defined segments or accounts. Sales pre-books meetings, follow-up is tailored by engagement level, and sourced and influenced pipeline are reported separately in the CRM. TECHNOLOGY Event platform–CRM sync; meeting booking MEASURED BY Meetings, sourced and influenced pipeline
Level 4 Predictive	Executive roundtables, customer events and account-based field programmes are designed around named accounts and open opportunities. Attendance by buying-group role is tracked, and events are used deliberately to accelerate deals. TECHNOLOGY Account-based event management; engagement scoring MEASURED BY Target-account attendance; deal acceleration
Level 5 Adaptive	The event portfolio is managed as an investment mix. Formats are compared on cost per opportunity, velocity and win-rate impact against matched non-attending accounts, and the calendar is rebalanced each half-year. TECHNOLOGY Matched-cohort analysis; portfolio modelling MEASURED BY Win-rate and velocity lift versus matched cohorts

DEEP DIVE

— Sourced versus influenced: report both, sum neither

Event-sourced pipeline is pipeline whose first qualifying interaction (by the agreed source rule) was the event. **Event-influenced pipeline** includes any open opportunity where a buying-group member attended. Influenced will always be larger and is the better measure of an event's role in acceleration, but it overlaps with every other channel's influenced figure and must never be added to them. Chapter 13 explains how to prevent double-counting.

A practical test for any event is the **pre-event account list**: if the team cannot name the twenty accounts it most needs in the room and the opportunities it intends to move, the event is a lead-generation tactic, not a revenue programme.

PEOPLE, PROCESS AND OPERATING MODEL

Field marketing matures from logistics to account strategy. At Level 3, field marketers plan with regional sales leaders and agree meeting targets per event. At Level 4, they own executive programme design and partner with ABM, customer success and executives who host. Sales participation is a requirement, not a favour.

PROGRESSION ROADMAP

1 → 2: Build an annual calendar with objectives per event; standardise follow-up.

2 → 3: Set account targets and meeting goals per event; report sourced and influenced pipeline.

3 → 4: Design executive and account-based programmes around open opportunities.

4 → 5: Compare formats against matched cohorts and rebalance the portfolio.

WARNING SIGNS

- Event success reported as scans or registrations
- Sales attends but books no meetings
- Follow-up takes more than a week
- Influenced pipeline is added to other channels' totals
- No list of target accounts before the event

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A data platform runs six executive dinners a year, each for twelve to fifteen leaders from tier 1 accounts with open or planned opportunities. Account executives co-host, each guest has a pre-agreed follow-up, and attending opportunities are tracked against similar non-attending ones. The format earns its budget on velocity, not volume.

EXECUTIVE ASSESSMENT QUESTIONS

1. Which accounts and opportunities is our next major event meant to move?
2. How many meetings did sales book from our last three events?
3. Do we report event-influenced pipeline separately from sourced pipeline?
4. Which event formats have the best cost per opportunity?

06

Content Syndication and Third-Party Lead Acquisition

WHY THIS CAPABILITY MATTERS

Content syndication can extend reach into ICP accounts that would otherwise never engage with owned channels. It is also the channel most prone to economic self-deception: low cost per lead makes it look efficient while it quietly consumes SDR capacity and fills the database with contacts who barely remember downloading anything. Maturity here is about quality governance and honest measurement through to pipeline.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Leads are bought from publishers on volume and lowest CPL, with broad filters. Validation is minimal, leads go straight to sales, and sales quickly stops following them up. TECHNOLOGY Publisher CSV uploads MEASURED BY Lead volume, CPL
Level 2 Repeatable	ICP filters (industry, size, region, job function) and validation rules are agreed in writing. Leads are de-duplicated, enriched and routed into nurture before sales contact. TECHNOLOGY Validation rules; enrichment; MAP nurture MEASURED BY Validated leads, rejection rate
Level 3 Integrated	Programmes target named account lists and use intent overlays. Each publisher is measured through to sales acceptance and pipeline, and poor-quality leads are rejected and credited back. TECHNOLOGY Intent data; account lists; CRM source MEASURED BY Sales acceptance, cost per opportunity tracking
Level 4 Predictive	Syndication fills specific buying-group gaps in priority accounts, for example adding finance and IT roles to accounts where only operations has engaged. Suppliers are managed with quality scorecards. TECHNOLOGY Buying-group gap analysis; supplier MEASURED BY Buying-group coverage gained scorecards
Level 5 Adaptive	Spend is allocated across publishers on cost per opportunity and incremental account progression, and the channel's role is judged as part of the account-engagement mix rather than as a lead source. TECHNOLOGY Account-level incrementality analysis MEASURED BY Incremental account progression

— The economics of cheap leads (illustrative)

The comparison below holds budget constant at £30,000 and assumes ten minutes of SDR time per lead. Programme B pays two and a half times as much per lead but produces more than twice as many opportunities and uses 60% less SDR time.

	Programme A high volume, broad filters	Programme B ICP- and intent-filtered
Leads purchased	1,000	400
Cost per lead	£30	£75
Total cost	£30,000	£30,000
Sales acceptance rate	15%	40%
Sales-accepted leads	150	160
Accepted-to-opportunity rate	6.0%	12.5%
Opportunities	9	20
Cost per opportunity	£3,333	£1,500
SDR hours consumed	167	67

ILLUSTRATIVE Same budget, different economics.

The hidden cost is capacity. SDR hours spent qualifying poor-fit leads are hours not spent on high-intent accounts. Mature teams either set a cap on syndicated volume per SDR or keep syndicated leads in nurture until they show further engagement.

PEOPLE, PROCESS AND OPERATING MODEL

Ownership shifts from a buyer of leads to a manager of suppliers. At Level 3, marketing operations owns validation rules and returns, and SDR leadership agrees acceptance criteria. At Level 4, ABM decides where syndication is deployed, because its main job becomes extending buying-group coverage.

PROGRESSION ROADMAP

1 → 2: Agree written ICP filters and validation rules; route leads to nurture first.

2 → 3: Measure each publisher to sales acceptance and pipeline; enforce credits for rejects.

3 → 4: Use syndication to fill buying-group gaps in priority accounts.

4 → 5: Allocate across publishers on cost per opportunity and incremental progression.

WARNING SIGNS

- CPL is the only metric negotiated with publishers
- Sales acceptance of syndicated leads is below 20%
- No credit-back process for invalid leads
- Syndicated leads go straight to SDRs with no nurture
- Database growth is celebrated without quality checks

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

An HR technology vendor uses syndication only for tier 2 accounts already showing intent. Leads must match one of four buying roles; invalid records are credited within 30 days; and each publisher's scorecard covers acceptance rate, opportunity rate and data accuracy. Two of seven publishers were dropped after one quarter.

EXECUTIVE ASSESSMENT QUESTIONS

1. What is our cost per opportunity from syndication, not per lead?
2. What share of syndicated leads does sales accept?
3. How much SDR time do syndicated leads consume?
4. Is syndication filling buying-group gaps or just adding contacts?

Organic Social Media and Social Selling

WHY THIS CAPABILITY MATTERS

Most B2B buying research happens in places marketers cannot track: private messages, peer communities, podcasts and shared screenshots, often called dark social. Organic social, particularly LinkedIn, is where executives and practitioners form opinions about who understands their problems. It works best through people rather than logos, so maturity depends on how well a company enables its executives, experts and sellers to contribute a consistent, credible point of view.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	The company page posts irregularly, mostly announcements. Executives and employees rarely participate, and success is reported as followers and likes. TECHNOLOGY Native posting MEASURED BY Followers, likes
Level 2 Repeatable	A content calendar exists, executives post occasionally with support, and engagement and follower growth are tracked. Some sellers share company content. TECHNOLOGY Scheduling tools; native analytics MEASURED BY Engagement rate, reach
Level 3 Integrated	An executive and employee advocacy programme runs on clear themes. SDRs and AEs practise social selling with guidance, and the team monitors whether followers and engagers match the ICP. TECHNOLOGY Advocacy platform; Sales Navigator MEASURED BY ICP audience share; social-sourced meetings
Level 4 Predictive	Social engagement from target accounts feeds account scoring and SDR prioritisation. Self-reported attribution ("How did you hear about us?") captures dark-social influence, and social listening informs messaging. TECHNOLOGY Social listening; engagement data into account scoring MEASURED BY Target-account engagement; dark-social mentions
Level 5 Adaptive	A coordinated point-of-view programme builds recognisable thought leadership for a small number of voices. Success is measured through branded search, direct traffic, self-reported attribution and pipeline from target accounts. TECHNOLOGY Branded demand analytics; self-reported attribution in CRM MEASURED BY Branded search lift; influenced pipeline

DEEP DIVE

— Measuring what matters in organic social

- **Audience composition:** what share of followers and engagers match the ICP by function, seniority and industry. A smaller, well-matched audience beats a large, irrelevant one.
- **Qualified engagement:** comments and conversations from target accounts, not total reactions.
- **Branded demand:** trends in branded search volume and direct traffic, which reflect memory built outside trackable channels.
- **Self-reported attribution:** a mandatory free-text field on demo and contact forms. It is imperfect, but it routinely surfaces podcasts, communities and posts that click-based tracking misses.

PEOPLE, PROCESS AND OPERATING MODEL

Founder-led and executive-led content matures from personal habit to a supported programme. At Level 3, a social or communications lead helps three to six named voices develop themes and maintain a cadence, while SDR leadership trains sellers on social selling. At Level 4, social signals flow into the same account intelligence that ABM and SDRs use.

PROGRESSION ROADMAP

1 → 2: Agree themes and a calendar; support one or two executive voices.

2 → 3: Launch an advocacy programme; train sellers; track ICP audience composition.

3 → 4: Feed social engagement into account scoring; add self-reported attribution to forms.

4 → 5: Build a distinctive point of view and measure it through branded demand and pipeline.

WARNING SIGNS

- Followers reported as a success metric
- Only the company page posts
- Executives post generic content written by others
- No self-reported attribution field on forms
- Social activity is not visible to sales

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A payments infrastructure company supports its CFO and two product leaders to publish weekly on reconciliation and payments operations. SDRs engage with comments from target accounts within a day, self-reported attribution names executive posts on 22% of demo requests, and branded search has grown steadily over four quarters.

EXECUTIVE ASSESSMENT QUESTIONS

1. What share of our social audience matches our ICP?
2. Which of our people are credible voices buyers recognise?
3. Do we capture self-reported attribution on our demo forms?
4. Can SDRs see when target accounts engage with our content?

08

Website Strategy, Development, Personalisation and Conversion

WHY THIS CAPABILITY MATTERS

The website is the one place every channel sends buyers, and the place where buyers who never fill in a form still reveal what they care about. It has quietly become the most important sales asset most B2B companies own, yet in many organisations it is still governed as a brand project, refreshed every few years and measured in sessions. A mature website behaves like a revenue engagement platform: it recognises segments and accounts where it lawfully can, adapts what it shows, converts intent into conversations, and tells sales which accounts are warming up.

Maturity here is not defined by owning a personalisation tool. Many Level 3 gains (clear conversion paths, industry pages, fast routing to a meeting) need nothing more than a well-configured CMS, forms and CRM. Tools matter when the team has the content, data and operating discipline to use them.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Digital brochure. Static pages written from the company's point of view, generic messaging for all visitors, a single contact form and a newsletter sign-up. Reporting covers sessions, bounce rate and top pages, with little connection to the CRM. TECHNOLOGY CMS; GA4 basics MEASURED BY Sessions, bounce rate
Level 2 Repeatable	Conversion foundations. Defined conversion journeys (demo, trial, contact, content), role-specific landing pages, SEO foundations, conversion rate optimisation basics, forms integrated with the MAP and CRM, lead source tracking and basic chat. TECHNOLOGY CMS templates; forms to MAP/CRM; SEO MEASURED BY Conversion rate by path; form completion tools; basic chat
Level 3 Integrated	Integrated experiences. Industry, persona and campaign-linked landing pages; visitor segmentation and behavioural analytics; structured A/B testing; chat and meeting-booking journeys; form enrichment and routing; content recommendations; and conversion reporting through to pipeline. TECHNOLOGY Testing tools; enrichment; scheduling; behavioural analytics MEASURED BY Pipeline from website; conversion by segment
Level 4 Predictive	Personalised and intelligent. Dynamic personalisation by firmographics, account tier and intent; personalised CTAs and landing pages; account-aware chat that routes known accounts to their owner; engagement scoring; AI-assisted testing; and sales alerts when target accounts show meaningful engagement. TECHNOLOGY Personalisation (e.g. Mutiny, Optimizely, Adobe Target); account ID; conversational tools (e.g. Qualified) MEASURED BY Target-account engagement; personalised vs control lift
Level 5 Adaptive	Orchestrated revenue platform. 1:few and 1:1 experiences for priority accounts, coordinated with paid media, email and sales; AI-powered conversational journeys; next-best-action routing; product and customer signals integrated; and optimisation on pipeline per visit rather than conversion rate alone, all within governed consent. TECHNOLOGY Orchestration across ABM platform, CDP or warehouse and CRM MEASURED BY Pipeline per visit; account progression; incremental lift

Website maturity architecture

The architecture below separates the website into five functional layers. Each layer matures somewhat independently; the most common failure is investing in the personalisation layer before the identification, conversion and measurement layers can support it.

	Levels 1–2 · Foundations	Level 3 · Integrated	Levels 4–5 · Advanced
Experience & content	Generic pages; single form	Industry, persona and campaign pages; content recommendations	Dynamic 1:few and 1:1 experiences; AI-assembled modules
Identification & segmentation	Anonymous traffic; UTM source	Form enrichment; behavioural segments; ICP flags	Account identification (consented), intent and engagement scoring
Decisioning & personalisation	None	Rules by segment and campaign; A/B tests	Real-time decisioning by account tier, stage and intent; AI-assisted testing
Conversion & routing	Contact form to inbox	Meeting booking; chat; lead routing to owner	Account-aware chat; next-best-action routing; sales alerts with context
Measurement & feedback	Sessions and top pages	Conversion by path; pipeline from web	Pipeline per visit; controlled lift; account journey reporting

Website maturity architecture: five functional layers, each maturing in step.

What the platforms actually do

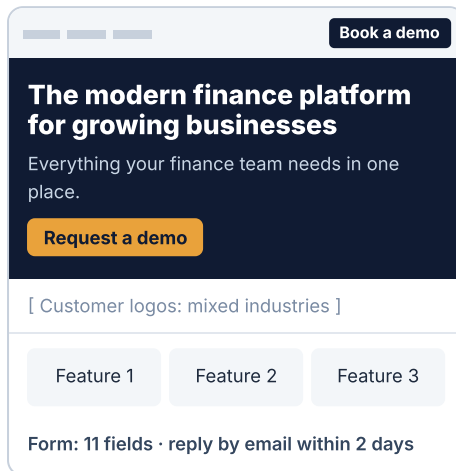
The tools below are examples, not prerequisites. Most organisations reach Level 3 with their existing CMS, MAP and CRM.

Capability	Typical role and examples
Content management and testing	CMS (HubSpot CMS, Adobe Experience Manager, Webflow, WordPress) for pages and templates; Optimizely or Adobe Target for experimentation and server-side tests.
Personalisation	Mutiny and Intellimize (now part of Webflow) specialise in B2B segment and account personalisation; HubSpot smart content covers simpler rules; Adobe and Optimizely cover enterprise use.
Account identification and intent	Demandbase and 6sense identify companies from network data and combine this with intent signals; HubSpot and others offer company-level identification. Accuracy varies widely by audience and working pattern.
Conversational and routing	Qualified, Drift (now part of Salesloft) and HubSpot chat route visitors to the right person; scheduling tools (e.g. Chili Piper) turn form fills into booked meetings.
Analytics	GA4 for behaviour and conversion events; product analytics for trial journeys; BI or warehouse for joining web data to pipeline.

— From generic to personalised: one landing page, two experiences

The illustration below shows a generic landing page and the same page shown to a visitor identified as belonging to a tier 1 payments operator that is researching reconciliation. The personalised version changes the headline, proof points, CTA and routing, while keeping the same template.

GENERIC



Book a demo

The modern finance platform for growing businesses

Everything your finance team needs in one place.

Request a demo

[Customer logos: mixed industries]

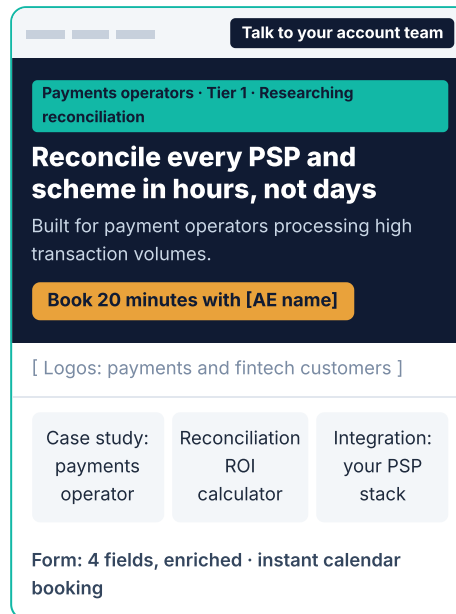
Feature 1

Feature 2

Feature 3

Form: 11 fields · reply by email within 2 days

PERSONALISED



Talk to your account team

Payments operators · Tier 1 · Researching reconciliation

Reconcile every PSP and scheme in hours, not days

Built for payment operators processing high transaction volumes.

Book 20 minutes with [AE name]

[Logos: payments and fintech customers]

Case study: payments operator

Reconciliation ROI calculator

Integration: your PSP stack

Form: 4 fields, enriched · instant calendar booking

- **Headline** names the visitor's problem, not the vendor's category.
- **Proof** comes from the same industry.
- **CTA** routes a known account to its owner.
- **Form** is shortened by enrichment and books a meeting instantly.
- **Template** stays the same, so the variant is cheap to run.

ILLUSTRATIVE Before and after: a generic landing page and its personalised variant for a target segment.

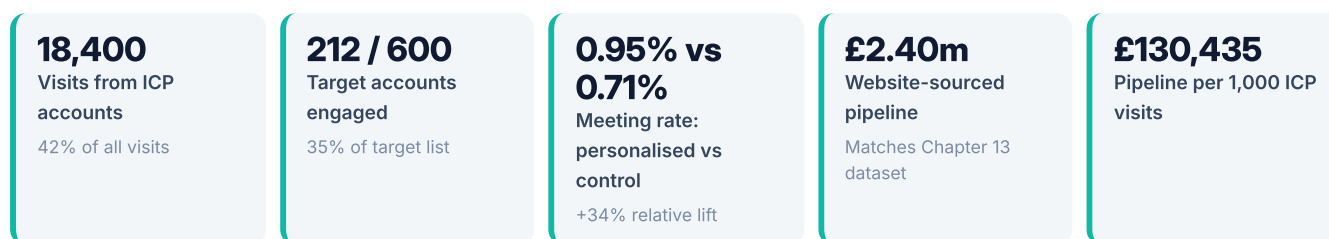
— A sample account-personalised journey



ILLUSTRATIVE A sample account-personalised website journey.

— A website measurement dashboard (illustrative)

Mature website reporting shifts from counting visitors to understanding visitor quality, conversion, account engagement and pipeline influence.



Segment	ICP visits	Meetings	Visit-to-meeting	Sourced pipeline
Payments operators	7,200	62	0.86%	£1.20m
Retail fintech	6,100	41	0.67%	£0.70m
Other ICP	5,100	27	0.53%	£0.50m
Total	18,400	130	0.71%	£2.40m

ILLUSTRATIVE Website measurement dashboard for one quarter.

Consent, UK GDPR, PECR and the limits of identification

Two regimes apply to most website intelligence in the UK. **UK GDPR** governs the processing of personal data, including data about named business contacts, and requires a lawful basis (often legitimate interests for B2B marketing, supported by a documented assessment). **PECR** regulation 6 governs storing or accessing information on a user's device, such as cookies and pixels.

The Data (Use and Access) Act 2025 amended regulation 6, and from 5 February 2026 cookies used solely for statistical analytics to improve a site, and cookies that enhance functionality or appearance, can be exempt from consent, provided users receive clear information and a simple, free way to object. ^[6] Advertising, cross-site tracking and most personalisation and identification cookies still require prior consent.

Company-level identification from network data identifies organisations, not people, but remote working, VPNs and shared networks make match rates incomplete and sometimes wrong. Treat identified-account data as a probabilistic signal, never as proof that a specific person visited, and avoid presenting it to sales as such. Where identification relies on cookies or links to individuals, consent and transparency obligations apply. This is a summary of established practice, not legal advice; confirm your approach with your data protection lead.

— Implementation roadmap

Phase	Priorities	Prerequisite
Weeks 1-6	Audit conversion paths; fix tracking and form-to-CRM flows; define conversion events; add a meeting-booking path to demo forms.	Agreed lifecycle and source definitions
Weeks 7-12	Build industry and persona pages for the top two segments; set up an A/B testing cadence; add enrichment and routing.	Messaging by segment from product marketing
Months 4-6	Pilot segment personalisation on the homepage and two landing pages for tier 1 and 2 accounts, with a control group; alert account owners to target-account engagement.	Consent model reviewed; account tiers in CRM

Months 7–12	Extend to 1: few experiences for priority clusters; coordinate with paid and email; report pipeline per visit and incremental lift.	Warehouse or CRM join of web and pipeline data
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PEOPLE, PROCESS AND OPERATING MODEL

The website matures from a brand or IT asset into a shared revenue asset. At Level 3, a web or digital lead with conversion and analytics skills sits within demand generation and runs a test roadmap. At Level 4, personalisation is planned jointly with ABM and product marketing, because each segment experience needs messaging, proof and offers. Developers, data protection and RevOps are standing partners, not occasional approvers.

PROGRESSION ROADMAP

1 → 2: Define conversion journeys, connect forms to CRM, and fix analytics events.

2 → 3: Build segment pages, add routing and booking, and run structured tests.

3 → 4: Pilot account and intent-based personalisation with controls and sales alerts.

4 → 5: Orchestrate experiences across channels and optimise on pipeline per visit.

WARNING SIGNS

- Website reported on sessions and bounce rate
- Demo requests wait hours or days for a reply
- Personalisation tool bought before segment messaging exists
- Identified-account data presented to sales as fact
- No control group, so personalisation lift is assumed

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A B2B payments platform tailors its homepage and four landing pages for three industry clusters and its 150 tier 1 accounts. Known accounts that request a demo are routed straight to their account executive's calendar. A permanent 10% control group shows personalised visitors convert to meetings at a higher rate, and the team reviews pipeline per visit by segment monthly.

EXECUTIVE ASSESSMENT QUESTIONS

1. What share of our pipeline starts or is influenced on the website?
2. How long does a high-intent visitor wait to speak to someone?
3. Do our personalisation results come from controlled tests?
4. Is our cookie and identification approach reviewed against current PECR and UK GDPR?

09

Account-Based Marketing and Account Orchestration

WHY THIS CAPABILITY MATTERS

Account-based marketing exists because B2B revenue is concentrated: a minority of accounts produce most of the value, and they buy as groups. Gartner and Forrester research both show buying groups that are large and cross-functional, with Forrester finding an average of 13 people involved.^[1] Lead-based models struggle with this reality, because they reward the first person to fill in a form rather than progress across the group that decides.

ABM maturity is not the number of accounts on a list or the sophistication of the ABM platform. It is the degree to which marketing and sales share a single plan for the accounts that matter, act on signals in time, and measure success in account progression and revenue.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive

A target account list exists, often produced once by sales leadership. Campaigns are generic and occasionally targeted at the list. Success is reported as account reach or impressions, and sales sees little difference.

TECHNOLOGY CRM list; LinkedIn matched audiences

MEASURED BY Accounts reached, impressions

Level 2 Repeatable

Accounts are tiered by fit and potential. 1:many programmes run targeted ads and email to tiers 2 and 3. Engagement is still tracked mostly at contact level, and account plans exist for a few strategic accounts.

TECHNOLOGY Tiering in CRM; ABM advertising

MEASURED BY Engaged accounts, contact engagement

Level 3 Integrated

1:many and 1:few motions run with shared sales and marketing account plans. Buying groups are mapped for priority accounts, marketing-qualified accounts (MQAs) trigger agreed sales actions, and account pipeline is reported.

TECHNOLOGY Account engagement scoring; buying-group mapping

MEASURED BY MQAs, meetings, account pipeline

Level 4 Predictive

Intent data, technographics and engagement scoring identify in-market accounts and buying-group gaps. Account journey stages are defined and measured, plays are triggered automatically, and AI supports account research and personalisation at scale.

TECHNOLOGY Intent and ABM platforms (e.g. Demandbase, 6sense); AI research; signal tools (e.g. Clay)

MEASURED BY Journey progression, buying-group coverage, velocity

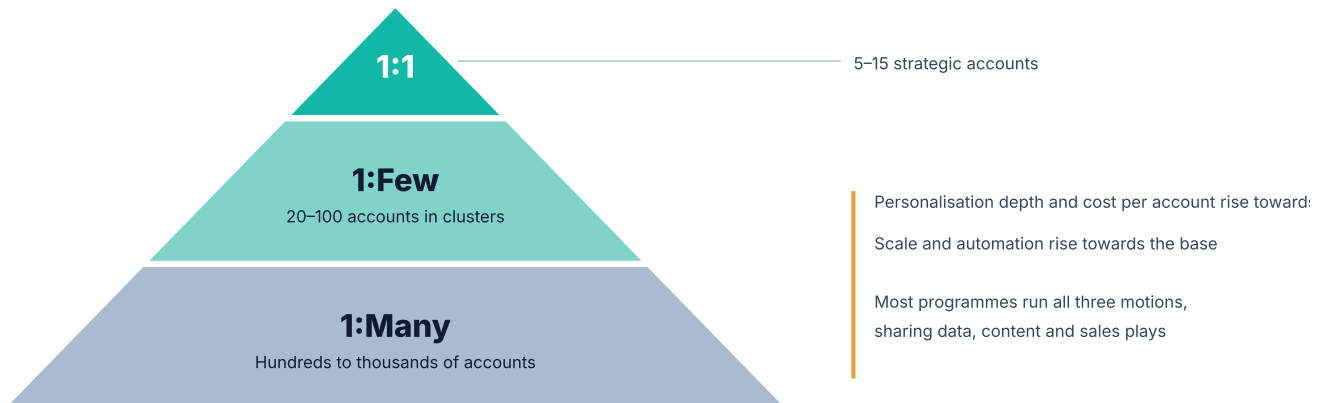
Level 5 Adaptive

1:1, 1:few and 1:many motions are managed as one portfolio. Investment follows target-account revenue, win rate, deal size, velocity and expansion, and the account selection model is refreshed continuously from outcomes.

TECHNOLOGY Account-level revenue analytics; continuous selection models

MEASURED BY Target-account revenue, win rate, expansion

Three ABM motions



The ABM maturity pyramid: 1:Many, 1:Few and 1:1 (indicative account ranges).

	1:Many	1:Few	1:1
Use when	Many accounts share a profile; ACV supports moderate personalisation	Clusters share an industry, trigger or challenge	A small number of accounts justify bespoke investment
Resources	Programme manager, ops, media; low cost per account	ABM manager per 3-5 clusters; content by cluster	Senior ABM lead per 3-8 accounts; executive time
Selection	Fit model plus intent; refreshed quarterly	Shared trigger (e.g. ERP replacement, regulation, M&A)	Strategic value, relationship and whitespace analysis
Personalisation	Industry and role messaging; dynamic fields	Cluster-specific narrative, proof and offers	Account-specific insight, business case and experiences
Channels	Programmatic and LinkedIn ads, email, web personalisation	Adds roundtables, content hubs, SDR plays	Adds executive engagement, workshops, direct mail
Sales role	Acts on MQA alerts within SLA	Co-owns cluster plan; runs coordinated outreach	Co-leads the account plan with marketing
Measured by	Engaged accounts, MQAs, opportunity rate	Cluster pipeline, velocity, buying-group coverage	Account revenue, deal size, relationship breadth

Account ranges in the pyramid are indicative of common practice, not benchmarks.

The capability progression

ABM maturity builds in a fairly predictable order. Each capability below depends on the ones before it:

1. **ICP definition and tiering** agreed with sales, using fit, potential and relationship data.
2. **Account enrichment** with firmographic and technographic signals (systems in use, growth, funding, hiring).
3. **Buying-group identification and stakeholder mapping** by role: economic buyer, champion, technical evaluator, user, procurement.
4. **Intent and trigger signals** (topic research, job changes, ERP replacement, M&A, regulatory deadlines) translated into defined plays.
5. **Account engagement scoring and journey stages**, for example unaware, aware, engaged, MQA, opportunity, customer.
6. **Orchestrated plays** combining ads, personalised pages and content hubs, email, SDR outreach, events and, for 1:1, direct mail and executive engagement.

7. **Shared account plans and deal acceleration** for open opportunities.

8. **Account-based revenue analytics** comparing target and non-target accounts on win rate, deal size and velocity.

AI now accelerates steps 2, 3 and 6 in particular: summarising annual reports and news into account briefs, drafting role-specific messaging for review, and turning trigger signals into suggested actions for SDRs. The quality control remains human.

— ABM measurement framework

ABM KPIs fall into four tiers. Low-maturity programmes report the first tier only; mature programmes report all four and weight decisions towards the last two.

Coverage	Engagement	Progression	Revenue
Introduced at Level 2+	Introduced at Level 2–3	Introduced at Level 3–4	Introduced at Level 4–5
• Target account coverage • Buying-group coverage • Contact acquisition • Stakeholder seniority	• Engagement breadth (roles) • Engagement depth • Intent strength • Account penetration	• Marketing-qualified accounts • Sales-qualified accounts • Meetings generated • Opportunities generated • Account opportunity conversion • Account progression by stage	• Pipeline sourced and influenced • Account win rate • Deal velocity • Average contract value • Revenue from target accounts • Account expansion

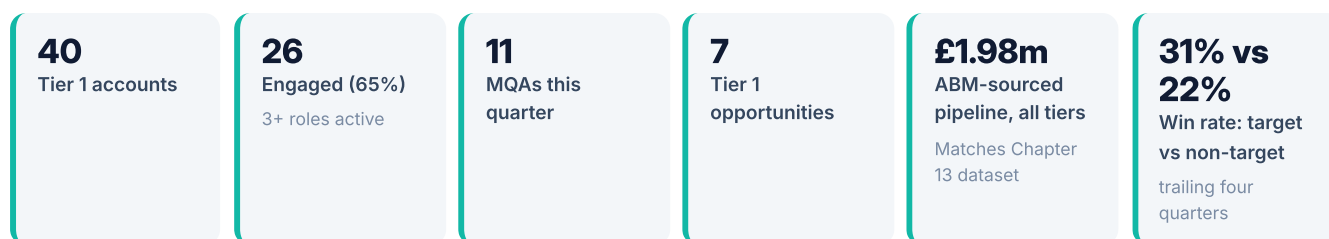
Closer to commercial value →

The ABM measurement framework: four tiers of KPIs.

— Engagement is not progression

The most common ABM failure is declaring success on engagement. An account that views ads and visits a blog post has engaged; it has not progressed. Three tests separate the two: **breadth** (are several buying-group roles involved, including a senior one?), **intent quality** (is the activity on evaluation-stage content such as pricing, integration or case studies?), and **sales confirmation** (has a conversation occurred and been accepted as an opportunity?). Only the third counts as commercial progression; the first two predict it.

Account engagement and buying-group dashboard (illustrative)



Account	Tier	Buying group engaged	Score	Top intent topic	Stage	Next action
Account A · payments	1	7/9	84	Reconciliation	Opportunity	Exec roundtable invite
Account B · retail bank	1	5/9	71	Regulatory reporting	MQA	SDR play within 48h
Account C · marketplace	1	3/9	58	ERP replacement	Engaged	Add finance roles via syndication
Account D · insurer	2	4/8	52	Close automation	Engaged	Personalised content hub
Account E · lender	2	2/8	33	None detected	Aware	Keep in 1:many
Account F · PSP	1	6/9	77	Pricing, security	Opportunity	Deal acceleration: ROI workshop

ILLUSTRATIVE Account engagement and buying-group dashboard (fictional accounts).

Worked example: from unknown to customer (illustrative)

Week 0	● UNAWARE	Added to tier 1 list: fit model ranks it in the top 5% of the ICP.	Fit score 92
Week 3	● AWARE	Intent surge on reconciliation topics; ads reach six buying-group roles.	Intent: high
Week 5	● ENGAGED	Finance and operations leads visit solution and integration pages.	3 roles engaged
Week 6	● MQA	Head of Finance attends an executive roundtable; score passes the MQA threshold.	Score 71
Week 8	● MEETING	SDR play within 48 hours; discovery meeting accepted by the AE.	SAA
Week 10	● OPPORTUNITY	Opportunity created; a personalised content hub supports the buying group.	£120k pipeline
Week 22	● CUSTOMER	Closed-won after an ROI workshop; expansion plan agreed for month 9.	£110k ACV

Buying group: 9 roles mapped, 7 identified, 5 engaged before opportunity creation. Time from first signal to close: 19 weeks.

ILLUSTRATIVE Worked example: one account's progression from unknown to customer.

PEOPLE, PROCESS AND OPERATING MODEL

ABM matures from a marketing programme to a joint operating model. At Level 3, each tier 1 account or 1:few cluster has a named marketing and sales owner and a monthly account review. At Level 4, SDRs work from account signals rather than lead lists, and ABM, paid media and web teams plan plays together. At Level 5, account selection, investment and results are reviewed with sales leadership as part of the revenue operating rhythm.

PROGRESSION ROADMAP

1 → 2: Tier accounts with sales using a documented fit model; launch a 1:many pilot.	2 → 3: Map buying groups, define MQAs with sales actions, and build shared plans for priority accounts.	3 → 4: Add intent and trigger signals, journey stages and automated plays; measure velocity.	4 → 5: Manage the three motions as one portfolio, judged on target-account revenue.
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WARNING SIGNS

- Target list unchanged for more than a year
- Success reported as impressions or engaged accounts only
- MQAs are created but sales has no agreed action
- One contact per account in most target accounts
- No comparison between target and non-target win rates

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

An enterprise finance software provider runs 1:1 programmes for 12 accounts, 1:few clusters for 80 accounts sharing an ERP-replacement trigger, and 1:many for 1,500 tier 3 accounts. Every MQA triggers a defined SDR play within 48 hours. Target accounts are compared each quarter with non-target accounts on win rate, deal size and cycle length, and the account list is refreshed from those results.

EXECUTIVE ASSESSMENT QUESTIONS

1. Do our target accounts win more often, buy more and close faster than other accounts?
2. How many buying-group roles are engaged in our tier 1 accounts?
3. What exactly does sales do when an account becomes an MQA, and how quickly?
4. Which signals reliably predict an account entering a buying cycle?

10

Marketing Measurement, Reporting, Attribution and Revenue Analytics

WHY THIS CAPABILITY MATTERS

Measurement decides what a marketing function learns, what it is funded for and what it is trusted with. A team that reports activity is managed as a cost centre. A team that reports pipeline and revenue is managed as an investment. A team that can show which spending actually caused growth is given the budget. This is why measurement maturity often caps maturity in every other dimension: personalisation, ABM and AI cannot be justified, or improved, without it.

Two cautions apply throughout this chapter. Attribution describes which touches were associated with outcomes; it does not prove that they caused them. And every figure in the worked examples is illustrative, derived from a single internally consistent dataset so that the calculations can be checked.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1
Reactive

Activity and awareness. Impressions, clicks, CTR, website traffic, email opens and clicks, social engagement, webinar registrations and raw lead volume, each reported from its own platform. These metrics show effort, not effect, and cannot be compared across channels.

TECHNOLOGY Ad platforms; GA4; spreadsheets

MEASURED BY Clicks, opens, traffic

Level 2
Repeatable

Lead and funnel measurement. Leads, MQLs, lead quality, CPL, lead-to-MQL and MQL-to-SQL conversion, sales acceptance, funnel leakage and channel-level conversion. Useful for operational control, but it rewards volume and the first person to convert, and says little about buying groups.

TECHNOLOGY MAP reporting; CRM lead reports

MEASURED BY MQLs, CPL, conversion rates

Level 3
Integrated

Pipeline and revenue measurement. Opportunity creation, sourced and influenced pipeline, pipeline conversion, marketing-sourced revenue, cost per opportunity, campaign ROI, funnel velocity and cohort analysis, all from CRM-connected, closed-loop reporting.

TECHNOLOGY CRM opportunity reporting; campaign influence; UTM governance

MEASURED BY Sourced pipeline, cost per opportunity, ROI

Level 4
Predictive

Advanced revenue intelligence. Multi-touch and account-based attribution, channel contribution, pipeline velocity, stage conversion, pipeline coverage, forecasting, CAC by segment, LTV:CAC, CAC payback, cohort performance and marketing investment forecasting.

TECHNOLOGY Attribution tools; BI (Power BI, Looker); data warehouse

MEASURED BY CAC, payback, LTV:CAC, velocity, coverage

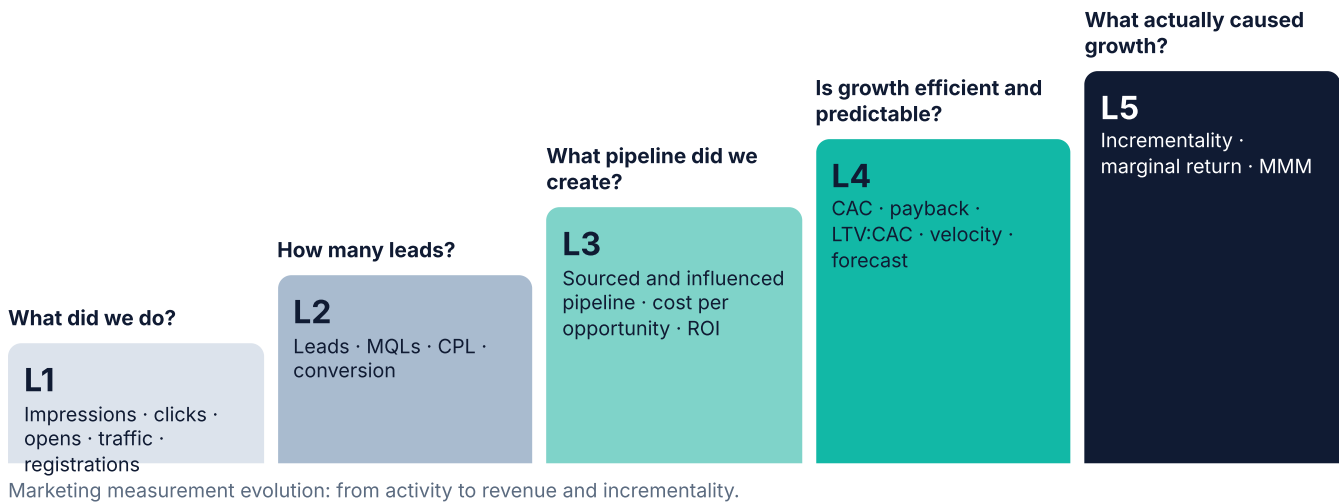
Level 5
Adaptive

Incrementality and predictive optimisation. Holdout experiments, causal inference, marketing mix modelling where data volume allows, predictive revenue models, marginal return on spend and scenario modelling, with budgets moved on validated business impact.

TECHNOLOGY Experiment frameworks; MMM (e.g. Google Meridian); forecasting models

MEASURED BY Incremental return, marginal ROI

The measurement ladder: five questions



An illustrative B2B SaaS quarter

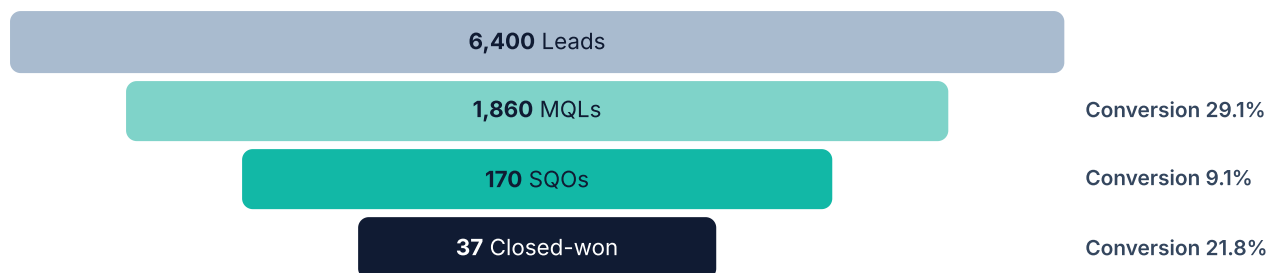
The dataset below describes one quarter for a fictional mid-market SaaS company with a £60k average first-year contract value and a 120-day sales cycle. All derived figures in this chapter are calculated from it.

Channel	Spend	Leads	MQLs	SQOs	Sourced pipeline	CPL	Cost per SQO	Pipeline per £
Paid search	£150,000	1,500	450	45	£2.70m	£100	£3,333	18.0x
LinkedIn Ads	£120,000	900	270	24	£1.44m	£133	£5,000	12.0x
Content syndication	£60,000	2,000	300	9	£0.54m	£30	£6,667	9.0x
Webinars & events	£110,000	800	320	30	£1.80m	£138	£3,667	16.4x
Organic & website	£60,000	1,000	400	40	£2.40m	£60	£1,500	40.0x
ABM programme	£100,000	200	120	22	£1.98m	£500	£4,545	19.8x
Total	£600,000	6,400	1,860	170	£10.86m	£93.75	£3,529	18.1x

ILLUSTRATIVE Illustrative quarterly performance dataset (SQO = sales-qualified opportunity).

Read across the rows and three lessons appear. Organic and website activity has the lowest cost per opportunity because its spend excludes the long-term investment in content and brand that made it possible, which is a reminder that efficiency metrics need context. Content syndication has the lowest CPL and the highest cost per opportunity. The ABM programme has a high CPL but strong pipeline per pound, because its opportunities are larger.

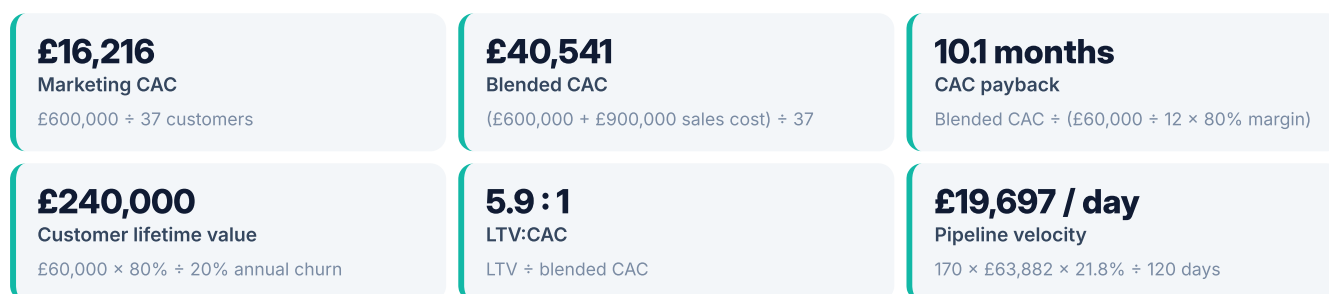
— Funnel conversion



Lead to closed-won: 0.58%. Closed-won is a cohort view: deals that closed from this quarter's SQOs over the following sales cycle.

ILLUSTRATIVE Funnel conversion for the illustrative quarter.

— Unit economics from the same quarter



ILLUSTRATIVE Unit economics derived from the illustrative quarter.

KPI dictionary

KPI	Definition	Calculation	Example (illustrative quarter)
Cost per lead (CPL)	Spend per new lead	$\text{Spend} \div \text{leads}$	$\text{£}600,000 \div 6,400 = \text{£}93.75$
Lead-to-MQL rate	Share of leads meeting the MQL definition	$\text{MQLs} \div \text{leads}$	$1,860 \div 6,400 = 29.1\%$
MQL-to-SQO rate	Share of MQLs becoming sales-qualified opportunities	$\text{SQOs} \div \text{MQLs}$	$170 \div 1,860 = 9.1\%$
Cost per opportunity	Marketing spend per sourced SQO	$\text{Spend} \div \text{sourced SQOs}$	$\text{£}600,000 \div 170 = \text{£}3,529$
Sourced pipeline	Value of opportunities whose source is marketing under the agreed rule	Sum of sourced opportunity values	£10.86m
Sourced share	Marketing-sourced share of all new pipeline	$\text{Sourced} \div \text{total new pipeline}$	$\text{£}10.86\text{m} \div \text{£}24.0\text{m} = 45.2\%$
Influenced share	Share of new pipeline with at least one marketing touch	$\text{Influenced} \div \text{total new pipeline}$	$\text{£}18.4\text{m} \div \text{£}24.0\text{m} = 76.7\%$
Pipeline per £ (pipeline ROI)	Sourced pipeline generated per pound spent	$\text{Sourced pipeline} \div \text{spend}$	$\text{£}10.86\text{m} \div \text{£}600,000 = 18.1\text{x}$
Win rate	Share of SQOs closed-won (cohort)	$\text{Won} \div \text{SQOs}$	$37 \div 170 = 21.8\%$
Average opportunity value	Mean value of sourced SQOs	$\text{Sourced pipeline} \div \text{SQOs}$	$\text{£}10.86\text{m} \div 170 = \text{£}63,882$
Pipeline velocity	Revenue the pipeline produces per day	$\text{SQOs} \times \text{avg value} \times \text{win rate} \div \text{cycle days}$	£19,697 per day
Pipeline coverage	Open qualified pipeline relative to the bookings target	$\text{Pipeline} \div \text{bookings target}$	$\text{£}24.0\text{m} \div \text{£}6.0\text{m} = 4.0\text{x}$
Marketing CAC	Marketing cost per new customer	$\text{Marketing spend} \div \text{new customers}$	£16,216
Blended CAC	Sales and marketing cost per new customer	$(\text{Marketing} + \text{sales cost}) \div \text{new customers}$	£40,541
CAC payback	Months of gross margin to recover CAC	$\text{CAC} \div \text{monthly gross margin per customer}$	10.1 months
LTV:CAC	Lifetime gross margin per pound of acquisition cost	$\text{LTV} \div \text{blended CAC}$	5.9 : 1
Incremental lift	Outcome difference caused by exposure	$(\text{Exposed} - \text{holdout}) \div \text{holdout}$	$(38 - 30) \div 30 = 26.7\%$
Marginal cost per opportunity	Cost of the next opportunity at higher spend	$\Delta \text{ spend} \div \Delta \text{ opportunities}$	$\text{£}50,000 \div 5 = \text{£}10,000$

ILLUSTRATIVE KPI dictionary. Examples use the illustrative dataset; coverage assumes a £6.0m quarterly bookings target.

— Preventing double-counting

The single most damaging reporting error is adding influenced pipeline across channels. In the illustrative quarter, marketing touched £18.4m of the £24.0m new pipeline. But because the typical opportunity is touched by several channels, the sum of each channel's influenced figure would be far larger than the total pipeline that exists.

Opportunity	Value	Source (one only)	Paid search	LinkedIn	Webinar	Email
Opportunity 1	£100,000	Paid search	●	●	●	
Opportunity 2	£120,000	Webinar		●	●	●
Opportunity 3	£80,000	LinkedIn	●	●		
Sourced by channel	£300,000	sums to total ✓	£100k	£80k	£120k	£0k
Influenced by channel	£820,000	2.7× the real total ×	£180k	£300k	£220k	£120k

ILLUSTRATIVE How summing influenced pipeline across channels inflates the total.

- **Sourced is exclusive.** Each opportunity has exactly one source under a documented rule (for example, the first qualifying touch in the 90 days before creation). Sourced figures sum to the total.
- **Influenced is overlapping.** Report it as a share of total pipeline (here 76.7%) and per channel, but never sum it across channels or add it to sourced.
- **Attribution is a model.** Multi-touch models redistribute credit; they do not create pipeline. State which model a figure uses.

— Common attribution mistakes

1. Treating platform-reported conversions as additive across platforms (each claims the same buyer).
2. Changing the source rule mid-year, which makes trends meaningless.
3. Ignoring opportunities with no marketing touch, which hides the denominator.
4. Crediting the contact who filled in a form, not the account and buying group.
5. Reading attribution as causation; a touch on a deal that would have closed anyway is not impact.
6. Measuring channels on different windows, so long-cycle channels look worse than they are.

— From attribution to incrementality

Attribution tells you where credit lands; incrementality tells you what would not have happened without the spend. The illustrative holdout below splits 2,000 matched target accounts evenly, exposing one half to LinkedIn advertising for 90 days.

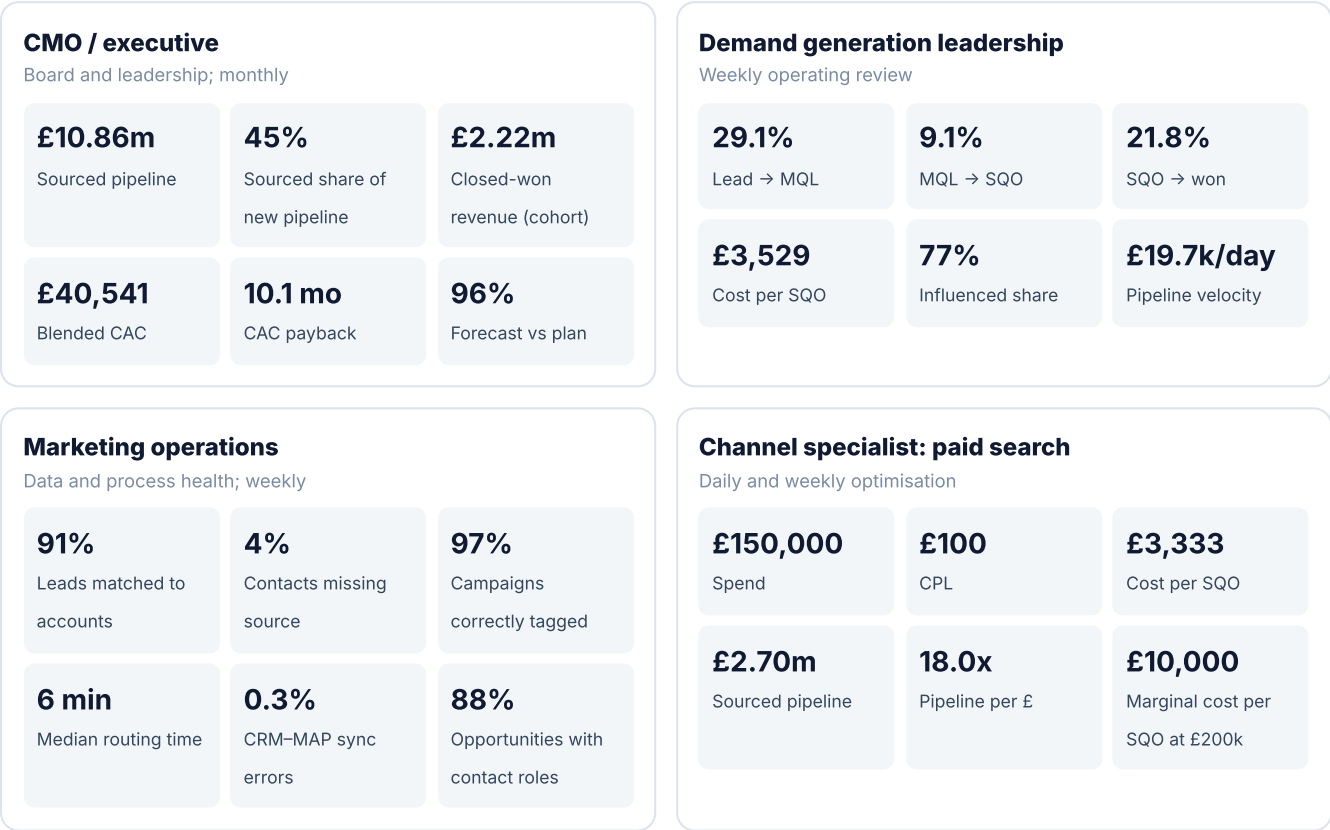


ILLUSTRATIVE Holdout test: opportunities created over 90 days by matched account groups.

Holdout and geographic tests, and Bayesian marketing mix models such as Google's open-source Meridian (made generally available in January 2025),^[7] are how Level 5 teams calibrate attribution. MMM needs several years of consistent spend and outcome data and is most useful for larger budgets; for smaller teams, regular holdout tests on the largest channels provide most of the value.

Four dashboards, four audiences

Different audiences need different views of the same truth. The four illustrative dashboards below are all built from the quarter above.

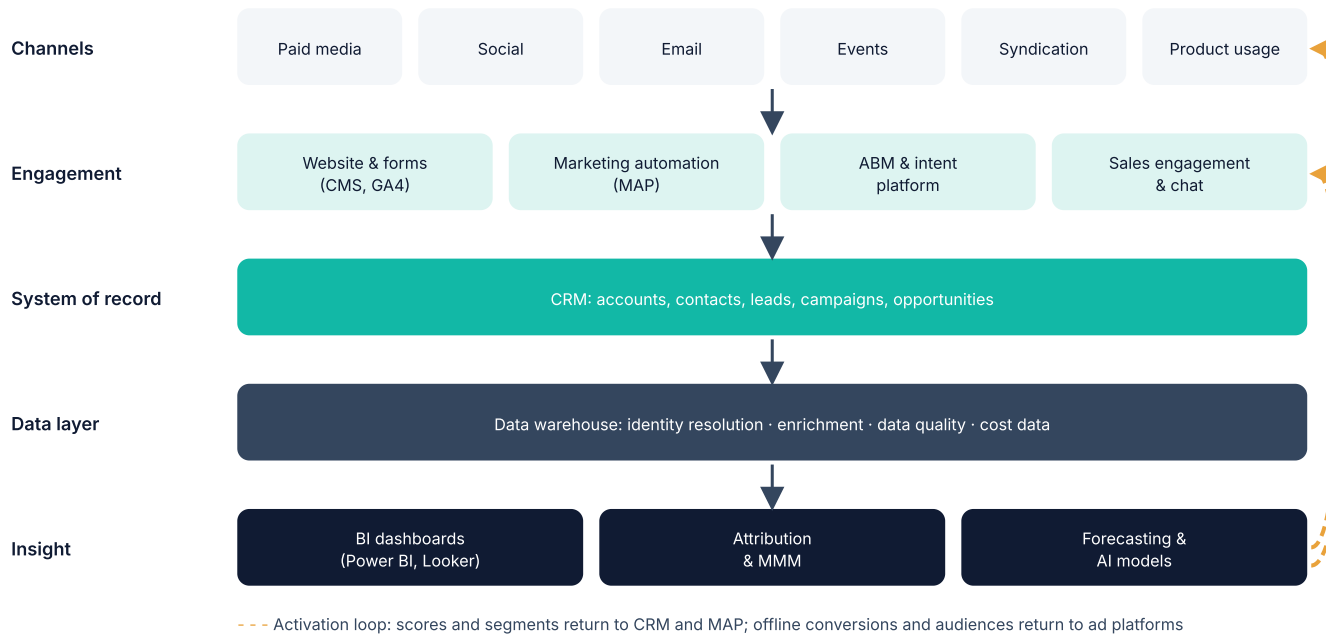


ILLUSTRATIVE Four dashboards for four audiences. Operations figures and forecast attainment are illustrative additions.

How the measurement stack evolves

Level	Core stack	What it enables
1 Reactive	Ad platform dashboards, GA4, spreadsheets	Activity views per channel
2 Repeatable	MAP reporting, CRM lead reports, campaign taxonomy and UTM rules	Lead funnel and CPL by channel
3 Integrated	Salesforce or HubSpot campaign influence, opportunity contact roles, closed-loop sync	Sourced and influenced pipeline; cost per opportunity
4 Predictive	Attribution tools, account intelligence platforms, data warehouse, BI (Power BI, Looker)	Account-level attribution, CAC by segment, forecasting
5 Adaptive	Experiment frameworks, MMM, CDP where justified, AI forecasting	Incremental and marginal return; scenario planning

Marketing and revenue data architecture



Marketing technology and revenue data architecture.

Reporting maturity scorecard

Score each statement 0 (no), 1 (partly) or 2 (yes). A total below 8 indicates Level 1–2 reporting; 8–14 indicates Level 3; 15 and above indicates Level 4 or higher.

#	Statement	No	Partly	Yes
1	Marketing, sales and finance use one documented set of funnel and source definitions	☐ 0	☐ 1	☐ 2
2	Every opportunity has exactly one recorded source, captured automatically	☐ 0	☐ 1	☐ 2
3	Campaign naming and UTM rules are enforced and audited monthly	☐ 0	☐ 1	☐ 2
4	Leads and contacts are matched to accounts, with opportunity contact roles maintained	☐ 0	☐ 1	☐ 2
5	Sourced and influenced pipeline are reported separately and never summed	☐ 0	☐ 1	☐ 2
6	Cost data is joined to pipeline so cost per opportunity is reported by channel	☐ 0	☐ 1	☐ 2
7	CAC and payback are reported by segment at least quarterly	☐ 0	☐ 1	☐ 2
8	A pipeline forecast is produced and compared with actuals	☐ 0	☐ 1	☐ 2
9	At least one incrementality test has informed a budget decision in the last year	☐ 0	☐ 1	☐ 2
10	Dashboards are trusted enough that leaders stop asking for spreadsheet versions	☐ 0	☐ 1	☐ 2

Marketing reporting maturity scorecard (maximum 20).

A 90-day plan to improve reporting maturity

Days	Actions	Output
1–30	Agree lifecycle, source and opportunity definitions with sales and finance; audit UTMs, campaign hierarchy and contact roles; baseline current metrics.	Signed-off definitions; data-gap log

31-60	Fix source capture and campaign association; build sourced and influenced pipeline reports; publish the demand generation dashboard.	Trusted pipeline reporting by channel
61-90	Add cost data for cost per opportunity and pipeline ROI; launch the CMO dashboard; design the first holdout test on the largest channel.	Monthly QBR pack; test plan

PEOPLE, PROCESS AND OPERATING MODEL

Measurement matures when ownership is explicit. At Level 3, marketing operations owns definitions and data quality jointly with RevOps, and finance signs off cost data. At Level 4, an analyst or analytics function produces forecasts and segment economics, and the demand leader presents a monthly or quarterly business review. At Level 5, experimentation is planned like any other programme, with a backlog, a budget and agreed decision rules.

PROGRESSION ROADMAP

1 → 2: Define leads, MQLs and SQLs with sales; build a single funnel report.

2 → 3: Close the loop to opportunities; separate sourced from influenced; add cost per opportunity.

3 → 4: Move data into a warehouse and BI; add CAC, payback and forecasting by segment.

4 → 5: Run holdout tests and, where data allows, mix modelling to steer budget.

WARNING SIGNS

- Marketing and sales report different pipeline numbers
- Influenced pipeline is summed across channels
- The source rule changes without notice
- Finance does not recognise marketing's ROI figures
- No experiment has ever been run on a major channel

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A scale-up's CMO presents a quarterly pack that finance co-signs: sourced pipeline by segment and channel, cost per opportunity, CAC and payback by segment, a forecast against plan, and the result of one incrementality test. When the test showed one channel's attributed pipeline was largely not incremental, budget moved within the month.

EXECUTIVE ASSESSMENT QUESTIONS

1. Do marketing, sales and finance agree on one pipeline number?
2. What is our cost per qualified opportunity by channel and segment?
3. What share of total pipeline is marketing-sourced, and what share influenced?
4. Which of our largest channels have we tested for incrementality?

11 Sales Partnership, Alignment and Revenue Execution

WHY THIS CAPABILITY MATTERS

Marketing does not create revenue on its own; it creates the conditions for sales to win. Where alignment is weak, high-quality demand is wasted through slow follow-up, disputed definitions and leads that disappear. Where it is strong, marketing and sales share targets, plans and a weekly rhythm, and each side holds the other to account. Gartner's finding that 61% of buyers prefer a rep-free experience^[2] raises the stakes: when buyers do engage sales, the handover must be informed and immediate.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Leads are passed by email or list, definitions are disputed and there is no follow-up SLA. Sales feedback is anecdotal and usually negative, and pipeline reviews do not include marketing. TECHNOLOGY Email; spreadsheets MEASURED BY Leads passed
Level 2 Repeatable	Lead definitions, routing rules and a follow-up SLA are agreed and documented. Monthly lead reviews take place, and rejected leads require a reason code. TECHNOLOGY CRM routing; SLA reporting MEASURED BY Speed to lead, acceptance rate
Level 3 Integrated	Marketing and sales share an ICP, funnel targets and a pipeline goal. SDRs work coordinated plays with marketing, joint pipeline reviews run weekly or fortnightly, and feedback improves scoring and campaigns. TECHNOLOGY Sales engagement platform (e.g. Outreach, Salesloft, Gong Engage); shared dashboards MEASURED BY SQOs, conversion, shared pipeline target
Level 4 Predictive	Account plans are shared for priority accounts. Deal intelligence (conversation insights, engagement signals) informs acceleration plays for open opportunities, lost opportunities are reactivated systematically, and marketing contributes to the forecast. TECHNOLOGY Conversation intelligence; account plans in CRM; signal alerts MEASURED BY Velocity, win rate on accelerated deals, reactivated pipeline
Level 5 Adaptive	Marketing, sales and customer success operate as one revenue team with common targets, a single operating rhythm and mutual accountability for new business and expansion. TECHNOLOGY Unified revenue reporting and forecasting MEASURED BY Revenue against shared target; expansion

DEEP DIVE

— The operating rhythm of a mature revenue partnership

Cadence	Forum and purpose
Daily	Automated alerts: MQAs, hand-raisers and target-account surges routed to owners with context.
Weekly	SDR and demand stand-up: speed to lead, acceptance, play performance, blockers.
Fortnightly	Joint pipeline review: new opportunities by source and segment, stalled deals needing acceleration support.
Monthly	Account reviews for tier 1 and 1:few clusters; feedback on lead quality and messaging; recycled and lost-opportunity reactivation.

Quarterly

Revenue business review with finance: targets, segment economics, capacity and investment decisions.

More meetings do not create alignment. What distinguishes Level 4 and 5 is **mutual accountability**: marketing is accountable for the volume and quality of pipeline, sales for follow-up and conversion within the SLA, and both for the shared number. Each side can see the other's performance in the same dashboard.

PEOPLE, PROCESS AND OPERATING MODEL

At Level 3, SDRs or BDRs are the critical connective tissue; whether they report to marketing or sales matters less than whether their plays are designed jointly. RevOps owns routing, SLAs and shared reporting. At Level 4, product marketing equips sales with enablement tied to the same messaging marketing uses, and customer success joins account planning for expansion.

PROGRESSION ROADMAP

1 → 2: Agree definitions, routing and a follow-up SLA; require reason codes for rejections.

2 → 3: Set a shared pipeline target and run joint pipeline reviews; design SDR plays together.

3 → 4: Build shared account plans, acceleration plays and lost-opportunity reactivation.

4 → 5: Move to common revenue targets and one operating rhythm.

WARNING SIGNS

- Speed to lead is unknown or measured in days
- Marketing is not invited to pipeline reviews
- Sales and marketing dispute the definition of a qualified lead
- Lost opportunities are never revisited
- Enablement content is produced without sales input

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A mid-market SaaS company sets a shared quarterly pipeline target for marketing and SDRs, publishes speed-to-lead and acceptance rates weekly, and reviews every stalled opportunity over £50k fortnightly with marketing present. Closed-lost deals are re-scored after six months and routed back into nurture or SDR plays.

EXECUTIVE ASSESSMENT QUESTIONS

1. What is our median time from hand-raise to first sales contact?
2. Do marketing and sales share one pipeline target?
3. What happens to a lost opportunity six months later?
4. Could a sales leader describe marketing's plays for their accounts this quarter?

12 AI Integration, Workflow Automation and Marketing Intelligence

WHY THIS CAPABILITY MATTERS

AI is changing the cost and speed of nearly every demand generation activity, from research and content to scoring, personalisation and reporting. It is also the dimension where activity is most easily mistaken for maturity. Deploying many tools is not progress; embedding AI into governed workflows that measurably improve output, speed, quality or commercial results is. AI therefore appears throughout this book within each discipline, and this chapter sets out how to manage it as a capability.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

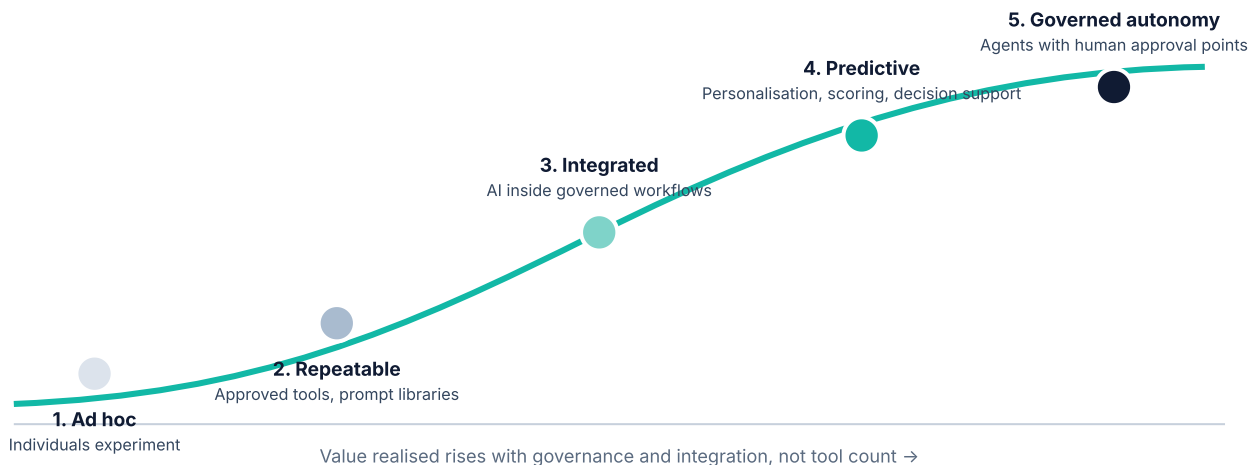
Level 1 Reactive	Individuals use generative AI ad hoc for copy, summaries and research, using personal accounts. There is no guidance on confidential data, accuracy or brand, and nobody knows what is being used. TECHNOLOGY Personal generative AI accounts MEASURED BY None tracked
Level 2 Repeatable	Approved tools, usage guidelines and shared prompt libraries support repeatable use in campaign planning, content drafting, audience research and personal productivity. TECHNOLOGY Enterprise AI assistants; prompt libraries MEASURED BY Adoption, time saved (self-reported)
Level 3 Integrated	AI is embedded in approved workflows: content operations with review steps, campaign build, reporting commentary, account research and analysis. Time saved and quality are tracked. TECHNOLOGY AI inside MAP, CRM and content tools; workflow automation MEASURED BY Cycle time, output per FTE, quality scores
Level 4 Predictive	AI powers personalisation, predictive scoring, account research at scale, workflow orchestration and decision support, with defined data inputs and monitoring of model performance. TECHNOLOGY Predictive models; AI research and enrichment; orchestration platforms MEASURED BY Conversion and personalisation lift; prediction accuracy
Level 5 Adaptive	Governed, increasingly autonomous operations: agents execute defined tasks across connected systems under explicit human approval points, and AI's contribution is measured in business outcomes. TECHNOLOGY Agentic workflows with governance, logging and monitoring MEASURED BY Revenue and efficiency impact attributable to AI

DEEP DIVE

— Four kinds of AI, four kinds of risk

Type	What it does	Typical demand gen use
Generative AI	Produces text, images, code and summaries from prompts	Drafting, localisation, research summaries, creative variants
Predictive machine learning	Learns patterns from historical data to score or forecast	Lead and account scoring, propensity, churn and pipeline forecasting
Workflow automation	Executes defined rules and sequences across systems	Routing, enrichment, alerts, data hygiene

Agentic AI	Plans and takes multi-step actions towards a goal, using tools	Account research and brief creation, campaign QA, list building, report assembly
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AI adoption and automation maturity curve.

— AI opportunity matrix

Ratings below reflect typical conditions for a mid-market B2B team and should be re-scored for your own context. Start where impact is high and risk and effort are low.

Use case	Impact	Effort	Readiness required	Risk
Copy variants and localisation	Medium	Low	Low	Low
Long-form content drafting	Medium	Medium	Medium	Medium
SEO and AI-search optimisation	Medium	Medium	Medium	Low
Paid creative testing and pacing	High	Medium	Medium	Medium
Website personalisation	High	High	High	Medium
Email journey content and timing	Medium	Medium	Medium	Low
Lead and account scoring	High	High	High	Medium
ABM account research briefs ★	High	Low	Low	Low
Buying-intent analysis	High	Medium	Medium	Medium
Sales enablement and call preparation	Medium	Low	Low	Low
Reporting commentary and anomaly alerts	Medium	Medium	Medium	Low
Data hygiene, enrichment and QA	High	Medium	Medium	Low
Agentic workflow orchestration	High	High	High	High

AI opportunity matrix. ★ marks high-impact, low-effort starting points. Amber shading indicates higher effort, readiness or risk.

— Governance essentials

- **Hallucination and accuracy:** any factual claim, statistic or customer reference requires human verification before publication.
- **Data quality:** predictive models and agents amplify poor CRM data; fix fields and definitions first.
- **Privacy and confidential data:** define what may and may not be entered into which tools, including customer data and unreleased plans.

- **Human approval points:** specify which outputs can be published or sent automatically and which need review.
- **Security and access:** use enterprise accounts with logging; review integrations that write to CRM or MAP.
- **Model monitoring:** check scoring and forecast accuracy against outcomes quarterly.
- **Brand governance:** maintain voice guides and examples inside AI workflows, and audit samples regularly.

The test of AI maturity is business value: shorter cycle times, more output at equal quality, better conversion or lower cost per opportunity. A team with three well-governed workflows that save measurable time is more mature than one with twenty unmanaged tools.

PEOPLE, PROCESS AND OPERATING MODEL

At Level 2, an AI lead (often in marketing operations) owns tool approval and guidance. At Level 3, each workflow has an owner, a documented process and a review step. At Level 4 and 5, marketing operations, data, legal and security form a standing governance group, and roles shift from producing first drafts to designing, reviewing and improving AI-assisted workflows.

PROGRESSION ROADMAP

1 → 2: Approve tools, publish usage guidelines and build a shared prompt library.

2 → 3: Redesign three to five high-volume workflows with AI and review steps; measure cycle time.

3 → 4: Introduce predictive scoring, AI account research and personalisation with monitoring.

4 → 5: Deploy governed agents with approval points and measure outcome impact.

WARNING SIGNS

- Staff use personal AI accounts with customer data
- AI-drafted content published without expert review
- Number of AI tools reported as progress
- Predictive scores never checked against outcomes
- No owner for AI governance

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A B2B software team redesigned content production, account research and campaign QA around approved AI workflows. Each has an owner, a review step and a monthly quality audit. Campaign build time fell substantially, and account briefs for every tier 1 account are refreshed weekly from news and intent signals for SDRs to review.

EXECUTIVE ASSESSMENT QUESTIONS

1. Which AI workflows have measurably improved speed, quality or results?
2. What data are staff allowed to put into AI tools?
3. Where do humans approve AI outputs before they reach customers?
4. How do we know our scoring models are still accurate?

13 Marketing Technology, Data Architecture and Governance

WHY THIS CAPABILITY MATTERS

Every advanced capability in this model, from account scoring to personalisation, attribution and AI, runs on data that is complete, matched and trusted. Martech maturity is rarely limited by the tools a company owns; most organisations use a fraction of what they pay for. It is limited by integration, data quality, taxonomy and governance. Investing in foundations is unglamorous, and it is usually the highest-return investment a demand leader can make.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Tools are bought by different teams and connected loosely, if at all. Duplicate and incomplete records are common, field definitions vary, consent records are patchy and nobody owns data quality.
	TECHNOLOGY Standalone tools MEASURED BY None
Level 2 Repeatable	CRM and MAP are integrated with a documented field map. UTM conventions, campaign naming and consent capture are standardised, and basic de-duplication runs regularly.
	TECHNOLOGY CRM-MAP sync; naming and UTM standards MEASURED BY Sync errors; duplicate rate
Level 3 Integrated	Leads are matched to accounts, records are enriched automatically, a lifecycle taxonomy is governed, integrations are documented and platform utilisation is reviewed against cost.
	TECHNOLOGY Lead-to-account matching; enrichment; integration documentation MEASURED BY Field completeness; match rate; utilisation
Level 4 Predictive	A warehouse-centred data model joins marketing, sales, product and finance data. Identity resolution, data-quality monitoring and a governance forum maintain trust, and first-party data feeds activation.
	TECHNOLOGY Warehouse; reverse ETL; data-quality monitoring MEASURED BY Data-quality SLAs; time to insight
Level 5 Adaptive	A composable, governed architecture activates first-party data across channels in near real time, with privacy by design and clear ownership of every data domain.
	TECHNOLOGY Composable CDP or warehouse-native activation; consent management MEASURED BY Activation latency; governed data coverage

DEEP DIVE

Foundations checklist

- **Lifecycle taxonomy:** one documented set of stages and status values used by marketing and sales.
- **Lead-to-account matching:** every lead associated with the correct account, so account-level reporting is possible.
- **Identity and company matching:** rules for duplicates, subsidiaries and domains.
- **Enrichment:** firmographic and technographic data refreshed on a schedule, with source and date recorded.
- **Campaign taxonomy:** naming, hierarchy and UTM rules enforced at creation.
- **Consent and preference data:** captured at source, stored with evidence, synchronised across systems.
- **Integration register:** what connects to what, who owns it and what it writes.

- **Utilisation review:** annual review of each platform's adoption and value against cost.

PEOPLE, PROCESS AND OPERATING MODEL

At Level 2, a marketing operations specialist owns the MAP and integrations. At Level 3, marketing operations and RevOps share a data dictionary and change process. At Level 4, a data or analytics engineer supports the warehouse and governance forum, and every data domain (accounts, contacts, campaigns, opportunities) has an owner.

PROGRESSION ROADMAP

1 → 2: Integrate CRM and MAP; standardise naming, UTMs and consent capture.

2 → 3: Implement lead-to-account matching, enrichment and a governed lifecycle taxonomy.

3 → 4: Centralise data in a warehouse; monitor quality; form a governance forum.

4 → 5: Activate first-party data across channels in near real time with privacy by design.

WARNING SIGNS

- More than 10% duplicate records
- Leads not linked to accounts
- Tools added without an integration review
- Different teams use different lifecycle values
- Paying for platform features nobody uses

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A scale-up maintains a one-page data dictionary, a change-approval process for CRM fields and a monthly data-quality report (completeness, duplicates, match rate). All web, product and campaign data lands in a warehouse, and account scores and audiences flow back to the CRM and ad platforms nightly.

EXECUTIVE ASSESSMENT QUESTIONS

1. What share of our leads are matched to the correct account?
2. Who approves new fields, tools and integrations?
3. Which platforms are we paying for but not using?
4. How quickly can we answer a new pipeline question with trusted data?

14 Organisational Structure, Talent and Operational Excellence

WHY THIS CAPABILITY MATTERS

Capability lives in people, process and rhythm, not in a strategy document. Two companies with identical budgets and tools can perform very differently because one has clear ownership, documented playbooks and a culture of testing, and the other relies on a few individuals working heroically. This dimension also determines resilience: whether performance survives the departure of a key person, a budget cut or a change in strategy.

FIVE-LEVEL MATURITY PROGRESSION · TECHNOLOGY AND METRICS

Level 1 Reactive	Generalists respond to requests from across the business. Priorities change weekly, knowledge sits with individuals, agencies are briefed ad hoc and nothing is documented.
	TECHNOLOGY Email and chat MEASURED BY Output volume
Level 2 Repeatable	Roles are defined, a campaign process exists and planning happens quarterly. Agencies are managed per channel with briefs, and basic documentation covers core processes.
	TECHNOLOGY Project management tools; briefing templates MEASURED BY On-time delivery
Level 3 Integrated	Teams are organised by segment, region or motion in pods with clear pipeline goals, partnering closely with RevOps. Playbooks are documented and an experimentation cadence is in place.
	TECHNOLOGY Shared playbooks; experiment log MEASURED BY Pipeline per head; experiment velocity
Level 4 Predictive	Specialist centres of excellence (lifecycle, paid, ABM, analytics) support segment teams. Capacity is modelled against plan, budget governance is formal, and leaders are accountable for commercial outcomes.
	TECHNOLOGY Capacity and resource planning MEASURED BY Capacity utilisation; cost per opportunity by team
Level 5 Adaptive	A learning organisation: experiments and post-mortems are routine, documentation keeps operations resilient, talent is developed deliberately and the operating model adapts to strategy.
	TECHNOLOGY Knowledge management; learning systems MEASURED BY Learning velocity; retention; time to competence

— Example structures

Start-up 3–8 people	Scale-up 10–30 people	Enterprise 50+ people
• Head of marketing (player-coach) • Demand gen generalist • Content and product marketing • Marketing ops (part-time or contractor) • Agencies for paid and design	• VP marketing / head of demand gen • Segment or regional pods with pipeline goals • Lifecycle, paid and ABM specialists • Marketing ops and analytics, partnered with RevOps • Content, product marketing, brand • SDRs aligned to pods	• CMO and revenue marketing leader • Regional and segment demand teams • Centres of excellence: paid, lifecycle, ABM, events, web • Marketing operations, data and analytics • Content studio and product marketing • Governance: planning, budget, AI, data

Example organisational structures by stage.

Generalists suit small teams that must cover many channels; specialists become essential once a channel's spend or complexity justifies dedicated expertise. Agencies and contractors work best for capacity peaks and specialist skills, provided strategy, data and measurement stay in-house. A centralised model gives consistency and efficiency; a decentralised one gives regional relevance. Most scale-ups settle on a hybrid: central strategy, operations and centres of excellence, with segment or regional pods accountable for pipeline.

— Leadership competencies by level

At Levels 1–2, the demand leader is a strong practitioner and organiser. At Level 3, they must be a commercial partner to sales and finance. At Level 4 and 5, they become a portfolio manager of investments and capabilities, fluent in unit economics, experimentation and organisational design.

PEOPLE, PROCESS AND OPERATING MODEL

The operating model itself is the subject of this dimension. The practical markers of maturity are a written plan everyone can find, a weekly and quarterly rhythm that does not depend on the leader being present, documented playbooks for recurring work, and a budget governance process that allows money to move during the year.

PROGRESSION ROADMAP

1 → 2: Define roles, a campaign intake process and quarterly planning.	2 → 3: Organise around segments or motions with pipeline goals; document playbooks; start a test cadence.	3 → 4: Build centres of excellence, capacity planning and formal budget governance.	4 → 5: Make experimentation and learning routine; invest in resilience and talent.
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WARNING SIGNS

- One person's departure would stop a core programme
- Priorities set by whoever asked last
- Agencies own strategy and data
- No record of past tests or what was learned
- Budget cannot move between channels during the year

WHAT EXCELLENT LOOKS LIKE

ILLUSTRATIVE

A 25-person marketing team is organised into three segment pods, each with a pipeline target, supported by central operations, content and analytics. Every recurring programme has a playbook, every test is logged with a decision, and a quarterly review reallocates budget and headcount between pods.

EXECUTIVE ASSESSMENT QUESTIONS

1. Which programmes would stop if one person left?
2. How quickly can we move budget between channels mid-year?
3. Where are our tests and learnings recorded?
4. Does our structure match how our buyers and sales teams are organised?

PART III

From assessment to action

The executive maturity assessment and two illustrative profiles.

The demand generation maturity assessment

A structured assessment a CMO or VP of Marketing can complete in 15 to 20 minutes, designed to reveal not just where the function stands, but which gaps matter most.

— Instructions

1. **Who:** the marketing leader completes it first. For a more reliable result, two or three colleagues (for example, the heads of sales development, RevOps and marketing operations) complete it independently, and differences are discussed.
2. **How:** for each of the 14 dimensions, read the five statements in the maturity matrix (Chapter 3) and select the **highest level your organisation meets in full**. If you meet some of Level 3 but not all, score Level 2.
3. **Evidence:** score what you can show, not what is planned. If in doubt, score lower; the assessment is only useful if it is honest.
4. **Target:** record the level you need in 12 months, using the go-to-market guidance in Chapter 2.
5. **Criticality:** rate how much the dimension matters to the next year's plan: 1 supporting, 2 important, 3 critical.

— Scoring framework

Gap = Target level – Current level

Priority index = Gap × Business criticality (range 0–12)

Foundation rule = Any foundational dimension (1, 10, 11, 13) scoring 2 or below with a gap is sequenced first, regardless of its index

The foundation rule exists because some weaknesses block progress elsewhere. Advanced ABM cannot be measured without closed-loop reporting; personalisation and scoring fail without matched account data; no channel converts well without an agreed sales hand-off.

— The scorecard

#	Dimension	Current (1–5)	Target (1–5)	Criticality (1–3)	Gap	Priority index
01	Strategy, ICP & planning F					
02	Paid media					
03	Content					
04	Email & lifecycle					
05	Webinars & events					
06	Content syndication					
07	Organic social					
08	Website & conversion					
09	ABM & orchestration					
10	Measurement & analytics F					
11	Sales partnership F					
12	AI & automation					
13	Martech & data F					
14	Organisation & talent					

The 14-dimension maturity scorecard. F = foundational dependency.

— Why an average score misleads

An average maturity score is a convenient summary and a poor guide to action. It treats a Level 1 in a critical dimension as interchangeable with a Level 1 in a minor one, and it lets strengths in visible channels mask weaknesses in the foundations those channels depend on. Always read the profile, the gaps and the criticality together.

— Example: Company A, a high-growth SaaS scale-up

Company A sells workflow software to mid-market finance teams. It has grown quickly on strong paid media and a respected content programme, but reporting stops at MQLs, there is no account-based motion, and lifecycle marketing is basic. Its leadership plans to move up-market next year.

#	Dimension	Current	Target	Criticality	Gap	Priority index	Sequence
01	Strategy, ICP & planning F	3	3	3	0	0	–
02	Paid media	4	4	2	0	0	–
03	Content	3	3	2	0	0	–
04	Email & lifecycle	2	3	3	1	3	5
05	Webinars & events	2	2	1	0	0	–
06	Content syndication	2	2	1	0	0	–
07	Organic social	3	3	1	0	0	–
08	Website & conversion	3	3	2	0	0	–
09	ABM & orchestration	1	3	3	2	6	4
10	Measurement & analytics F	2	4	3	2	6	1
11	Sales partnership F	2	3	3	1	3	2
12	AI & automation	2	3	2	1	2	6
13	Martech & data F	2	3	3	1	3	3
14	Organisation & talent	2	3	2	1	2	7
Average current score		2.4					

ILLUSTRATIVE Completed assessment. Highlighted rows are the top four priorities after applying the foundation rule.

Company A's average current score is 2.4. The average suggests a function that is simply early. The profile shows something more specific: its two largest weighted gaps, measurement and ABM (priority index 6 each), are both critical to moving up-market, and measurement is a foundational dependency. Paid media, its strongest dimension, cannot be optimised further until reporting reaches pipeline. After applying the foundation rule, its priorities are, in order: measurement & analytics (foundation); sales partnership (foundation); martech & data (foundation); and ABM & orchestration (index 6). Sales partnership and martech are sequenced ahead of ABM because ABM depends on both.

— Example: Company B, an enterprise technology business

Company B sells infrastructure software to large enterprises on nine-month cycles. It has invested heavily in martech, a data warehouse and reporting, but campaigns are planned by channel, sales and marketing work from different account lists, and the website is the same for every visitor.

#	Dimension	Current	Target	Criticality	Gap	Priority index	Sequence
01	Strategy, ICP & planning F	3	4	2	1	2	5
02	Paid media	3	4	2	1	2	6
03	Content	3	3	2	0	0	–
04	Email & lifecycle	3	4	2	1	2	7
05	Webinars & events	3	4	3	1	3	4
06	Content syndication	3	3	1	0	0	–
07	Organic social	2	3	1	1	1	8
08	Website & conversion	2	4	3	2	6	2
09	ABM & orchestration	2	4	3	2	6	3
10	Measurement & analytics F	4	4	2	0	0	–
11	Sales partnership F	2	4	3	2	6	1
12	AI & automation	3	3	2	0	0	–
13	Martech & data F	4	4	2	0	0	–
14	Organisation & talent	3	3	2	0	0	–
Average current score		2.9					

ILLUSTRATIVE Completed assessment. Highlighted rows are the top four priorities after applying the foundation rule.

Company B's average current score is 2.9, higher than Company A's, yet its constraints are just as serious. Its mature data and reporting are under-used because the activities they measure are not orchestrated. After applying the foundation rule, its priorities are, in order: sales partnership (foundation); website & conversion (index 6); ABM & orchestration (index 6); and webinars & events (index 3). Its investment should go into operating model and orchestration, not more technology.

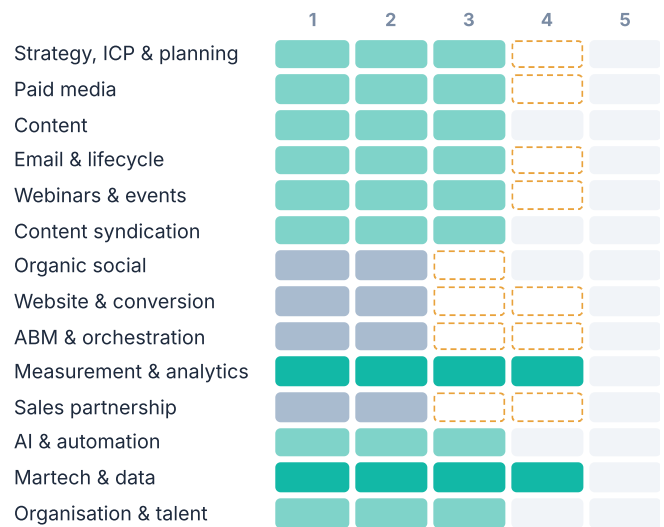
— Maturity heatmap

The heatmap shows current maturity (filled) and 12-month target (outlined) for both illustrative companies.

Company A · scale-up



Company B · enterprise



Current level (shade = level) Gap to 12-month target

ILLUSTRATIVE Sample maturity heatmap for the two illustrative companies.

— Radar view



Company A · scale-up



Company B · enterprise

Current 12-month target

01 Strategy, ICP & planning

02 Paid media

03 Content

04 Email & lifecycle

05 Webinars & events

06 Content syndication

07 Organic social

08 Website & conversion

09 ABM & orchestration

10 Measurement & analytics

11 Sales partnership

12 AI & automation

13 Martech & data

14 Organisation & talent

ILLUSTRATIVE Demand generation assessment radar charts.

— From gaps to priorities

Once scored, use a three-step method to identify capability gaps and decide what to do first.

1. **Rank by priority index**, then move any foundational dimension that triggers the foundation rule to the top.

2. **Check dependencies.** For each priority, ask which other dimensions must improve for it to succeed (for example, ABM depends on sales partnership, data and measurement), and include those prerequisites.
3. **Select no more than four priorities** for the next two quarters. A function that tries to improve ten dimensions at once usually improves none.

NEXT STEP

Go beyond the assessment. Diagnose what's holding you back

Most leadership teams have a view of their marketing performance. Fewer have a shared, evidenced view of the capabilities behind it, or agreement on which gaps to close first.

The assessment in this guide can be completed independently in just 20 minutes. But a **facilitated Demand Generation Maturity Assessment** goes further, helping you understand not just where your function stands today, but how capability gaps may be affecting pipeline performance, marketing efficiency and revenue growth.

With over 18 years of experience building, leading and transforming demand generation functions across B2B technology companies, I've worked across virtually every stage of maturity, and even encountered a few organisations that didn't even make the scale!

Let's put the framework into practice.

Book a conversation with me to walk through the maturity model, explore your current challenges and identify where your biggest opportunities for improvement lie. Together, we'll diagnose the commercial impact of your capability gaps and establish which priorities could deliver the greatest value in the shortest time.



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