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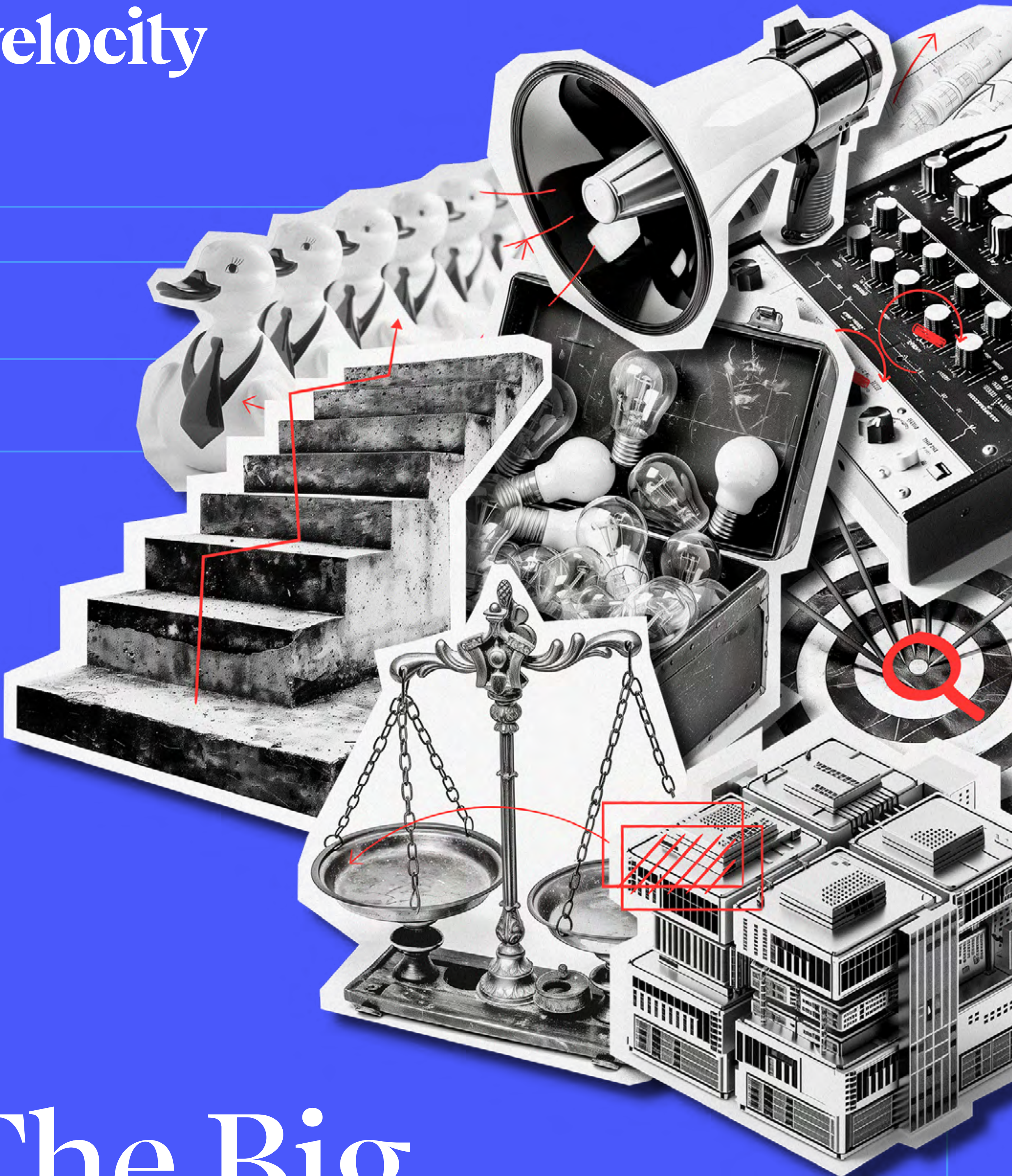


The Big, Beautiful B2B Blueprint

A step-by-step, fill-in-the-blanks guide to a new, unified Go-To-Market that slam-dunks your wildest KPIs

Welcome

A message from our CEO

Hi there friend,

If you're any kind of marketer in B2B, you'll have felt things shifting underfoot recently.

Our industry is facing an effectiveness crisis. I'm seeing more and more marketing leaders stare in disbelief at a growing gap between their pipeline and their revenue targets.

The gap exists for two reasons.

First, traditional inbound tactics are hitting a point of diminishing returns. A generation of buyers have learned that exchanging their data for mediocre content and a lifetime of sales bombardment is a shitty deal.

Second, brand building is at an all-time low. To borrow Jon Miller's analogy, businesses have slipped into treating marketing like a gumball machine (money in, leads out) instead of investing in a brand that buyers want to spend time with.

It's led to a situation where — under immense revenue pressure — marketers are devoting almost 100% of their resources to fruitless sales activation programs that effectively ask strangers to buy first and ask questions later.

So how can marketers get pipeline back on track?

That's what this book is about. The answer isn't some new magic bullet.

It's about getting more out of the pieces already in play.

It's about uniting mature performance-led marketing with fresh creativity.

It's about a new marketing master plan: a GTM blueprint that connects long-term brand building with sharp, focused sales activation into a unified strategy.

It's not a particularly simple or easy answer. But it works. If your B2B marketing is in a performance rut, this is what gets you out of it.

We wrote this book to help people like you transition from the inbound era to the new evolution of B2B marketing.

It's a complex, cross-discipline and deeply practical exercise. But it should be fun and revitalizing too.

I hope you find something helpful inside.

Jessie Tracy
CEO, Velocity Partners

Contents

Picture the scene

You're the CMO of MooSoft™ — an agritech software provider.

Your CEO promised the investors you'd grow by 20% this year — which means Sales and Marketing are on the hook to hit a $4M revenue goal.

But it's nearing the end of the quarter and you're way behind target.

You look at your activities over the last 12 months — and dig into how marketing has contributed to the pipeline (or hasn't).

MooSoft™

MooSoft is a mid-sized, VC-funded company with annual revenues of $20M.

Their main product is E.I.O. — a state-of-the-art farm management platform — with solutions for crop and livestock management, supplier management, data analytics, accounting and more.

A few things stand out

You're spending near 100% of your resources on lead gen → **and almost nothing on brand building***
*see 95-5 rule on P4

The funnel is full of MQLs → **but none of them ever seem to buy**

Your Sales and Marketing teams barely speak → **and the lack of a feedback loop shows in the numbers**

You can't confidently attribute revenue to anything → **you don't know where, when or why leads convert**

There's a serious gap between your current performance and your 20% growth target.

Something needs to change

What do you do?

Option 1

Scale up your existing marketing activities

Keep using your current messaging and content, and increase your paid media spend until you generate enough traffic to hit your targets at your current conversion rates.

Throwing money at the problem is the simple option — a hugely expensive and wasteful way to brute-force marketing's revenue contribution that does nothing to address any of the underlying issues you've surfaced.

Option 2

Increase the effectiveness of your marketing activities

Connect your creative, brand and Go-To-Market machine together in a plan that addresses 100% of the market (the 95% and the 5%*), and builds quality, cost-effective pipeline that translates into reliable revenue.

This is the harder (but infinitely more valuable) option — a marketing master plan that gets your creative strategy, tech stack and GTM processes working together instead of pulling in different directions.

It sounds like an easy decision. But senior marketers make the wrong choice every day, throwing good money after bad, because the pressure of the pipeline feels so overwhelming.

*The 95-5 rule

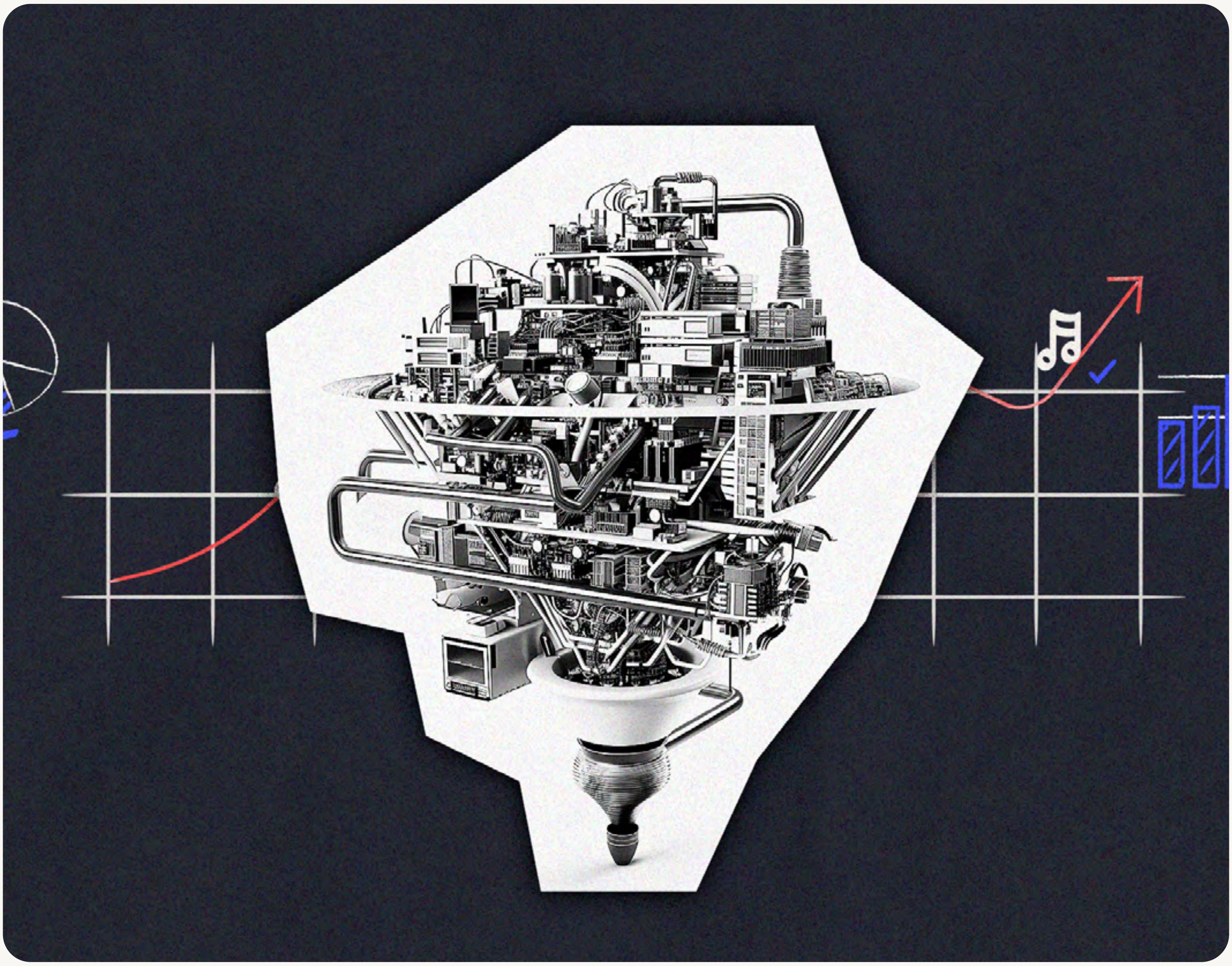
According to research from the Ehrenberg-Bass Institute only 5% of buyers are "in-market" at any one time (the other 95% will buy somewhere down the line).

Most B2B marketers spend nearly 100% of their budget fighting over the same 5% of people ready to buy today, while doing nothing to build a relationship with the 95% of people who'll buy in future.

By focusing exclusively on the 5%, you're ensuring your future pipelines are going to be sub-optimal, too. Next year's business (and every quarter after that) comes from the 95%.

If you take one thing away from this workbook, let it be this: Kill the disparity between sales activation and brand building in your company. Kill it dead before it kills you.

By the end of this workbook, Option 2 will feel as straightforward as Option 1



Keep reading to find out how.

You are going to make a marketing blueprint today

This workbook is a step-by-step guide that helps marketers like you develop what we call a **marketing blueprint**.

A **marketing blueprint** is a Go-To-Market master plan. It unifies everything you need if you want to launch, measure and optimize a high-performing campaign that materially drives revenue.

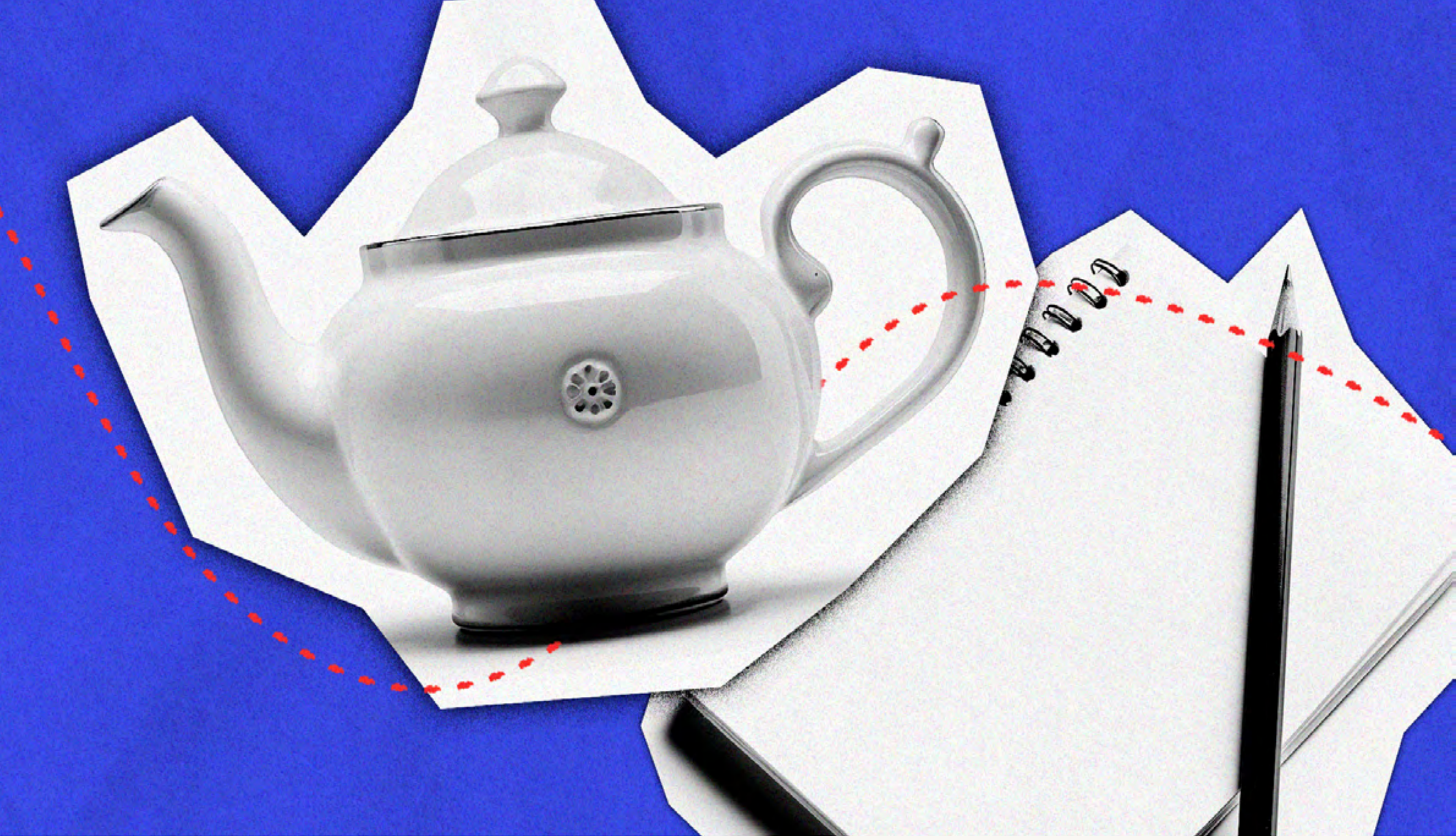
We'll follow along the journey of MooSoft to see how they develop a **marketing blueprint** that breaks them out of their performance rut and puts them on a path back to growth.

But this isn't really about MooSoft. It's about you. So roll up your sleeves, you've got some work to do.

There are 10 sections — each with a practical exercise that you can complete in the companion exercise book.

Here's what you just got yourself into:

1. **The universal audit**
   Go on a hardcore, deep-dive, fact-finding mission that measures exactly how the marketing operation you have today differs from the one that'll achieve your goals.
2. **The context**
   Summarize your audit and additional research into crunchy problem statements, and a pragmatic brief to address them.
3. **Goals and KPIs**
   Distill and translate your business objectives into clear marketing goals, and the metrics and KPIs that will measure your progress towards those goals.
4. **Audience**
   Build a new ideal customer profile — who is your primary buyer? What are their defining characteristics? Who else is on the buying committee?
5. **Creative platform**
   Develop the killer ideas, messages and content pieces that'll cut through the noise and inspire your audience to take action.
6. **Channel strategy**
   Dig into where your audience hangs out — and the moves you need to make to reach them there.
7. **Sales and marketing alignment**
   Map out how sales and marketing teams can work more effectively together to get the most from this blueprint.
8. **Technical considerations**
   Think about the implementation updates you need to make in your MarTech stack to prime your blueprint for success.
9. **Reporting**
   Create the mechanisms to track effectiveness against the KPIs defined in Section 3.
10. **Next steps and owners**
    Translate your plan into a clear list of actions that describe who does what (and when) — including the sequence of actions and dependencies between different teams.



How to use this book

Read it through once by yourself. Then gather your key stakeholders (we'll help you identify them in the next section) and run through the book again to complete the exercises as a group.

By the end, you'll have a marketing blueprint ready for launch.

If you have any gaps, or you get stuck, let us know [and we can help you get unstuck](#).

Ready to go?

Switch on Do Not Disturb.

Assemble a snack pile.

Grab a pen and a scratch pad.

Press play on the Rocky III soundtrack.

Let's do this thing

Section 2

The universal audit

The universal audit

The universal audit is step zero to any marketing blueprint.

It's a hardcore fact-finding mission that pulls together a complete picture of how your daily sales and marketing activities serve (or impede) your goals.

We help companies complete the universal audit in two ways: a **digital marketing questionnaire** and a **data deep dive**.

The **digital marketing questionnaire** is designed to capture the scope and effectiveness of your current marketing efforts — your activities, tech stack, KPIs, objectives and more.

We won't lie: it's comprehensive AF. It contains a wide range of detailed questions that are critical to the success of your blueprint.

But here's the thing — it's totally normal not to know some (or even most) of the answers. Many involve bringing data from different teams and systems together. Others try to capture processes that might never have been defined. Some may require knowledge or skills that you've never had in house.

If there are gaps (and there probably will be), you can plug them with a **data deep dive** that scrutinizes your baseline performance across key channels — from SEO metrics to GA4 analytics, to HubSpot databases, to past campaign performance and even competitor analysis.

The focus here depends on the things you don't know. But your job is to run, nay, *sprint* towards uncertainty and shine a light on all the messy, complicated and neglected parts of your marketing operation. Some of the most common knowledge gaps we see are:

The shape of your content library

What do you have? Where does it live? Which pieces perform best? What could be updated to be more useful?

The performance across your website

How does your site get traffic? How successful are the desired customer journeys across your site? Where do users disengage?

Your end-to-end demand gen machine

What's the size/quality of your database? How do you track and qualify leads? Are marketing and sales processes aligned?

You'll need to perform your own data deep dive. (We'd need to get our grubby little mitts on the innards of your marketing organization and tech stack to do it for you).

What we **can** do is help you answer the digital marketing questionnaire as comprehensively as possible (to minimize the need for a data deep dive at all).

How the digital marketing questionnaire works

The digital marketing questionnaire is a sequence of in-depth questions — you can access the [questionnaire template here](), or in the exercise at the end of this section.

The questions are designed to capture a mixture of factual statements and qualitative judgments.

Aim for brevity, clarity, honesty and specificity throughout. The more focused you are (particularly in the "What success looks like" section), the more effective your blueprint will be.

01
Your MarTech stack

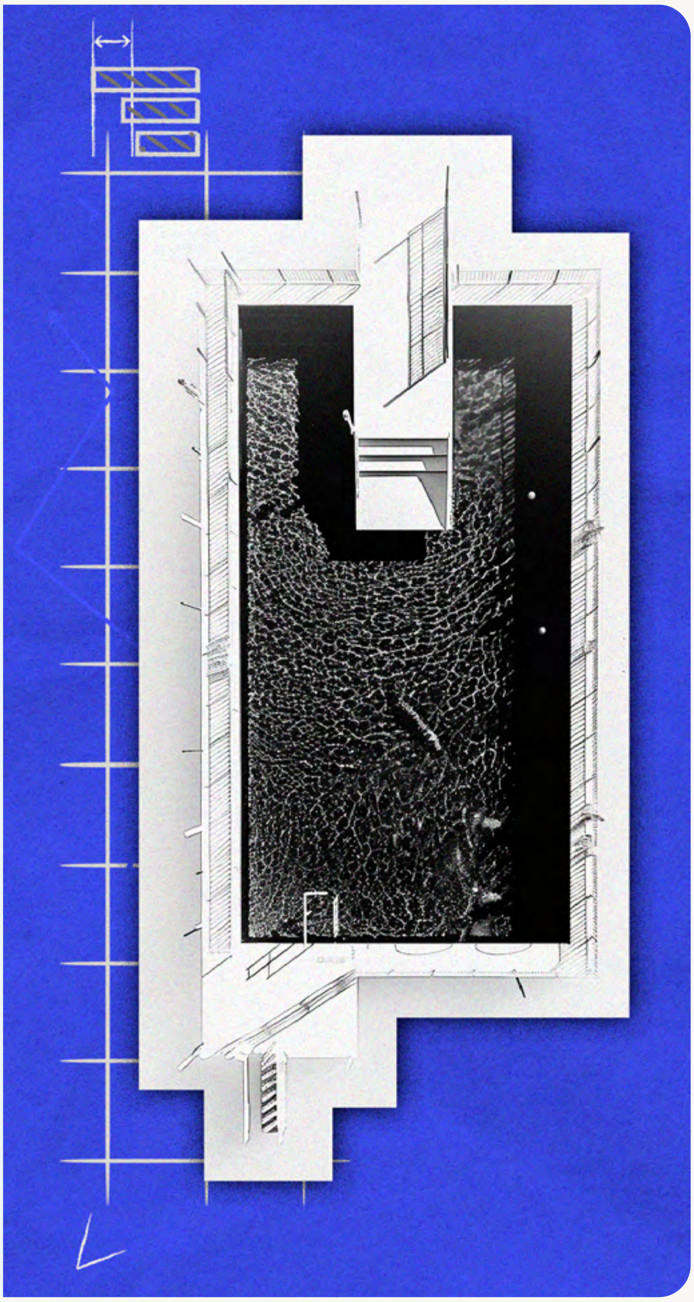
- How do the tools, systems and platforms you use serve your needs?
- Is your data working hard enough for you?
- How mature is your marketing automation capability?

02
Your current activities and performance

- Where, how and to whom do you sell?
- How effective are you?
- How are sales and marketing roles connected in the end-to-end customer buying journey?

03
What success looks like

- How do the different goals across your organization connect to each other?
- How do revenue targets translate into marketing objectives?
- How do those marketing objectives ladder down to specific KPIs and timelines?



Who to include

Invite a core group to participate in the process — with representation from:

Senior Sales and Marketing stakeholders
VPs, directors, heads, leads, etc. — people accountable to revenue from both sides.

Day-to-day operations
Marketing and content managers, strategists, creatives and so on.

Technical folks
Tactical roles (often within the marketing team) across marketing operations / marketing automation / CRM managers / analytics.

The hardest part of the digital marketing questionnaire is often the stakeholders rather than the questions. That's understandable: you're asking hard things of busy people.

Do the best you can with the responses you get and don't sweat it if you can't get everyone to play ball right away — the blueprint will feel more self-evidently valuable the further you progress.

What to do with your results

Your answers will form the source material to start building your blueprint (which we'll start in the next section).

But even before you begin that process, you should start to get a picture of the efficiency and effectiveness of your marketing operation across different dimensions.

You'll spot correlations and discrepancies that might prompt follow-up questions, like:

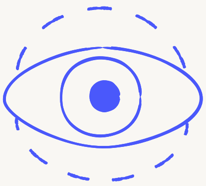
What's the relationship between our paid media spend and our sales pipeline?

How many MQLs translate into SQLs?

How many of the leads in our CRM look like our ideal customer profile?

Which of our target keywords lead to the most valuable user journeys on our site?

Which of our marketing campaigns last year had the biggest observable impact on revenue?



Look for signals and issues that feel urgent to address (particularly those that might jeopardize your campaign launch, like missing capabilities or a lack of proper reporting). Make a note of any themes or threads that emerge — they'll be useful for the next section.

Example #1

MooSoft completes the universal audit

The MooSoft CMO completed both the data deep dive and digital marketing questionnaire with input from a range of stakeholders, including: sales and marketing leaders, operational marketing folks (like managers and content), and technical marketing roles (across areas like analytics, CRM and campaign management).

The combined results revealed a lot — but the team synthesized their answers into a few key findings:

Marketing is falling behind its revenue targets ⟶ but it's unclear how they'll close the gap

Lead-gen is smothering brand building ⟶ almost every campaign touchpoint ends with premature sales activation

Sales and Marketing aren't speaking ⟶ they're short on shared processes and have no agreed SLAs for individual campaigns

Lead volumes are high, but conversions are low ⟶ a perfect storm of broad targeting and expensive, spray-and-pray content syndication means Sales spent far too long qualifying ill-fitting prospects

Poor visibility into true impact ⟶ limited understanding of which channels and content drive quality leads

See MooSoft's questionnaire here

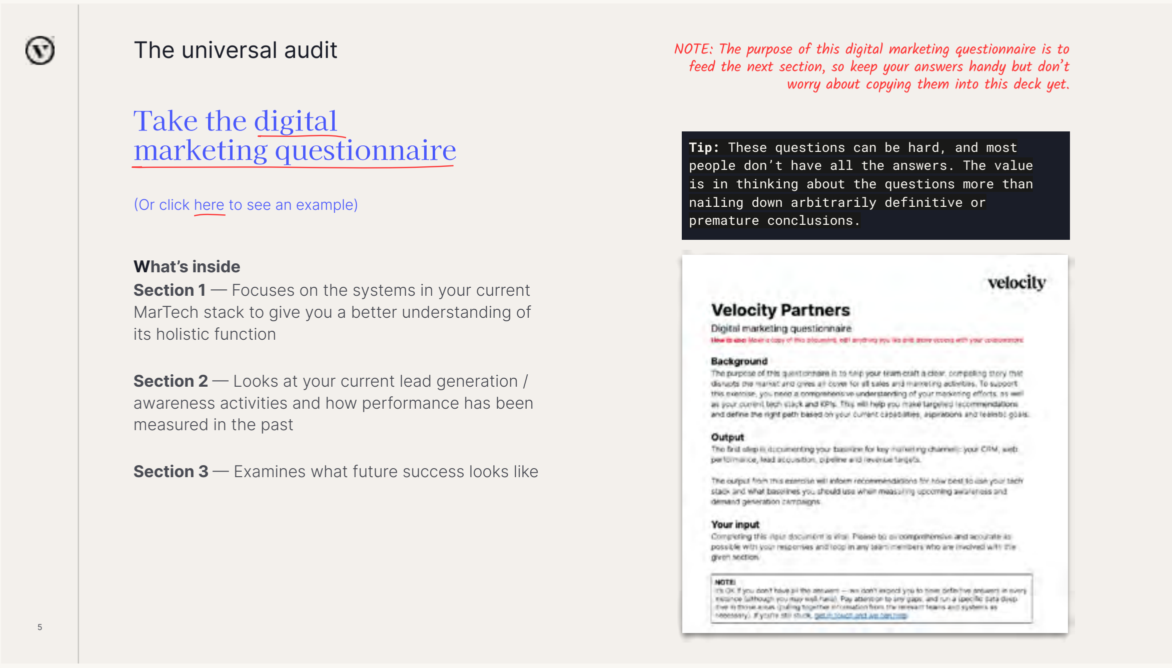
Exercise #1

Take the digital marketing questionnaire

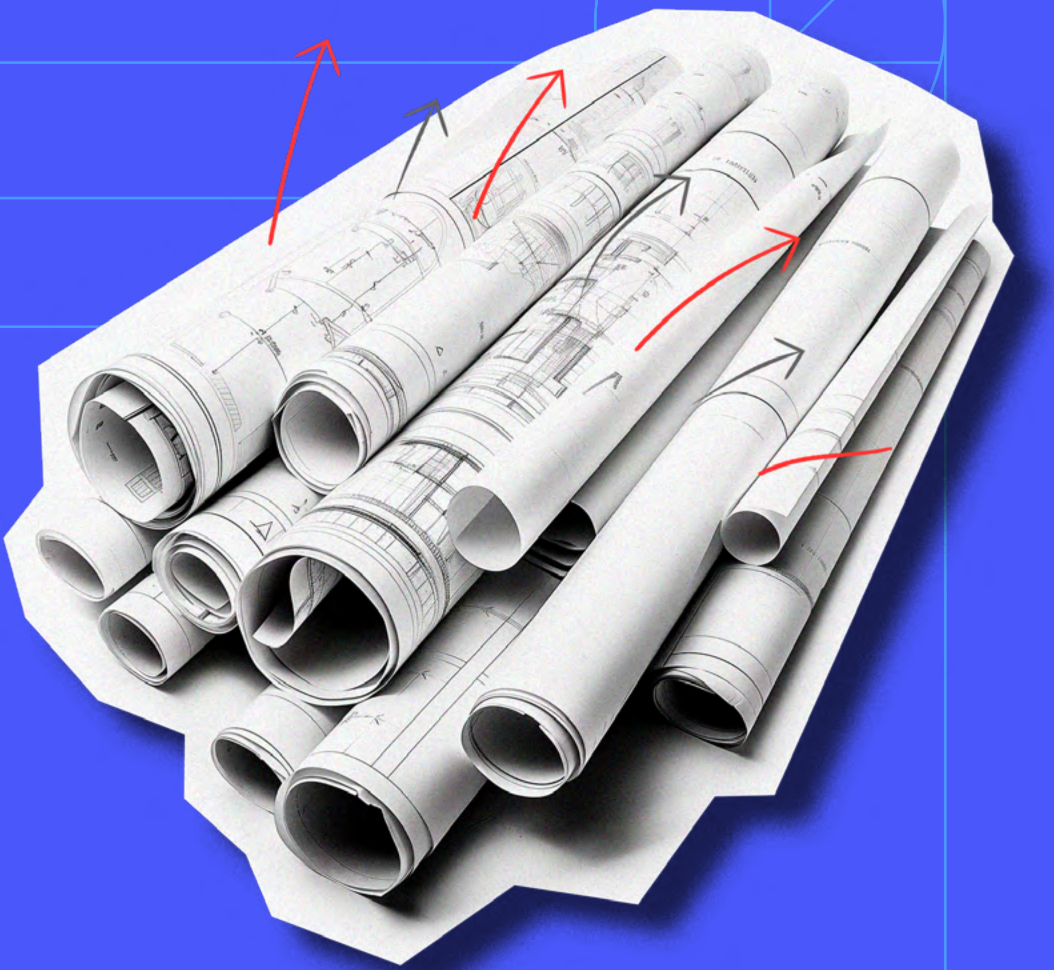
Follow the link to access the digital marketing questionnaire.

Take the questionnaire

Slide 5 in exercise book



A tip: These questions can be hard, and most people don't have all the answers. The value is in thinking about the questions more than nailing down arbitrarily definitive or premature conclusions.



Section 3

The context

The context

If the universal audit is Stage Zero, the context is the first section of the blueprint proper.

Your answers to the digital marketing questionnaire should help you do two things:

01
Form some hypotheses

What's working well (and what isn't), how different problems are connected, which challenges are urgent and which are secondary

02
Establish some baselines*

What are you measuring today? What are some realistic uplift expectations? What metrics are you not measuring that'd make the biggest impact to the business? How are different metrics connected?

*We're pretty particular about baselines vs. benchmarks at Velocity. Read our post about how to avoid falling into the benchmark trap.

The context is a consolidated list of the key hypotheses and baselines that set the direction for the rest of your strategy.

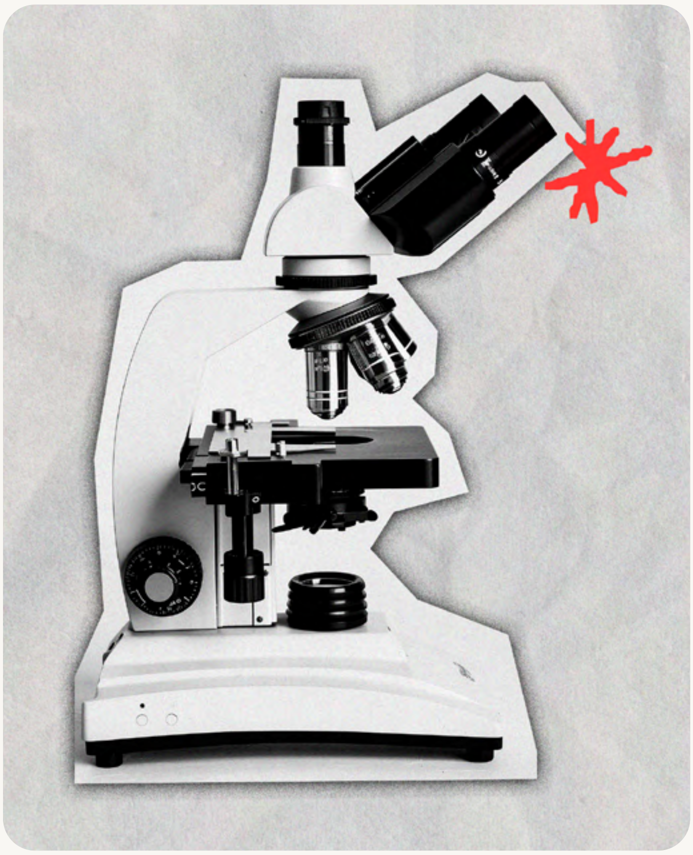
It's a sequence of linked factors that describe **what's working well** and **where to improve** that should help to:

Expose all the friction and vulnerabilities across your marketing operation.

Diagnose the root causes of your obstacles.

Establish some crunchy problem statements.

Set some goals that make you sweat a little (while staying achievable).



Let's take a look at a practical example with our pals over at MooSoft.

Example #2

The context for MooSoft

What's working well

Content syndication is delivering lead volume
MooSoft spends around $280k/year on content syndication that delivers around 1,500 leads — for an approximate CPL* of $131.

Broad reach
MooSoft syndicates to an intentionally broad audience to hit its lead generation targets.

Good reporting hygiene
Monthly reporting from the analytics team predicts an ambitious contribution of MQLs to the Sales pipeline.

*Cost per lead

Where there's room for improvement

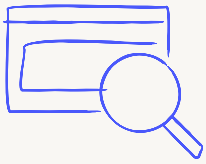
Zero awareness marketing
The MooSoft marketing budget is solely focused on sales activation, with zero brand building.

Poor lead quality
Broadly targeted content syndication generated lots of leads, but most have never heard of MooSoft when Sales gets in touch.

Bland, gated content
Most MooSoft content is heavy on product and short on reasons to care (and all of it is hidden behind forms).

Poor attribution
A gap in understanding where leads come from or how campaigns contribute to downstream metrics (like MQLs, meetings and deals).

Limited feedback loop
Sales and Marketing aren't telling each other what they need from each other to improve.



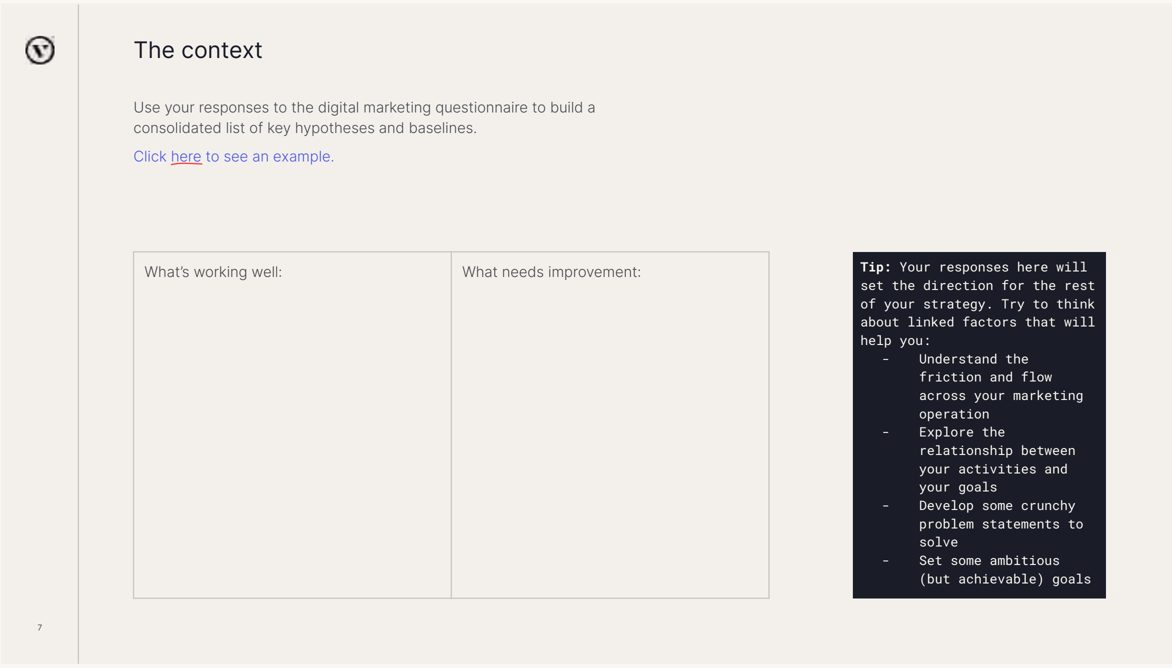
Exercise #2

Fill in your context

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slide 7 in exercise book



Using the context to set new goals

The context effectively sets the problem for the rest of the blueprint to solve.

In the next section, we'll look at how to transform this context into clear **goals and KPIs** that meet your high-level revenue objectives *and* fix the issues identified throughout the audit.

Section 4

Goals and KPIs

Goals and KPIs

The universal audit should capture your marketing performance as it really is.

The context should clarify the high- level change requirements needed to meet your objectives.

The goals and KPIs section of your blueprint is where things start to get really crunchy.

This is where you measure the gap between your big-picture goals (like revenue targets) and your current performance benchmarks (as identified during the audit).

It's likely there will be some discrepancies. That's a good thing — it means you can see what needs to change (and what you need to measure) in order to truly hold Marketing accountable to the bottom line.

Start by mapping out your existing targets, and the marketing activities and outcomes you'd need to hit them.

Let's look at the breakdown for MooSoft.

Example #3

MooSoft sets goals and forecasts against benchmarks

MooSoft has agreed to a target of 20% YoY growth with investors, which equates to a revenue target of $4M.

The average order for the E-I-O platform is $100,000.

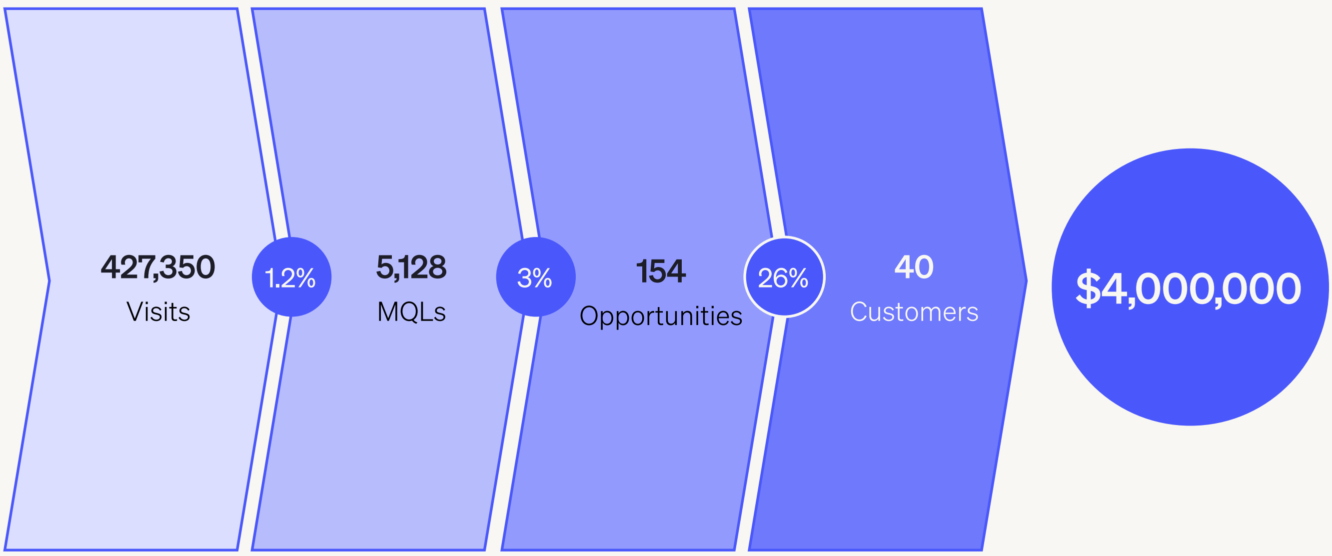
So in order to hit their revenue target, MooSoft needs 40 new customers this year.

Using the baseline performance identified during the universal audit, MooSoft knew that:

1.2% of web visitors become MQLs

3% of MQLs become opportunities

26% of opportunities become customers



Working backwards from those baseline conversion rates, in order to hit their revenue target, MooSoft needed:

154 opportunities, stemming from...

5,128 MQLs, which will come from...

427,350 web visits.

Here's the problem: last year MooSoft generated around 45K web visits in total.

To reach 427,350 visits, they'd need to (at least) 10X their media spend.

That is — obviously — barnyard crazy.

Example #3

So MooSoft took a different approach. Instead of simply buying more traffic, MooSoft decided to focus on improving lead quality and growing conversion rates.

If MooSoft could...

Increase web visits to MQLs to 1.5%

Grow the MQL to Opportunity rate to 10%

Improve Opportunity to Customer to 30%

Then they could achieve their target of 40 customers with approximately 100K web visits (a way more achievable number).

*Depending on deal size.

Now look. That's a big if.

Attracting better leads and increasing conversions isn't simple. But it is possible.

To get there, you need a few things.

We're going to explore how to do those things in the next few sections.

A story that feels compelling and urgent for your ideal customers

A content program that rewards prospects for spending time with you

A channel strategy that ensures you show up where your audience hangs out

A shared plan that formalizes SLAs between Sales and Marketing

A measurement framework that proves your impact to revenue and helps you optimize over time

Exercise #3

Create your goals and KPIs

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

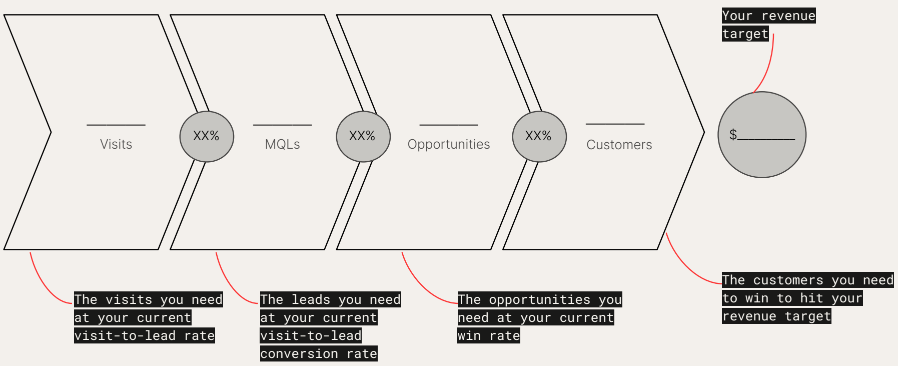
Slides 9-10 in exercise book

Goals and KPIs — baseline performance

First, fill in this chart using the baseline performance figures identified in the digital marketing questionnaire.

Then play with the numbers and conversion rates on the next slide to set some improvement KPI targets.

Click here to see an example.



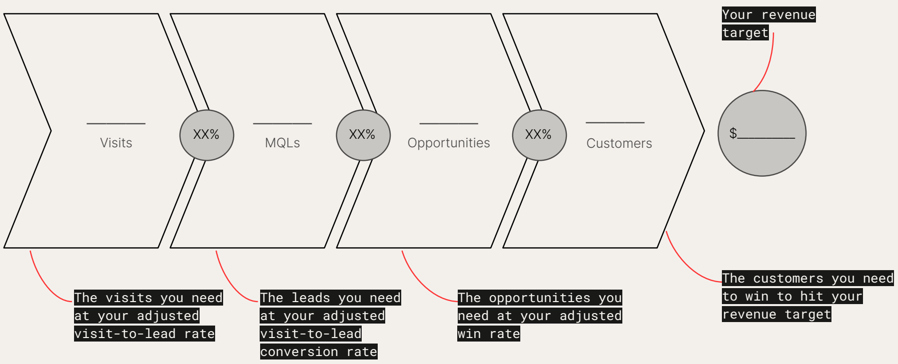
9

Goals and KPIs — improved KPIs

NOTE: Every funnel is different. Add any additional stages that you use (like MQLs and SQLs) along with the conversion rates between them.

Adjust the baseline figures and conversion rates identified on the previous page to see how improved performance changes the throughput requirements between each stage.

Tip: Try to aim in the middle of ambitious and realistic.



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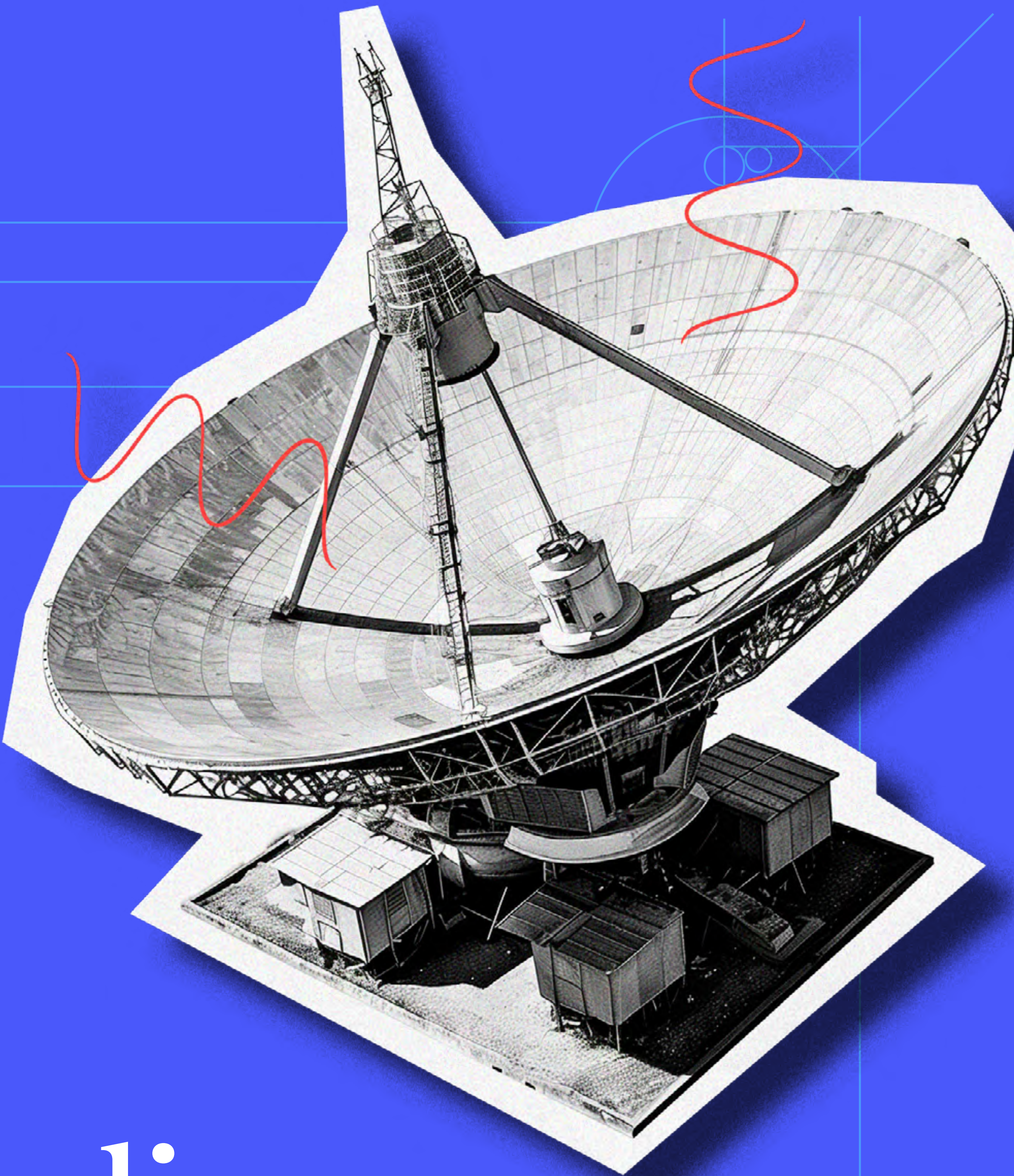


Section 5

Audience

Audience

It goes without saying that you need to target the right folks in order to achieve the goals and KPIs you laid out in the last section.

The issue is that B2B marketers often aim both too broadly and too narrowly at the same time.

They aim too broadly
Because they're under immense pressure to generate demand at almost any cost — so they blast out ads and content indiscriminately and call anyone who clicks an MQL.

They aim too narrowly
Because their ads and content all point straight towards a commercial action — they're only targeting the 5% of buyers actually in-market for a solution, and saying nothing to the other 95%.

There are a few moves you need to make to define and connect with your ICP* more effectively:

*Ideal Customer Profile

Engage 100% of your market
by building brand equity with the 95% of potential future buyers, and focusing on sales activation for the 5% actively ready to buy.

Create intentful content journeys
with specific, helpful and valuable experiences that clearly signal lead maturity to Sales.

Sell to committees, not individuals*
unless you're selling the lightest of lightweight SaaS, your primary buyer probably needs a few different signatures.

*Selling to buying committees

Most B2B buying journeys involve multiple layers of stakeholder approval. The exact stakeholders roles vary, but there are common archetypes.

You don't need to engage every persona here directly — but you should develop resources that help your primary buyer handle objections and win confidence across this group.

- **Economic buyer:** the ultimate budget holder.
- **Executive sponsors:** a leadership member responsible for change.
- **Influencers:** consultants, experts and specialists who advise on the decision.
- **End-users:** the folks using the product or service in daily workflows.
- **Gatekeepers:** stakeholders applying due diligence from backgrounds like IT, legal, compliance, governance, data and others.

Demographics vs. Psychographics

A great ICP goes beyond demographic information (like headcount, location, revenue, budget, etc.) and considers psychographic* information.

*Psychographic information describes softer factors, like personality characteristics, attitude, values and interests.

Psychographics are powerful in B2B.

The cost of change is usually pretty high for prospects — your biggest competitor is probably inertia and the instinct to "do nothing" — so it pays to market to people who share your beliefs.

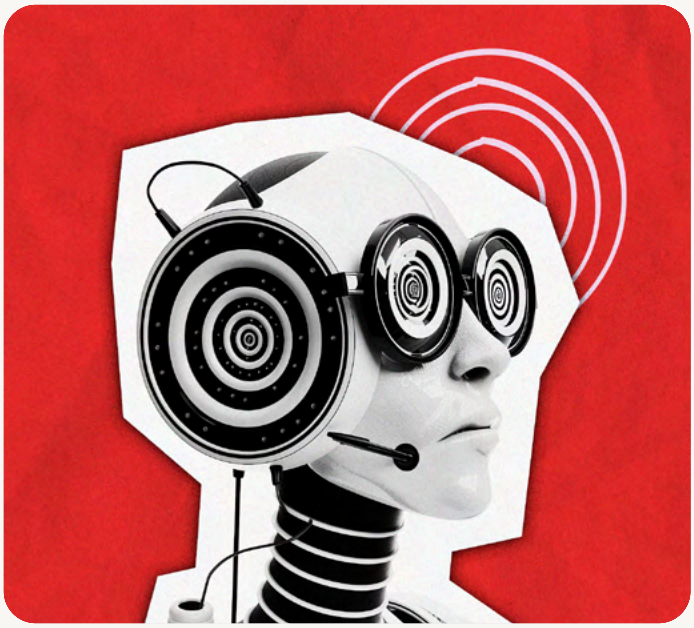
For example, if you're challenging a marketing status quo, your sweetest prospects are likely to be challengers themselves.

Challenger people expect to buy from challenger vendors, so finding an audience of people who are (for example) highly motivated to change or early adopters of technology means you can focus your marketing resources where they'll have the biggest impact.

For example...

An ICP of "Operations managers in a mid-sized American manufacturing company" doesn't give you much to work with.

Add to that "...who are also ambitious, early adopters of new technology and deferential to experts," and the picture starts to get pretty specific.



The problem is that no one sells lists of prospects who think a certain way. Instead, you have to build a brand that attracts those people — by showing up in the places they spend time, with an attitude and a voice that mirrors theirs.

We'll talk more about the harmony of audience, creativity and channel strategy in Section 7.

For now though, let's look at how MooSoft tightened their understanding of buying committees and psychographics to develop ICPs that drove better marketing outcomes.

Example #4

MooSoft maps out their ICP

Historically, MooSoft did what a lot of B2B marketers do: shot straight for C-level buyers with expensive content syndication campaigns.

Leads like this look good on paper, but almost never go anywhere when Sales reaches out (most don't even remember engaging with MooSoft content).

Instead, the team looked at their sales pipeline data for the last 12 months and created a segment of customers whose approximate spend matched the average deal size named in their goals KPI breakdown.

They interviewed Sales about these deals, and sketched out an ICP using the following criteria:

Demographic	Mid-sized (and growing) Agribusiness Firms	
Country	**Tier 1** US, UK, France, Germany	
	Tier 2 Spain, Australia, Ireland, The Netherlands, Canada, Belgium, Austria, Switzerland	
Industries	**Farming and agriculture**	
Company size	**250+ employees, +$20M in revenue**	
Buying committee	Economic buyer	**Head of Operations**
	Exec sponsor	**SVP of Operations**
	Influencers	**Head of Finance, Head of Logistics**
	End-users	**Supply Chain / Logistics / Inventory Manager**
	Gatekeepers	**SVP of Finance**
Overview	• Large, multi-site agribusiness firms with complex supply chain operations, large software footprint and a diverse range of functional teams across supply chain and operations • Market volatility and rising logistics costs means finding new sources of operational efficiency is a meaningful competitive advantage	
Pain points	Spiraling tech footprint, data accuracy, supply chain complexity, inventory management, operational inefficiency, sustainability and regulatory compliance	
Psychographic traits	Sensitive to FOMO, curious about new technology, driven by data	

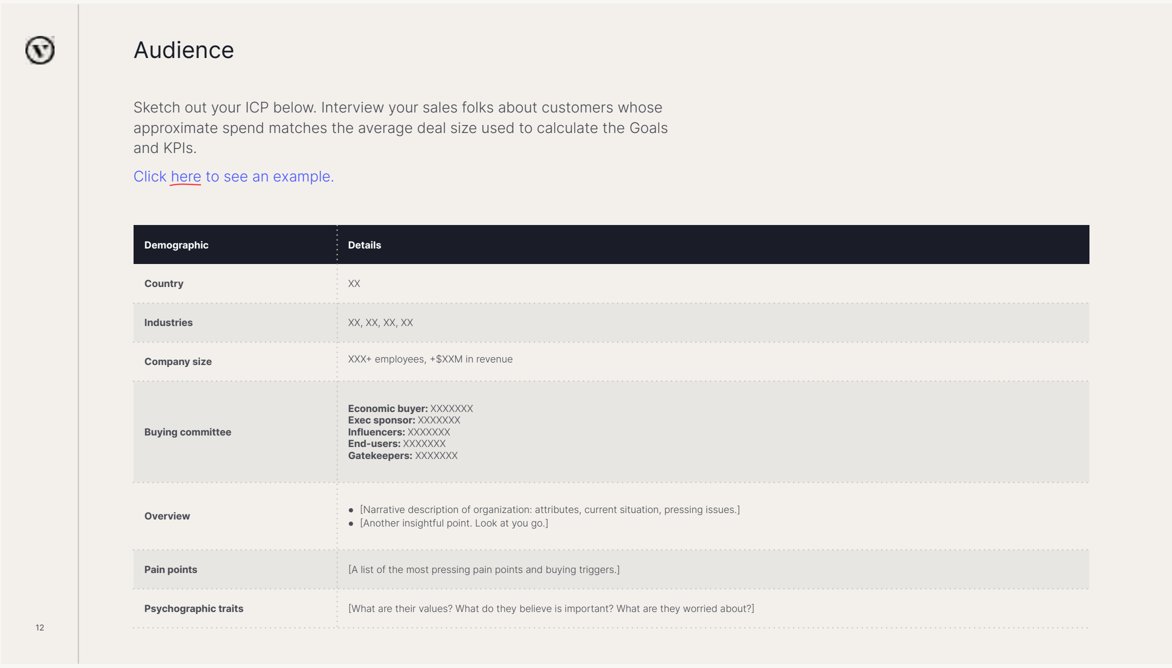
Exercise #4

Map out your ICP

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slide 12 in exercise book



Audience

Sketch out your ICP below. Interview your sales folks about customers whose approximate spend matches the average deal size used to calculate the Goals and KPIs.

Click here to see an example.

Demographic	Details
Country	XX
Industries	XX, XX, XX, XX
Company size	XXX+ employees, +$XXM in revenue
Buying committee	**Economic buyer:** XXXXXXX **Exec sponsor:** XXXXXXX **Influencers:** XXXXXXX **End-users:** XXXXXXX **Gatekeepers:** XXXXXXX
Overview	• [Narrative description of organization: attributes, current situation, pressing issues.] • [Another insightful point. Look at you go.]
Pain points	[A list of the most pressing pain points and buying triggers.]
Psychographic traits	[What are their values? What do they believe is important? What are they worried about?]

12

Section 6

Creative platform

Creative platform

So here's the thing: MooSoft is a fake company.

But a shitload of marketers are in the exact same position as **MooSoft** — trying to meet ambitious revenue targets with a funnel full of **'sugar rush' leads** (and falling short).

As we said in Section 3, it's too expensive and wasteful to close that gap by brute forcing lead volumes with paid media.

You need something that **attracts better quality leads** and **improves your conversion rates** (from traffic to lead, lead to opportunity, and opportunity to deal).

And for that, you need creativity.

We'll cover:

How to develop an idea

How to translate that idea into a pragmatic content plan

How to road test that idea in some rough ad creative

Let's go.

The power of a creative platform

A creative platform is a foundational idea that inspires everything you need for a campaign — messaging, ads and content that grabs your ICP by the lapels and convinces them to act.

This is more than a slick phrase or a clever line — it's a new insight into your audience's world that solves a problem or creates value for them in some way.

The best way to show you how to develop a creative platform is through a practical example — so we're going to take a slightly longer deep dive into the steps **MooSoft** followed to develop their own.

How Velocity develops a creative platform

A few years ago we developed a framework called The Galvanizing Story.

It's a five-part narrative structure that explains the need for your offering and its impact — a market-facing elevator pitch packed with mojo that makes customers excited.

A Galvanizing Story is a rock-solid foundation for a marketing blueprint — learn about how to make your own in this **blog series**.

"It may well be that creativity is the last unfair advantage we're legally allowed to take over our competitors."

Bill Bernbach

Legendary creative director, founder of DDB

Example #5

The MooSoft creative platform

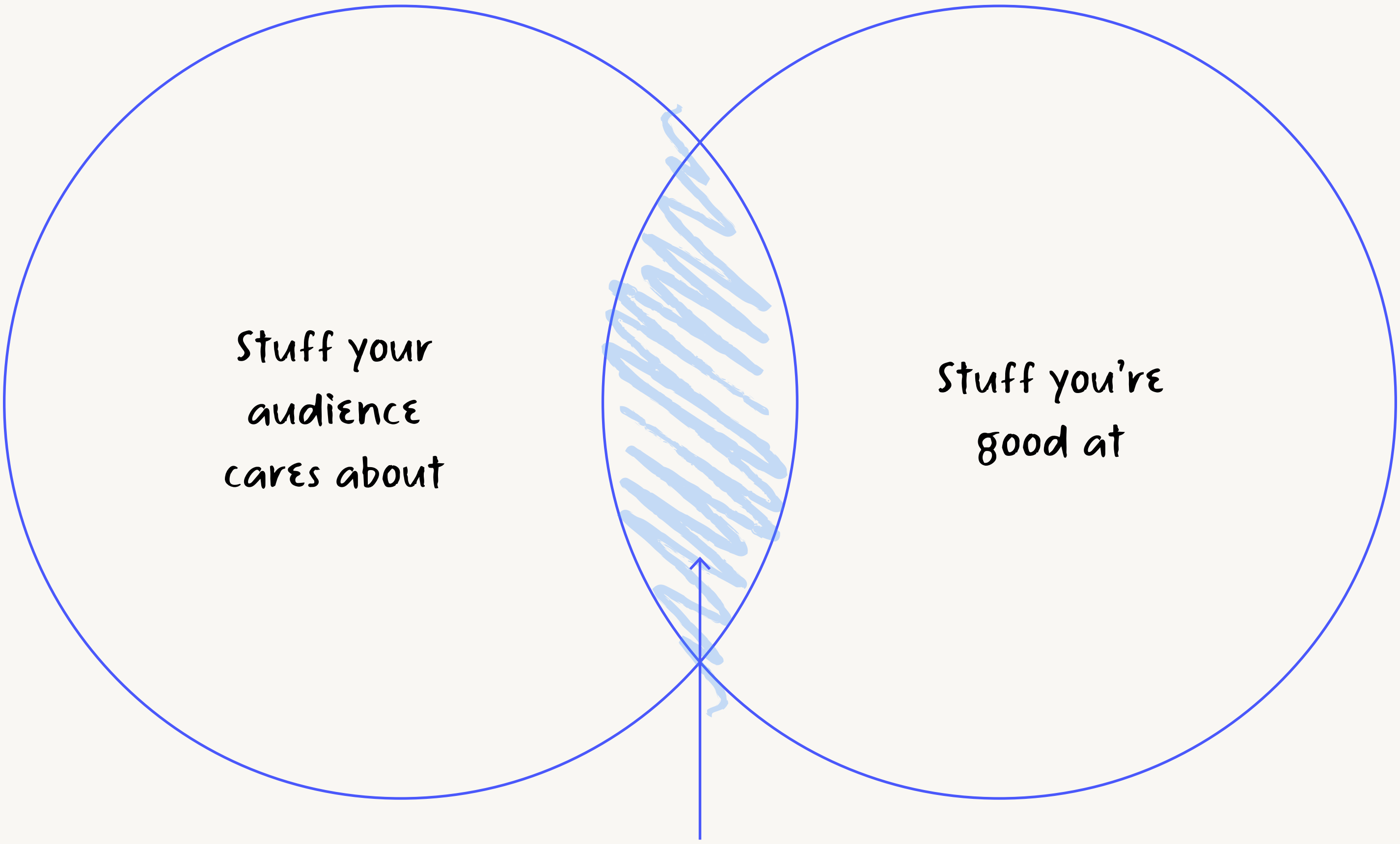
How to develop an idea

A great creative platform is more than a cool idea — it's a practical and extensible concept that is:

- Rich enough to feed a whole campaign
- Anchored to the goals you're trying to achieve
- Appealing to the audience you're trying to address.

MooSoft began brainstorming some creative territories to explore using the pain points identified in the audience section of the blueprint to guide their thinking.

There are some example territories to get your juices flowing in the practical exercise at the end of this section — but you should focus on territories in the sweet spot between stuff your audience cares about and stuff you're an authority on.



The creative platform sweet spot

Example #5

The MooSoft creative platform

For **MooSoft**, that was about the pains of tech sprawl — "spiraling tech footprint" was listed as the top pain point for their core buyer, and the **MooSoft E-I-O platform** has a compelling tech consolidation use-case.

> Remember: creativity is subjective — it's easy to get carried away with cool ideas and clever lines that excite you. Try to keep in mind that you aren't your customer, and this is about them, not you.

Farmstack Fragmentation

The path to precision agriculture

Upgrade your farmware

De-silo your data

Sustainability starts in the tech stack

Attack tech sprawl

Reap and replace

The foundation for smart farming

Evangelize replatforming

Break new ground

Harvesting big data for IoT, robotics, drones

Territories

The last agritech platform you'll ever buy

Name the challengers we serve

Supply chain and operations as hero

Romance our AI offer

Every farm is a software business

Say hello to the new MacDonald

Level the growing field

End-to-end optimization — from soil to sale

The new GTM for agribusiness

MooSoft decided to run a campaign that named and attacked the biggest pain their best customers struggled with:

"Farmstack Fragmentation"

Example #5

The MooSoft creative platform

The content plan

Next, the **MooSoft** team needed to translate **Farmstack Fragmentation** into a content plan designed to **grow lead quality** and **increase conversion rates**.

To grow lead quality, you need content that:

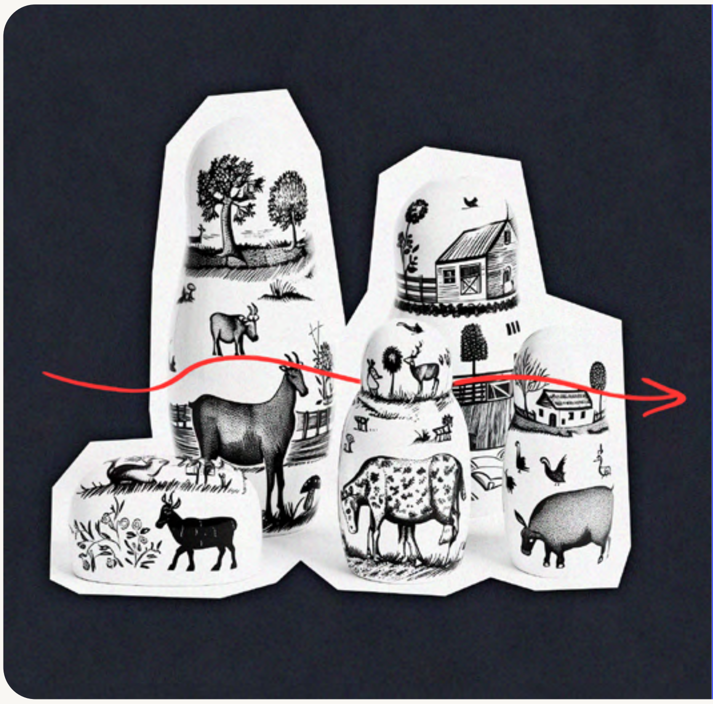
- Builds a relationship with future buyers (so they think of you when they're ready).
- Qualifies current buyers (so you can surface the folks ready to talk to Sales).
- Shows up (and looks good) in the places your buyers spend time*.

*More on that in Section 7

To increase conversion rates, you need content that:

- Galvanizes people to act (with urgent storytelling and clear next steps).
- Improves over time (with metrics that measure real impact to revenue)*.

*More on that in Section 9



MooSoft used a jobs-to-be-done model to map out its requirements from the campaign:

Jobs to be done:

- **Grow awareness** among 95% of out-market buyers
- **Build FOMO** among 5% of in-market buyers
- **Prove credibility** with a data story for influencers and gatekeepers
- **Drive demo sign-ups** by pointing towards its demo at suitable moments

Example #5

The MooSoft creative platform

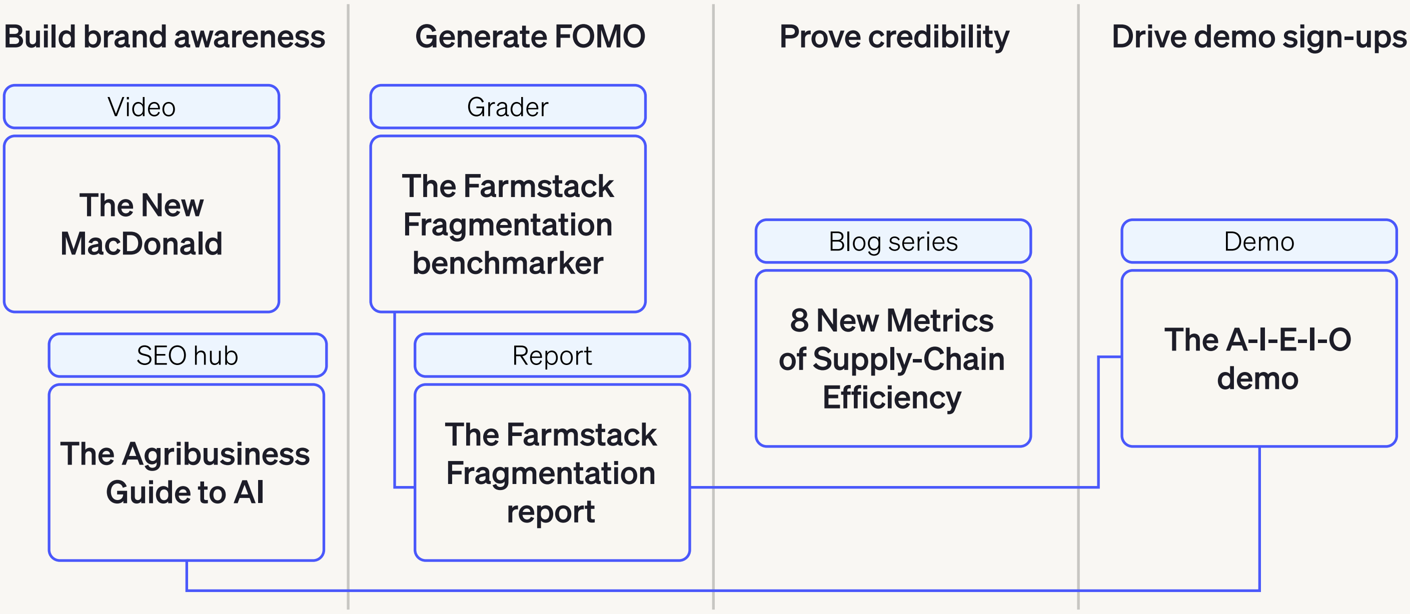
With these jobs identified, MooSoft sketched out a skeleton content plan that would serve each one:

Grow awareness
"The New MacDonald" — a playful brand-level video designed to build brand recall.

Build FOMO
"The Farmstack Fragmentation benchmarker and report" — an interactive grader tool and custom report that shows users how their tech stack sprawl compares with MooSoft customers (and points towards the demo).

Prove credibility
"8 New Metrics of Supply-Chain Efficiency" — a data-led blog series about the custom supply chain metrics of real MooSoft customers.

Drive demo sign-ups
"The Agribusiness Guide to AI" — an SEO hub optimized for mature, high-intent searches that lead towards the MooSoft demo.



The rough creative road test

The final stage of a creative platform is to explore some market-facing creative executions of your story.

We call this *rough creative* — fake ads that experiment with different ways to tell your story for your ideal prospects.

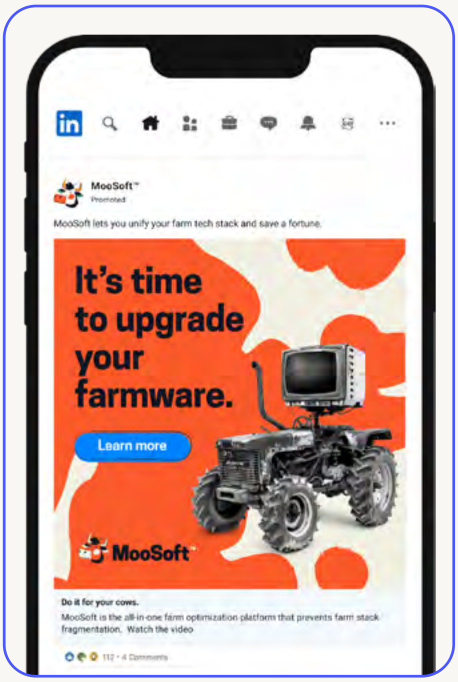
It's an incredibly useful exercise to translate all your careful thinking and strategy so far into the kind of thing your audience will (hopefully) see in the wild.

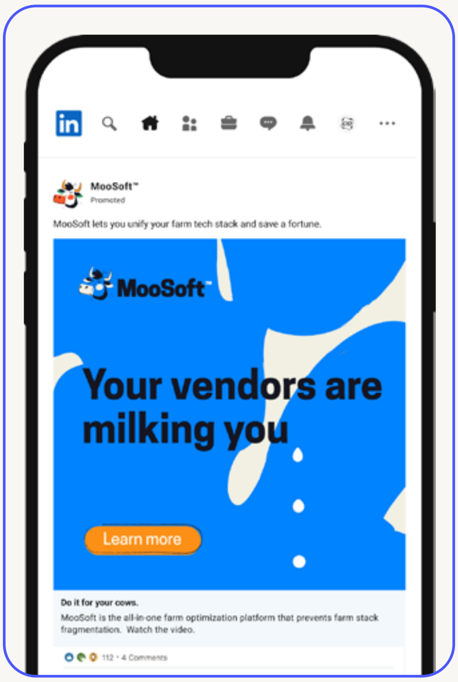
And it's the best way to test drive your creative platform. Is it compelling? Would it make you stop scrolling? Would you click on it to find out more?

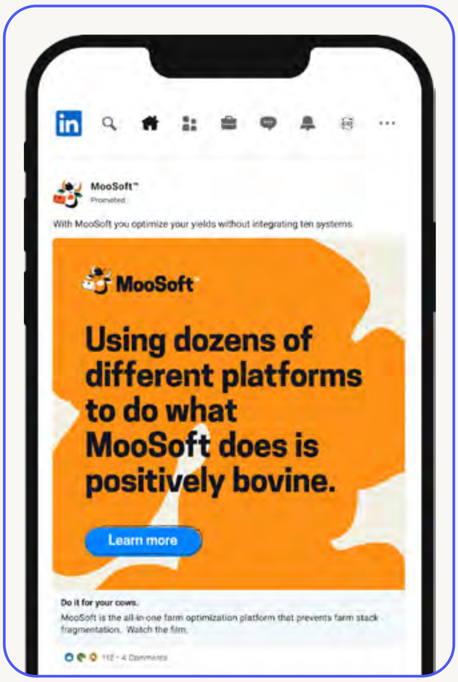
Example #5

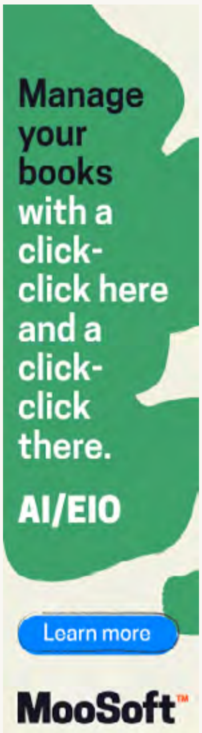
MooSoft rough creative examples

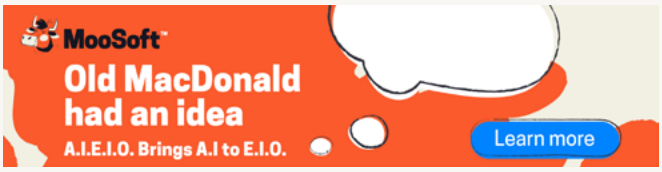
Here's what MooSoft came up with:











Example #5

MooSoft rough creative examples

Here’s what MooSoft came up with:

Here are some pointers to get you started:

Start with some simple idea nuggets. What’s the emotional heart of your story? Speed? Order-from-chaos? New possibilities? Relief of resolved pain?

Zoom into human moments. Get as specific as possible.

Go big on mojo. A good way to cut through the ‘meh’ is to expand your comfort zone. Take a big swing. If you can hear Legal tutting in your head, keep going.

Say one thing at a time. And say as little as possible.

Get experimental. Write an ad about how it feels to use your product. Try ventriloquizing your customer’s customer. Proclaim a belief. Get weird with it.

Save the best ideas to use later. Your story will never be as fresh as it is right now.

Try to have fun. It’ll show in the work.

Exercise #5

Develop your creative platform

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 14-15 in exercise book

Creative platform — territory mapping

Brainstorm some creative territories that could form the core idea for your creative platform. Start with big themes, and flesh out some specific ideas within each one. There are some example themes for inspiration, but feel free to use your own.

Click here to see an example.

Tip: Use the pain points identified in the audience section of the blueprint to guide your thinking.

[Idea]

[Idea]

[Theme 1: attack your bad guy]

[Idea]

[Theme 5: evangelize a new capability you enable]

[Theme 2: empathize with an obstacle]

Territories

[Theme 4: name the kind of business your best customers become]

[Theme 3: make a hero of your users]

[Idea]

[Idea]

14

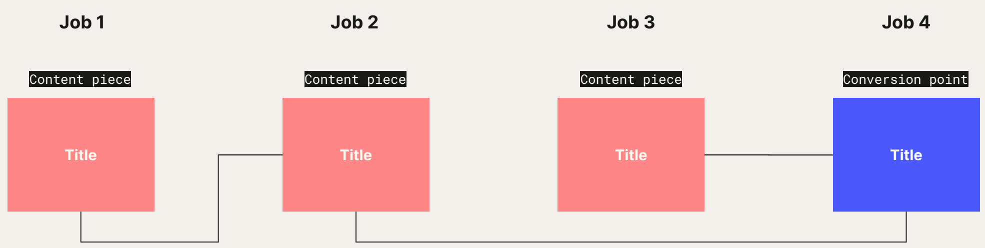
Creative platform — content mapping

Take the strongest theme and idea from the previous slide, and use it to map out a skeleton content plan for your campaign. Think about both the pieces and the journey between them.

This is a jobs-to-be-done model. Some example jobs to do are: grow awareness, build brand, explain the offer, attack the pain, evangelize upside, provide credibility, build FOMO, compare solutions, build business case, and answer objections.

Click here to see an example.

Tip: Add in more stages if you need to – but try to keep to a critical path.



15

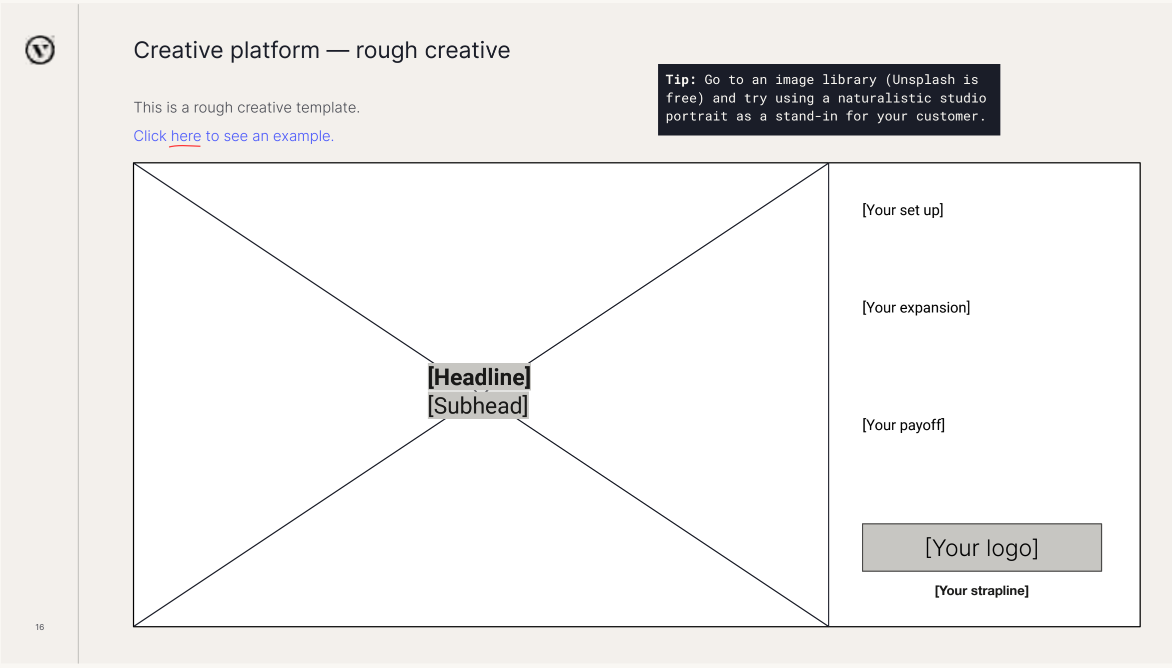
Exercise #5

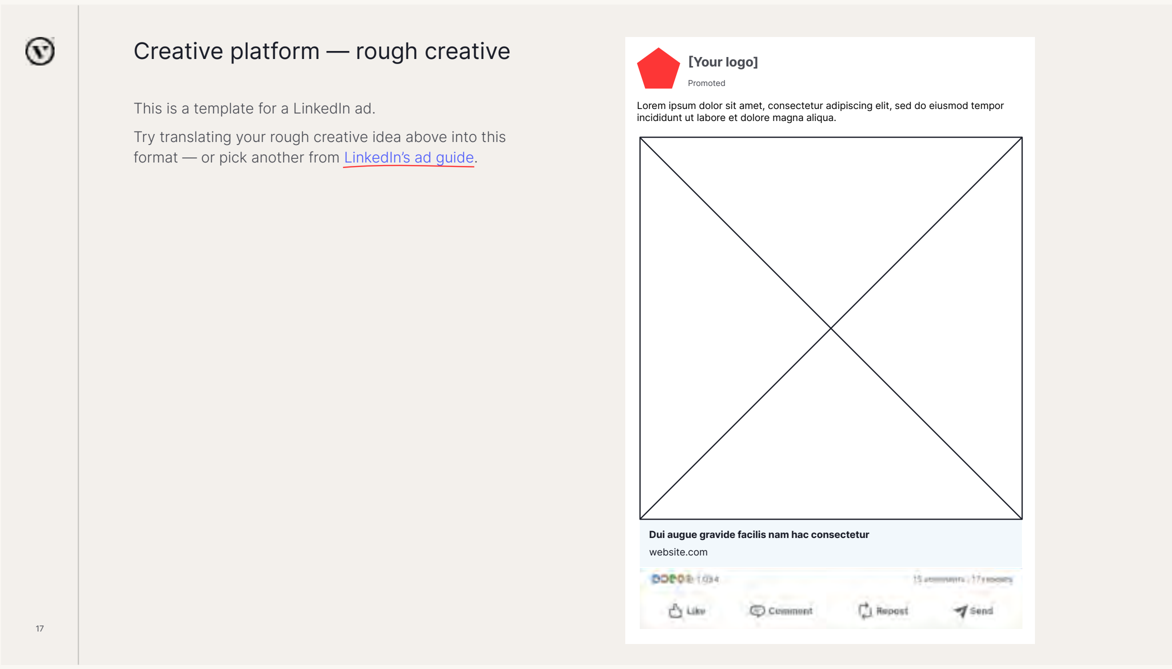
Rough creative template

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 16-17 in exercise book





Section 7

Channel strategy

Channel strategy

One of Velocity's founding principles is, "How you say things matters as much as what you say." Channel strategy adds the "where" to that — it's about the power of saying things in the right places.

Great channel strategy ensures that your marketing shows up and stands out in the places your best buyers spend time. And that's harder than you might think.

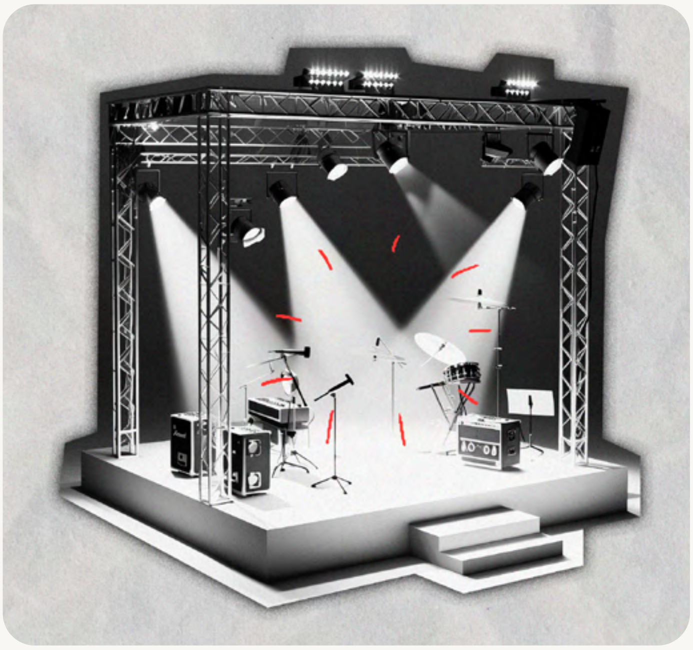
First, because you're competing in a bare-knuckle street fight for the attention of your best prospects (and digital means direct competitors and adjacent companies can join the fray with ease).

Second, because people treat channel strategy like an executional practicality rather than a strategic consideration — and so falls way short of its potential.

When you tack channel strategy onto the end of a campaign plan, you tacitly assume you're the most important thing on whatever page you appear on.

But when you tightly integrate channel strategy with your goals and KPIs, ICP and content planning, you can create messages and content experiences specifically designed to stand out in the context of each touchpoint.

That requires a balance of integrated planning, multi-channel air coverage, and implementation practicality.



01
Integrated planning

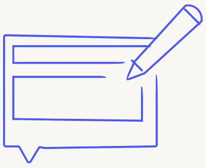
Make no mistake: channel strategy is campaign strategy. Go back to the earlier sections of the book and think about how channel considerations should influence and mutually reinforce your:

Goals and KPIs
Your objectives have channel ramifications (you wouldn't try to drive awareness by posting to your own blog, or capture MQLs with a YouTube video).

Ideal customer profile
Where do your best customers spend time? Are they part of specialist communities? What about the rest of the buying committee?

Creative platform and content plan
Are your ads and content ideas optimized for the places they live?

Channel strategy

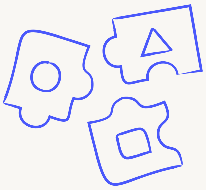


02
Multi-channel air coverage

As much as intentionality matters, there's an inherent unpredictability to digital marketing.

Most B2B buying journeys are long and nonlinear — and it usually takes multiple touchpoints across different channels before prospects remember you (let alone buy from you).

To maximize your chances of being in the right place at the right time, you need to be visible in as many channels as makes sense for your key buyers.



03
Implementation practicality

As your multi-channel plans get more ambitious, so do the technical and operational details required to support them.

Even something as simple as a campaign using a native form on LinkedIn requires technical changes across multiple systems — in this case, syncing your CRM so that whenever someone completes a form on LinkedIn, it creates a record in your database.

Don't be afraid to keep things simple at first — at the end of the day, the best channel strategy is the one you can deliver.

Two toxic metaphors that cloud channel strategy

01
The sales funnel

Marketers think in funnels because of the shape — a broad group of potential buyers becomes a smaller group of leads, and opportunities and deals. But real world funnels benefit from gravity — a downwards force that pulls everything through without intervention.

Gravity doesn't exist in B2B sales and marketing. If anything, it's reversed — we have to counter the forces that drive prospects away. Similarly, real-world funnels have sides — but there are thousands of ways out of B2B sales funnels, and only a very few lead to sales people.

02
The customer purchase journey

Real journeys start with intention: people know where they want to go before they start. Purchase journeys start with a question: Where should I go to achieve my desired outcome?

B2B buyers grope around in the dark thinking about their own problems and occasionally stub their toe on something solid (hopefully you). Even if they investigate, they're still liable to wander off again afterwards.

Example #6

MooSoft develops a channel strategy

To develop a channel strategy MooSoft looked at the channel considerations implied by their goals, ICP and content plan.

Goals and KPIs

Grow lead quality and increase MQL-to-opportunity conversion rate.

This implies both a brand-level awareness play (to build equity with 95% of out-market buyers) and a deeper content play (that galvanized users to take a demo).

ICPs

Heads of Operations at mid-sized Agribusiness firms

MooSoft looked for agritech and supply chain communities — the best two candidates were LinkedIn and agri-tech-e.com: a specialist membership organization of researchers, tech companies, growers and producers.

Content plan

A mix of formats with clear implications for paid and organic tactics

- **A brand video: YouTube, Programmatic, Meta**
- **An interactive benchmarker: LinkedIn and agri-tech-e.com (an agritech innovation community)**
- **A blog series: Meta and LinkedIn retargeting**
- **An SEO hub: Organic and paid search**

Example #6

MooSoft develops a channel strategy

They collated these channel requirements and mapped their content plan against them:

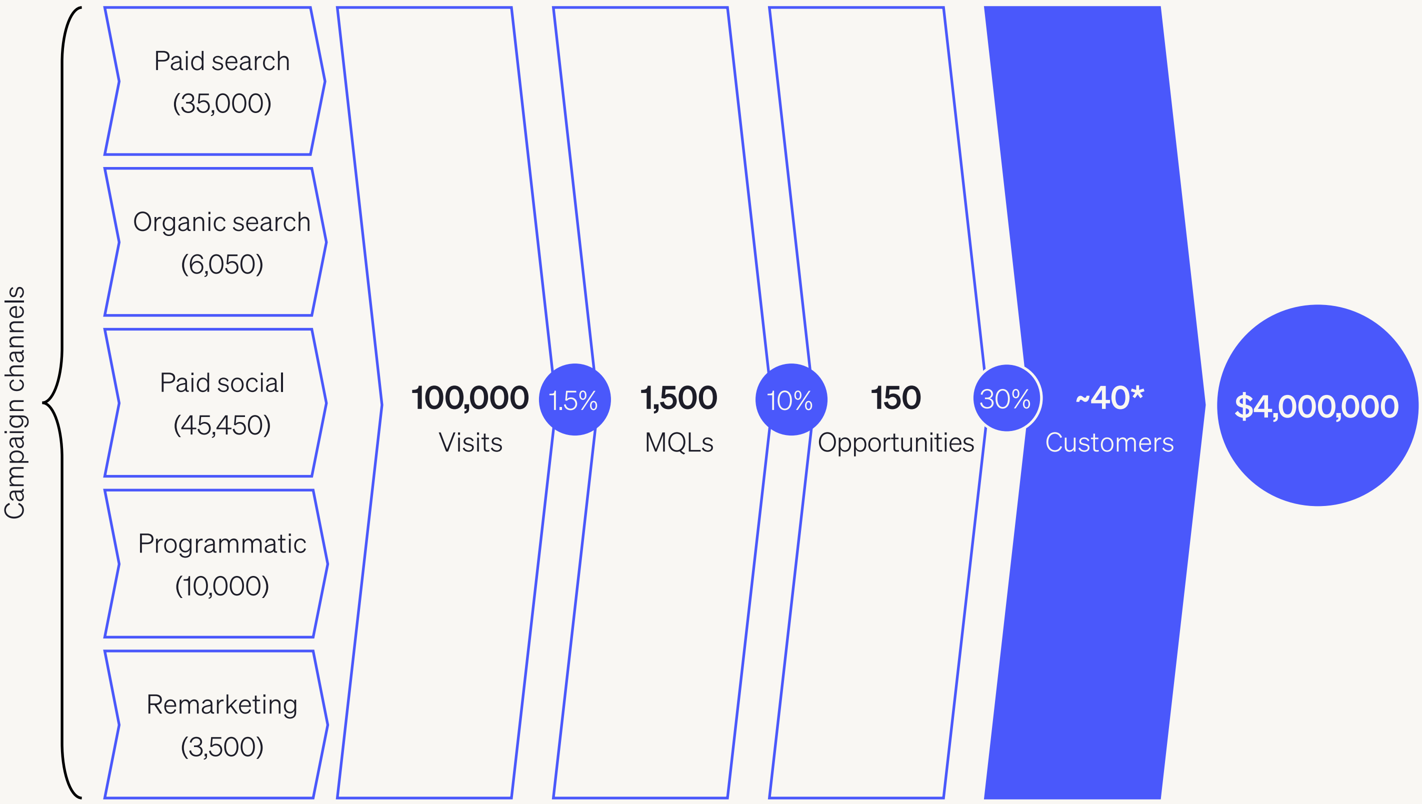
Channel	Goal	The New MacDonald video	The Farmstack Fragmentation benchmarker and report	SEO hub	Blog series
YouTube	Awareness	✓			
LinkedIn	Awareness+Traffic		✓		✓
	Remarketing		✓	✓	✓
Programmatic (DV360)	Awareness+Traffic			✓	
Paid Search	Awareness+Traffic			✓	✓
Meta	Awareness+Traffic		✓		
	Remarketing		✓	✓	✓
Specialist publication (agri-tech-e.com)	Awareness+Traffic		✓		

Example #6

MooSoft develops a channel strategy

Next, MooSoft returned to the goals and forecasts defined in Section 4.

They'd already worked backwards to understand the number of opportunities, MQLs and web visits they'd need to win 40 customers. Now they started mapping how those channels would contribute to the visits needed to hit their target.



*Depending on deal size.

Next, MooSoft calculated the rough spend they'd need to commit to each channel in order to deliver the results outlined in their goals.

This is a process of mapping your baselines and benchmarks (identified in the audit) against paid media budgets, and trying to factor in the performance uplift you expect your creative work and conversion improvements to make.

It's hard to accurately forecast the results you need to meet your desired outcomes — think of it more as a projection that's likely to fluctuate than something cast in stone.

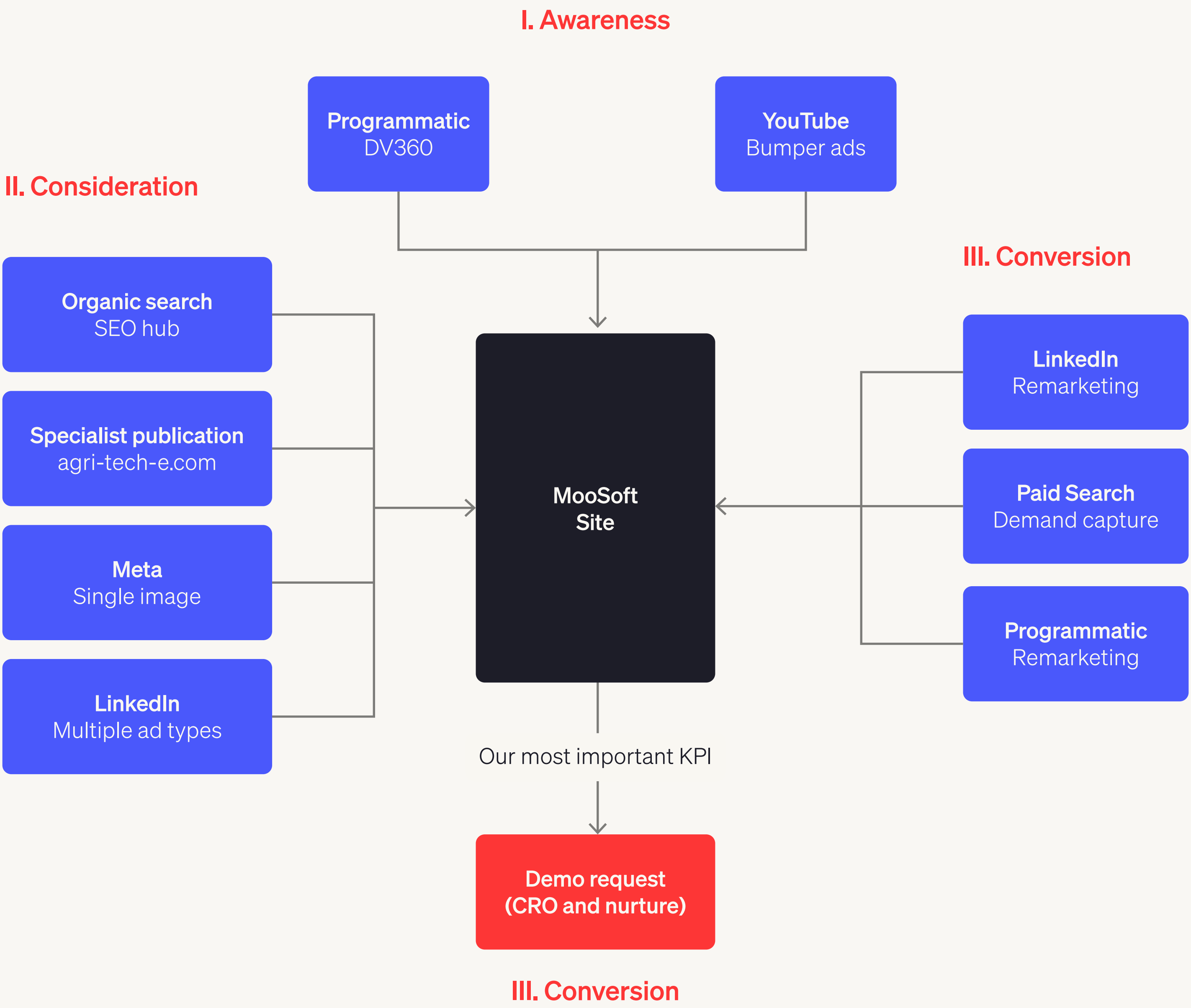
Try to fine-tune your investments for different results. For example, if your plan depends on unaffordable paid media spend, try offsetting the shortfall with an increase in organic tactics. (This obviously creates changes further back in the plan.)

Example #6

MooSoft develops a channel strategy

Finally, when MooSoft's team was happy with the mix of channels, the associated costs and the expected outcomes, they sketched out two things:

01 A full campaign schematic (to visualize how the channel mix led towards on-site conversions)



Example #6

MooSoft develops a channel strategy

02 A full breakdown of the costs and targets for each channel.

Platform	Content (incl. production cost)	Promotional asset cost	Media budget	Impressions	Visits	Content engagements	Demo requests
Awareness							
YouTube	The New McDonald video ($25,000)	$8,000	$120,000	10,000,000	10,000	7,500	5
Programmatic (DV360)	SEO hub ($22,000)	$6,500	$90,000	5,000,000	10,000	2,500	10
Consideration							
LinkedIn boosted and messaging posts	Farmstack Fragmentation benchmarker and report ($26,000)	$6,000	$40,000	600,000	4,000	1,000	15
Specialist publication (agri-tech-e.com)		$6,500	$30,000	495,000	10,000	7,500	143
Meta single image ads		$6,000	$10,000	430,000	2,525	500	8
LinkedIn single image and carousel ads		$6,000	$150,000	2,000,000	15,000	12,000	210
Organic search	SEO hub (costs reflected above)	–	–	300,000	6,050	5,500	178
LinkedIn single image and carousel ads	Blog series ($15,000)	$6,000	$40,000	850,000	4,100	3,700	66
Conversion							
Paid search	SEO hub and blog series (costs reflected above)	$8,000	$400,000	950,000	35,000	670	679
LinkedIn remarketing	Farmstack Fragmentation benchmarker and report, SEO hub and blog series (costs reflected above)	$6,000	$30,000	450,000	2,500	48	48
Meta remarketing		$6,000	$5,000	75,000	1,000	19	19
TOTAL	$88,000	$65,000	$915,000	21,150,000	100,000	40,937	1,381

Exercise #6

Develop your channel strategy

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 19-20 in exercise book

Channel strategy — channel mapping

Map out the content in your creative platform against the most relevant channels — both in terms of the best fit for the asset, and the places where your ICP spends the most time.

Click here to see an example.

Tip: Some key assets naturally fit better in channels (like videos for YouTube), while other formats can be promoted across a wider range of tactics (e.g., LinkedIn, Meta, Paid Search)

Channel	Goal	Content piece 1	Content piece 2	Content piece 3	Content piece 4
YouTube	Awareness				
LinkedIn	Awareness + Traffic				
	Retargeting				
DV360	Awareness + Traffic				
Paid search	Awareness + Traffic				
Meta	Awareness + Traffic				
	Retargeting				
Other — add your own					

19

Channel strategy — budgeting and forecasting

For each channel, map out your budget allocation and forecast your expected returns from that investment.

Click here to see an example.

Platform	Content needed	Content budget	Media budget	Impressions	Visits	Content engagements
Awareness						
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
Consideration						
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
Conversion						
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
XXXXX	XXXXX	$___	$___	___	___	___
TOTAL		$___	$___	___	___	___

20

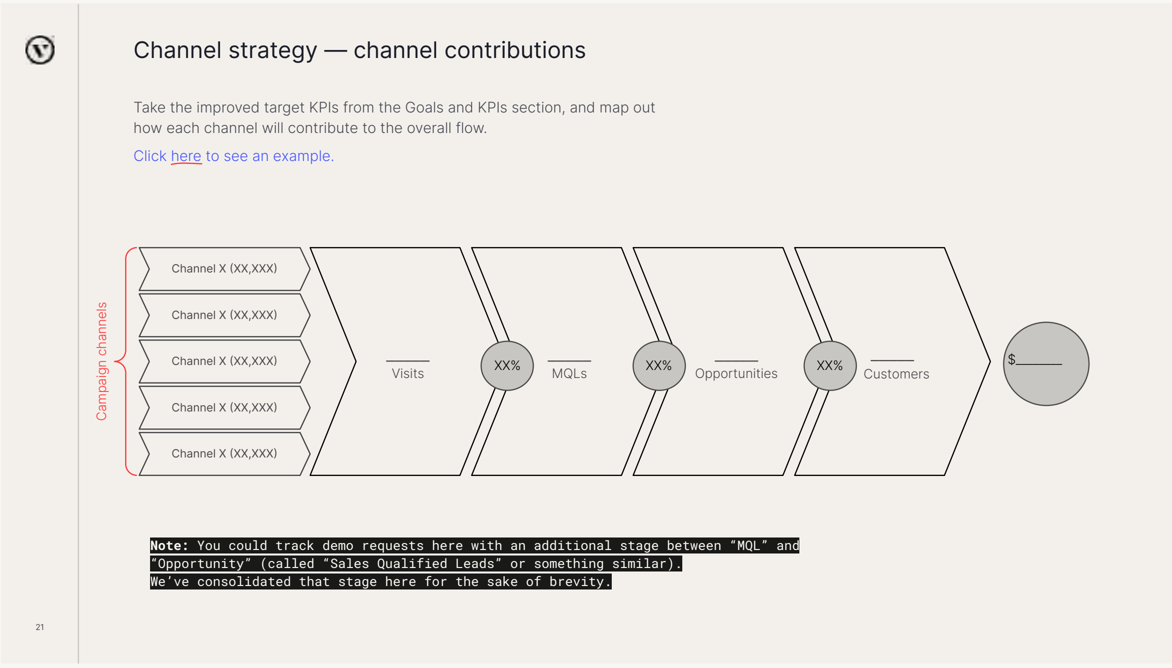
Exercise #6

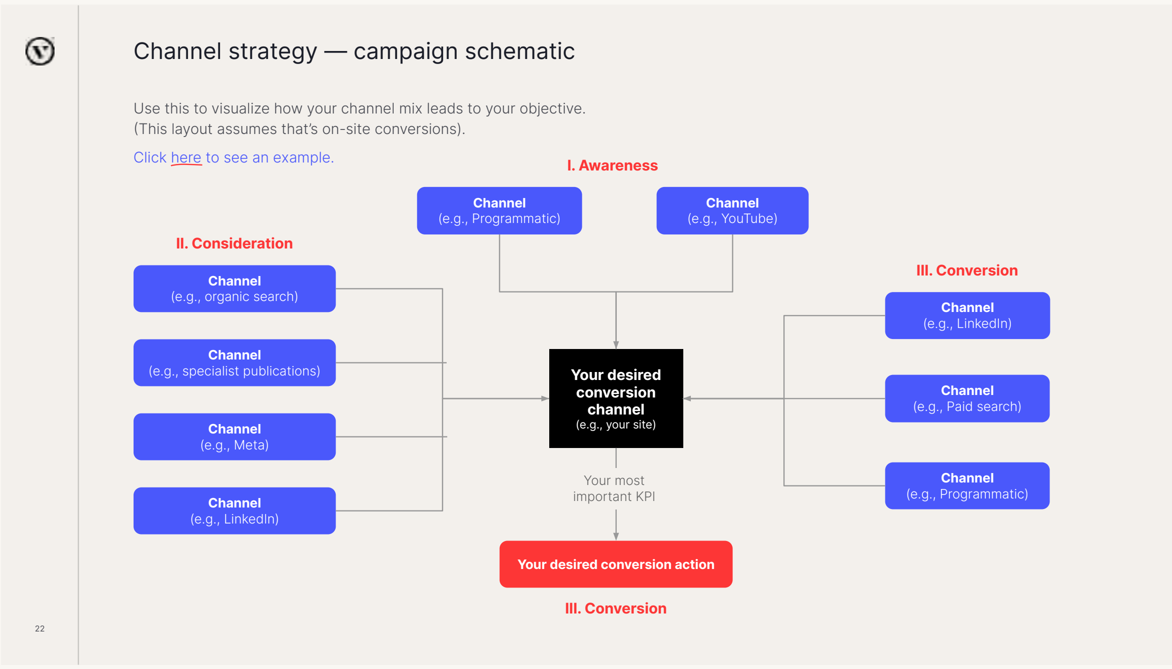
Develop your channel strategy

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 21-22 in exercise book





Section 8

Sales and marketing alignment

Sales and marketing alignment

In most B2B companies today, Sales and Marketing aren't on the same page (they're lucky to bump into each other in a PowerPoint deck).

Marketing has spent years indiscriminately blasting out expensive content to strangers that leaps from "Hello, nice to meet you" to "Buy our thing" at whiplash-inducing speed.

Anyone who so much as glances at an ad is flagged as an MQL and thrown onto an ever-growing sales qualification junkpile that (unsurprisingly), Sales has learned to ignore in favor of their own outreach.

This experience doesn't just suck for everyone (customers included) — it's hurting revenue.

A marketing blueprint brings Sales and Marketing back together

The root of this misalignment is a chronic focus on short-term revenue at the expense of longer term demand generation.

Only 5% of B2B buyers in any market are actively looking to buy at any one time. But laboring under huge pipeline targets (and with no shared vision to meet them), Sales and Marketing teams myopically pursue this segment while ignoring 95% of potential future buyers.

A marketing blueprint is an opportunity to rebuild the sales and marketing relationship around a plan designed to address 100% of the market — by reaching clear agreement on a few things:

A shared vision that connects brand to revenue

A long-term plan to build a relationship with 95% of the market not currently looking to buy, that earns the right to sell when the time is right

When things will happen

A campaign timeline — when ads and content go live, when the first leads will be generated, when those leads will be assigned to Sales and so on.

What a lead looks like

A mutual definition of how to validate the credibility and maturity of leads based on engagement — with ads, content, touchpoints, etc.

Who owns what?

What is the expected journey for leads and who is responsible at each stage?

What the sales sequence should be

What is the right cadence of sales outreach for the audience in question? How often should sales staff get in touch, and in what channel?

Example #7

MooSoft builds alignment

MooSoft used the marketing blueprint exercise as an opportunity to get its sales and marketing teams aligned behind a shared plan.

01

First, the MooSoft CMO developed the plan in partnership with the VP of sales.

Everything from the goals and KPIs, ICP, creative platform and channel strategy was co-created, to ensure buy-in and dissemination across marketing and sales teams.

02

Second, the pair established some key processes to define the dependencies and obligations between the two teams:

Lead criteria and stages

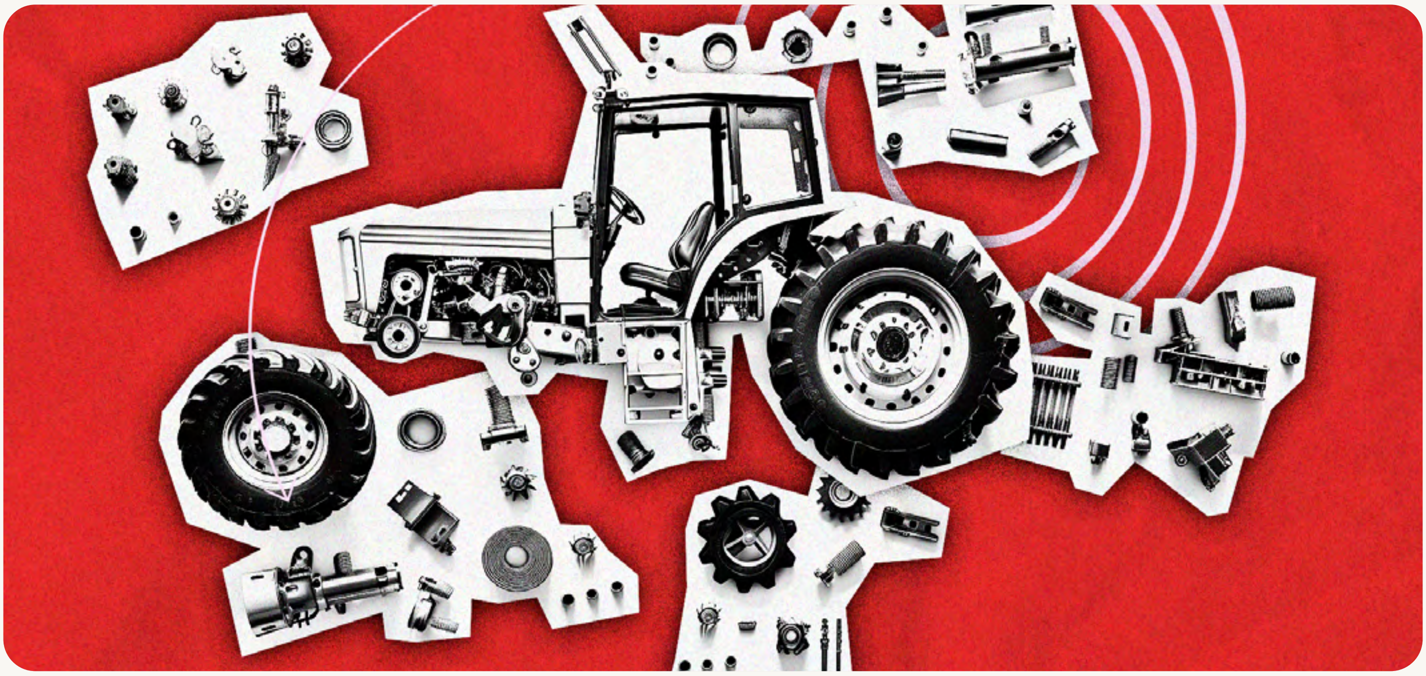
That define how prospects become leads, how they move through the funnel, and the actions (and timeframes) that Sales and Marketing take at each stage.

A campaign timeline

Outlining when each stage commences and key moments of interaction between sales and marketing

A sales sequence

That explains how sales teams can use the content within the funnel to have more valuable conversations with prospects.



Example #7

MooSoft builds alignment

Here's what those exercises looked like for MooSoft.

	Funnel stage	Definition	Owner	SLA action	SLA timings
Success path	Lead	The top of our funnel. Any lead being created in the CRM for the first time is entered as Suspect. Person may or may not be aware of us (depending on source).	Marketing	Automated via HubSpot	N/A
	Lead (MQL)	Marketing Qualified Lead. A lead who either: A. submitted a Contact Us form on our site or B. showed sufficient engagement levels with our marketing channels (visited the website, opened our emails, attended an event, etc.)	GTM Team	Automated via HubSpot	24 hours
	Lead (SQL)	Lead has been converted, qualified-In, and will show as a Contact instead of a Lead in SFDC.	GTM Team	Convert Lead to Contact	5 business days
	Opportunity	The lead is either attached to an existing opportunity or a new one is created.	Sales	Convert to Contact, create Opportunity	N/A
	Opportunity won/lost	Opportunity status is updated to Won/Lost based on negotiation outcome.	Sales	Maintain opportunity up to date with status, pipeline and revenue figures	N/A
Detours	Disqualified	Lead has been disqualified and will no longer be contacted by anyone.	Sales	Update Lead Status in CRM to Disqualified	N/A
	Existing Customer or partner	Lead was from existing customer or partner account.	Named Individual	Update Lead Status in CRM to Disqualified — attach to right account	N/A

Example #7

SLA: Campaign Timeline for Sales

This is an outline of program timings for Sales and when we expect them to get involved.

Paid advertising live

Oct–Dec	January	February	March	April

Introductory steps

Campaign planning, production and implementation

Launch activities

- Ads go live
- First leads generated
- Lead nurturing begins

First sales activities

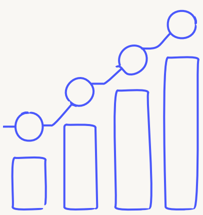
- First scoring MQLs assigned to Sales
- Very first campaign leads reach the bottom of the sales sequence

First qualified leads

- First SQLs identified
- Scoring MQLs continue to be assigned to Sales

End of advertising, ongoing sales activities

- Paid advertising completed
- SQLs continue to be identified



Example #7

SLA: Campaign Timeline for Sales

Follow-up best practices: Sales sequence example

What does a good sales outreach sequence look like for marketing leads:

Day 1
Email/InMail — Intro note referencing one or two highlights from the custom Farmstack Fragmentation benchmark report.

Day 3
Email in the morning, call in the afternoon. Email references the benchmark report and asks if they had any feedback or thoughts and if they agreed with points made. Call will then be focused on that area should they get through.

Day 5
Call in the morning, call with a voicemail in the afternoon. Always good to try at different times of the day — voicemail should maintain the same message/theme that the emails/content have spoken around.

Day 6
Add the lead as a contact on LinkedIn with a customized invite that references previous interactions and suggests you can potentially add value by being connected.

Day 7
Email in the morning, call in the afternoon with a voicemail. It could be a good idea to reference the customer stories from 8 New Metrics of Supply Chain Efficiency to demonstrate how MooSoft has already driven success in the area(s) raised in the findings from the custom benchmark report. This email is a vital stage in driving a response or better awareness of the pain point across the org.

Day 10
Engage with content the contact or account is sharing or engaging with on LinkedIn.

Day 12
Email and call in the morning. This is the Fear of Loss / Break-up email / cadence point where the team are offering one more follow-up to see if it's of interest and pushing for a reference to another team member if they can help with that.

Exercise #7

Sales and marketing alignment

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 24-25 in exercise book

Sales and marketing alignment — sales sequence

What does a good sales outreach sequence look like for marketing leads?

Click here to see an example.

- **Touchpoint 1:**
- **Touchpoint 2:**
- **Touchpoint 3:**
- **Touchpoint 4:**
- **Touchpoint 5:**
- **Touchpoint 6:**
- **Touchpoint 7:**

24

Sales and marketing alignment — owners and responsibilities

What's the expected journey for leads and who's responsible at each stage?

Click here to see an example.

	Funnel stage	Definition	Owner	SLA action	SLA timings
Success path	Lead				
	Lead (MQL)				
	Lead (SQL)				
	Opportunity				
	Opportunity won/lost				
Detours	Disqualified				
	Existing customer or partner				

25

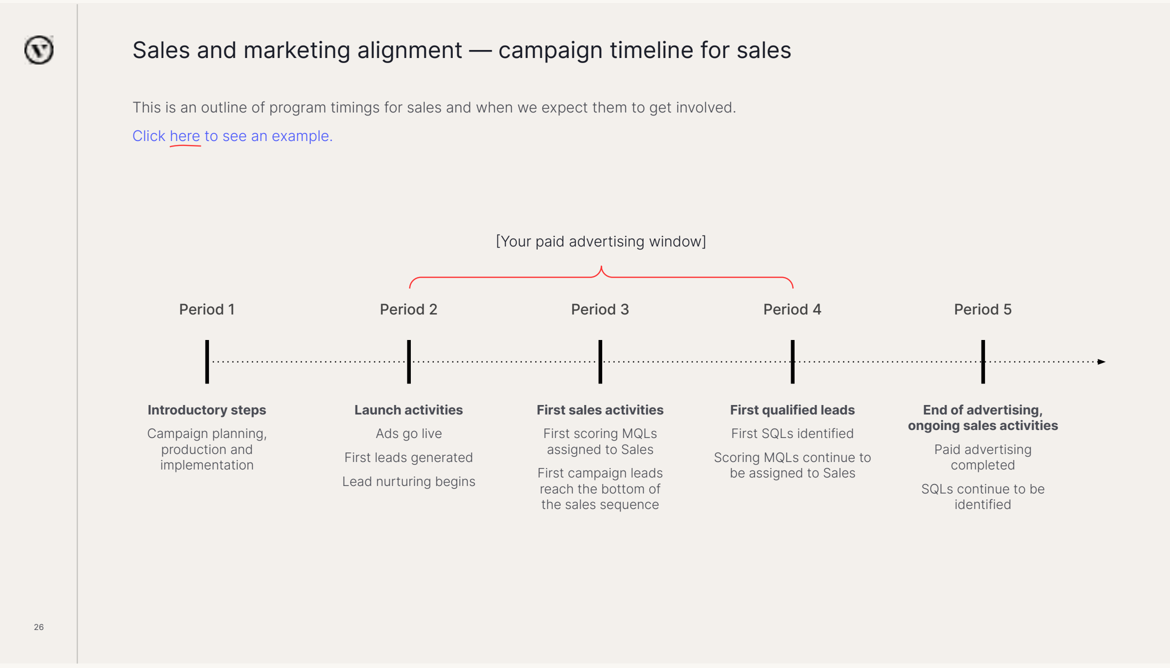
Exercise #7

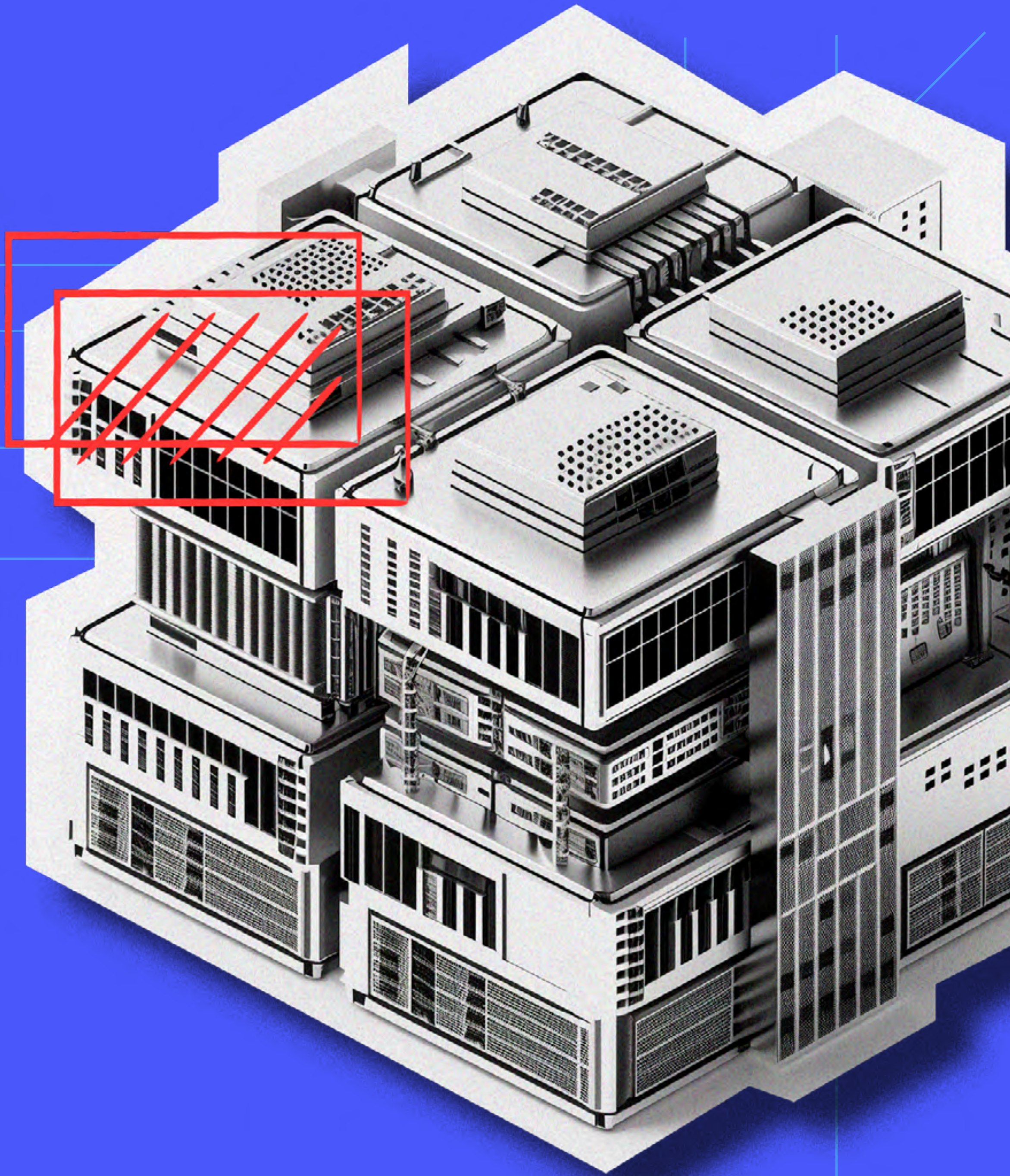
Sales and marketing alignment

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slide 26 in exercise book





Section 9

Technical considerations

Technical considerations

Your MarTech stack is the real biting point of your marketing blueprint. Can the systems you use deliver the plan you've made?

The first time you go through this process, the answer is almost certainly "no" — at least not without some tweaking. This section is about how to setup your marketing stack to implement your blueprint.

There are stipulations. For instance: every organization is unique, so this isn't an exhaustive guide or comprehensive checklist.

Instead, this is a guide to conduct a MarTech assessment to understand what tools are in place, understand any known issues or gaps, and address potential problems that could impact the execution of the campaign or the reporting around it.

While every stack is different, most companies will have common MarTech elements to consider:

Your MarTech stack

You need to validate your sales and marketing tools can support your plan (check out this post for a deep dive on how to audit your MarTech stack).

Do you have the right tools to deliver the campaign? What about the internal resources and skills to then run and report on the process?

Your website pixels

To measure accurately, you need to ensure you're correctly tagging your website (e.g., through GTM) so you can track which conversions are coming from which channel.

UTM tagging

Link tagging is one of the most overlooked steps in campaign configuration. While some platforms (like HubSpot) automate some of this process, you should take care to establish and implement a consistent UTM convention across all channels.

Data privacy and compliance

You need to apply all the same compliance controls that govern your site and marketing practices to the campaign in your blueprint.

Load testing and performance monitoring

You should ensure your website and landing pages can handle increased traffic during the campaign. Assume your own wild success for a moment and set your site and landing pages up to cope with that.

Let's take a look at the technical considerations MooSoft thought about to prepare for their campaign.

Example #8

MooSoft's technical considerations

The MooSoft team looked at the systems across their marketing stack and followed a common checklist of considerations to support their campaign:

01

The MarTech stack

MooSoft began by looking at the core systems underpinning their marketing operation.

I Marketing automation

They deployed HubSpot to take care of repetitive tasks like email campaigns, social media posts, and ad management efficiently.

II CRM integration

They integrated their CRM system with marketing tools to facilitate seamless data flow and ensure that customer information is always accurate and up-to-date.

III Email deliverability

They used an email verification and list-cleaning tool to maintain a healthy email list and improve deliverability. They also implemented authentication protocols like SPF, DKIM and DMARC to avoid spam filters and ensure their emails reached the intended recipients.

IV Content management system (CMS)

They checked that their CMS could handle the content requirements of the campaign, including blogs, landing pages and multimedia elements. They implemented SEO best practices within the CMS to improve the campaign's visibility in organic search results, driving more traffic to the main MooSoft site.

V Analytics and reporting

They set up comprehensive analytics in their automation platform (plus one bespoke dashboard) to track key performance indicators like conversion rates, click-through rates and ROI.

Example #8

MooSoft's technical considerations

02

The website pixels

MooSoft used the following pixels to ensure accurate tracking across different channels:

I **LinkedIn Insight Tag**
To track conversions, retarget website visitors and provide demographic information on LinkedIn members who visited the MooSoft website.

II **LinkedIn conversion tags**
For any gated assets or conversion forms (e.g., contact, demo).

III **Meta Pixel**
To track page views and actions on meta sites and apps. Setting up the Conversions API (server-to-server) ensures greater flexibility and reliability in tracking post-iOS14.

IV **Global site tag (for programmatic advertising)**
To track page views on all site pages. Creating Floodlight Tags helps to track specific actions taken on the site.

V **HubSpot/Marketo Munchkin code**
To track anonymous and known visitors to the MooSoft site as well as form conversions and website usage from CRM contacts.

03

UTM tagging

MooSoft used UTM tagging to track conversions and source attribution across the different channels used in their blueprint program. They used the following recommended base convention:

```
utm_source=[channel]
utm_medium=paid
utm_campaign=[campaign name]
utm_content=[link type or asset reference]
```

Example

```
https://moosoft.com/farmstack-fragmentation-benchmarker?utm_source=LinkedIn&?utm_source=LinkedIn&utm_medium=paid&utm_campaign=grp_mc_global_awareness_1&utm_content=picture3
```

Example #8

MooSoft’s technical considerations

04

Data privacy and compliance

MooSoft implemented robust policies and procedures to ensure their campaign complied with the same GDPR and CCPA regulations their site and marketing activities were subject to.

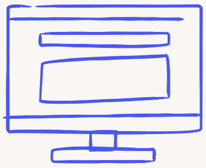
They also used the same data encryption and anonymization techniques to protect user information, and supplied full transparency around data usage policies to obtain the necessary consent from their audience.

05

Load testing and performance monitoring

When it comes to load testing and performance monitoring, **MooSoft** took the cautious approach and prepared to exceed their wildest success metrics.

Poor site performance is possibly the worst (or at least most frustrating) reason to fall short of your traffic engagement and conversion rate targets. It never hurts to assume the best when ensuring your pages can handle the increased traffic of your campaign.



Exercise #8

Your technical considerations

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 28-29 in exercise book

Technical considerations checklist ✅
MarTech and website performance (1/2)

What operational elements within your marketing and sales infrastructure need to be considered for the successful implementation of this campaign?

Tailor this example checklist as needed:

Click here to see an example.

Area	Core task	Key items for consideration	Status	Action
MarTech Stack	Audit current tech stack, identify gaps in capabilities or skills.	Is a **marketing automation platform** effectively deployed to support campaign execution (email, landing pages, forms, workflows and general automation)?	[Not started / In progress / Complete]	
		Is a **CRM** in place for capturing prospect/customer data and to allow Sales to develop new opportunities?	[Not started / In progress / Complete]	
		Is our **email deliverability** up to standard, for key authentication protocols like SPF, DKIM and DMARC?	[Not started / In progress / Complete]	
		Can our **CMS** handle the content requirements of the campaign (e.g., blogs, content pages, multimedia elements) as well as SEO visibility and growth?	[Not started / In progress / Complete]	
		What's our **analytics and reporting** tool of choice? How are we planning to provide visibility to the organization for the key metrics involved in this program?	[Not started / In progress / Complete]	
Website Tracking	Does our website include the right tags (e.g., through GTM) so we can track what conversions are coming from which channel?	Check relevant **tags** depending on which channels are / will be in place. For example, LinkedIn Insight and Conversion Tag, Meta Pixel, HubSpot/Marketo Munchkin code.	[Not started / In progress / Complete]	
UTM Tagging	Are we tagging all campaign links (either manually or in bulk)?	Define a **UTM convention**, roll this out across all links (email, paid media, organic social, etc).	[Not started / In progress / Complete]	

28

Technical considerations checklist ✅
MarTech and website performance (2/2)

Click here to see an example.

Area	Core task	Key items for consideration	Status	Action
Website Performance and Technical SEO	Is our website optimized for the latest best practices on web performance, accessibility and technical SEO?	**Page Load Speed:** Are all pages loading within an acceptable time frame? Check with tools like Google PageSpeed Insights or GTmetrix.	[Not started / In progress / Complete]	
		Mobile Performance: Is the website optimized for mobile devices? Ensure responsive design and check performance on various devices.	[Not started / In progress / Complete]	
		Caching Strategies: Are effective caching strategies implemented (e.g., browser caching, server-side caching)? Consider implementing services like Cloudflare to automate some of the heavy lifting.	[Not started / In progress / Complete]	
		Image Optimization: Are images optimized for faster loading? Use compression plugins (e.g. within WordPress) or automate through tools like Cloudflare.	[Not started / In progress / Complete]	
		Minification: Are CSS, JavaScript and HTML files minified to reduce load times?	[Not started / In progress / Complete]	
		Core Web Vitals: Are Core Web Vitals (Largest Contentful Paint, First Input Delay, Cumulative Layout Shift) optimized? Check metrics in Google Search Console or other tools.	[Not started / In progress / Complete]	
		Content Delivery Network: Is a CDN being used to improve load times for global users? Check CDN configuration and coverage.	[Not started / In progress / Complete]	
		Technical SEO Audits: Are SEO best practices followed, including meta tags, alt attributes, header tags and structured data? Use tools like SEMrush or Ahrefs to identify any gaps.	[Not started / In progress / Complete]	

29

Exercise #8

Your technical considerations

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slides 30-31 in exercise book

Technical considerations checklist ✅
Privacy and compliance (1/2)

These recommendations use GDPR as a reference for what an acceptable data protection policy must look like. Always validate these guidelines with your own Legal and Privacy departments, depending on the applicable data protection laws in the markets you operate in.

Click here to see an example.

Requirement	Approach	Area	Status	Action
Our data needs to be collected in a transparent manner in relation to individuals.	We should add two **checkboxes to every form**, along with a short statement asking the user for permission to be included in our marketing communications.	Website frontend	[Not started / In progress / Complete]	
	The above text should include **a link to our website Terms and Conditions page and to our Privacy page**. These pages should cover the purposes of the processing for which the data is being collected.	Website frontend	[Not started / In progress / Complete]	
	The user's behavior with the above checkbox will determine our **ability to communicate** with that person, or not. Preference should be captured on the backend of your CRM.	Website backend / CRM	[Not started / In progress / Complete]	
Our website needs to allow visitors to opt out from web tracking.	We can manage consent via **a cookie banner**.	Website frontend + backend	[Not started / In progress / Complete]	
Our data needs to be kept only for as long as necessary and for the purposes for which the personal data are processed.	Personal data must be kept "no longer than is necessary for the purposes for which the personal data are processed." This implies there's a time limit on how long customers' data can be kept. What should be our **data retention period**?	Website frontend + backend	[Not started / In progress / Complete]	

30

Technical considerations checklist ✅
Privacy and compliance (2/2)

Click here to see an example.

Requirement	Approach	Area	Status	Action
Our data can only be collected for specific, explicit and legitimate purposes and not processed beyond those.	We should allow people to **control** the type of communications they want to receive from us through a **marketing preferences page**. From a marketing perspective, this can lead to more relevant, better communications with our prospects and customers. See an example page.	Website frontend	[Not started / In progress / Complete]	
	Allow users to **remove themselves** from our database	Website frontend	[Not started / In progress / Complete]	
Our data needs to be adequate, relevant and limited to what's necessary in relation to the purposes for which it is processed.	Preference page need to be complemented with a **backend process** that allows segmentation of who's subscribed to what. We should then use that information to define any ongoing marketing communications if required.	Website backend / CRM	[Not started / In progress / Complete]	

31

Section 10

Reporting

Reporting

Every good marketing plan should be able to measure and report on where it succeeds, and where it needs to improve. We'll talk about how to do that in a moment.

The great news is you already know what you need to achieve. You know what good looks like because it's enshrined in your now complete and shiny set of KPIs.

Your first goal will be to understand how your campaigns are performing against the commercial targets and conversion rates you set yourself — overall and on a per-channel basis.

To do that you'll need to create and test your reporting infrastructure before the campaign kicks off. You must tune your system to focus on the numbers that matter.

Lay out your goals and targets in one place before worrying about the software or platform. You can then choose the best option from your reporting stack of analytics and CRM/MA tools before tackling the emerging challenge of bringing all the data sources together.

Measuring creativity

The beauty of a marketing blueprint is that it uses custom metrics to measure how creativity galvanizes people towards a commercial action along a nuanced buying journey.

And that's important when you're advocating for a broader range of brand-led and sales activation content — you need to be able to track how the stuff that might not have an immediate commercial action can build into an eventual sales conversation.

Custom metrics to translate engagement into impact

There's nothing wrong with using standard performance metrics as a baseline. But the gold standard is to prove a scientific link between how your marketing inspires prospects to take action and what that action is worth in terms of revenue.

To get there, you need to answer specific questions like:

- **Who do we want to take the action?** (Who in our target audience is most relevant?)
- **What actions do we want them to take?** (What defines a galvanized interaction?)
- **When do we think that action will take place?** (Where and when should that galvanized action take place?)
- **What's the value of said action?** (What is the revenue impact of that galvanized action?)
- **How can we influence that action?** (The most important part — how does creativity galvanize desired behavior?)

Reporting

We've developed some custom performance metrics to answer those questions. [You can read about all of them in this post] — but you can build a pretty advanced blueprint with just the following:

Audience

Who's taking the action?

1 **Critical User Volume**
= (current traffic / target traffic) *100
How many users do we need to reach for our content campaign to deliver a return? What is the critical mass that will drive the galvanized experiences needed for commercial outcomes?

2 **Target Audience Success**
= (target audience / total audience) *100
How many users fit our target audience? We need to provide some proof that we're reaching the right groups via our audience analytics and set up.

Actions

What actions are we looking to inspire?

3 **Galvanized Engagement**
= (page views / unique page views) *average time on page
How many visits deliver an experience that drives both engagement and return users? This relates to the overall experience of the content.

4 **Defined Customer Journeys**
= (defined journeys / total ongoing journeys) *100
How many users take a planned commercial next step (i.e., visiting a product page, conversion page or demo request form).

5 **Engaged User Conversion**
= engaged conversion rate : average conversion rate
What is the conversion rate of people who engaged with content as opposed to site averages? We'd hypothesize that galvanized users will convert more than the others at a very favorable ratio.

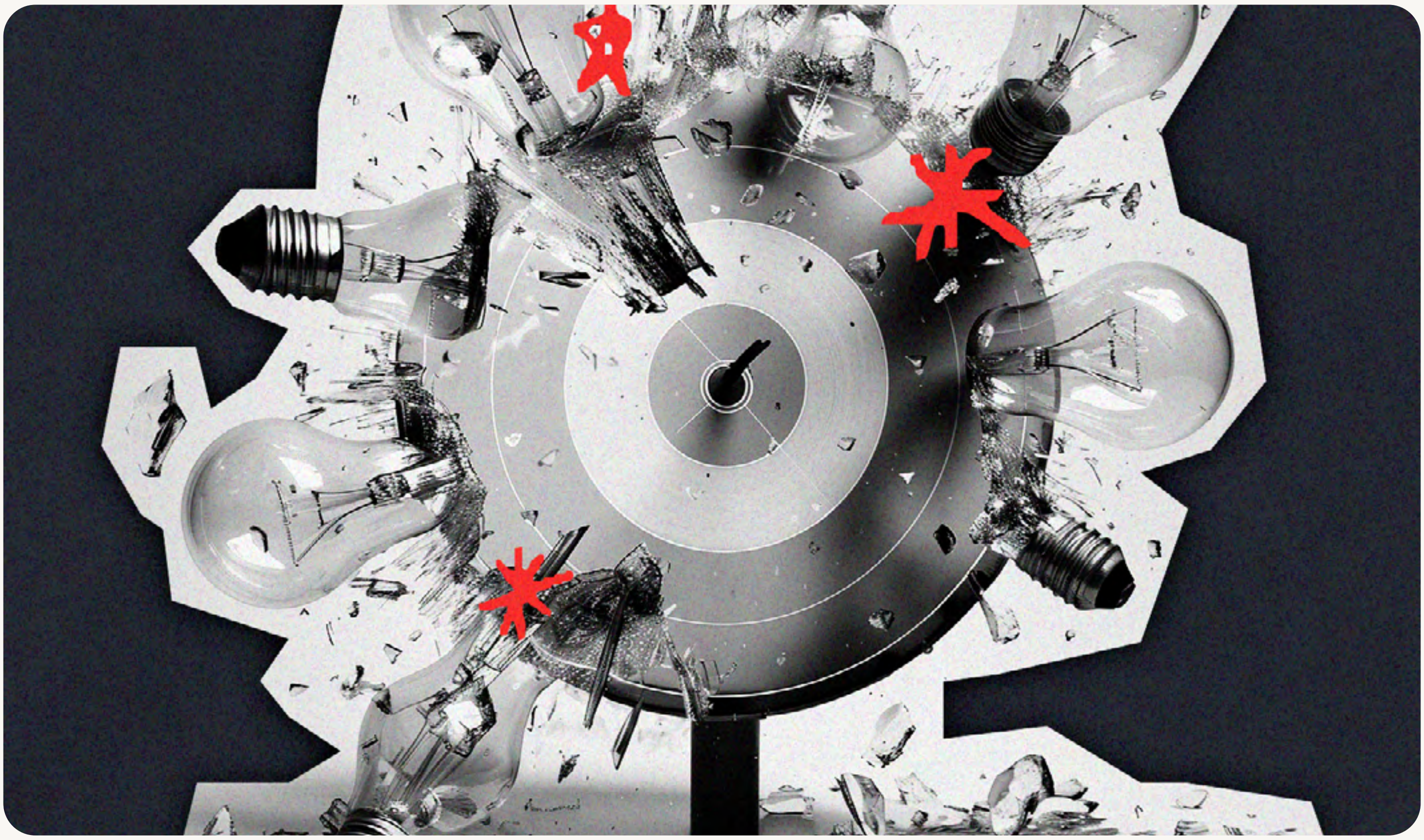
Reporting

Impact

What's the value of the action?

6 **Content Value**
= projected revenue + total goal value / unique content views
In commercial user journeys you need to understand the value of conversions. If you can put a value on your core conversions (a focus for us), then you can measure the impact of content directly.

7 **Content Opportunity Rate**
= total opportunities / content experiences *100
What proportion of opportunities result from content experiences? And how many content experiences do you see per opportunity? And more specifically, which content experiences drive opportunities that tend to land vs. those that don't?



Let's look at how MooSoft used custom metrics to understand the creative impact of the campaign.

Example #9

MooSoft's reporting mechanisms

One month into the campaign, the MooSoft campaign strategist started to look at some custom metrics to build a picture of the performance so far.

Audience

Who's taking the action?

1 **Critical User Volume**
= (current traffic / target traffic) *100
In the first month, the MooSoft campaign attracted 12,000 visits to MooSoft.com out of an overall target of 100,000.

CUV = 12%

Pretty good for one month!

2 **Target Audience Success**
= (target audience / total audience) *100
Next, they calculated that 4,300 of 12,000 web visitors and 19 of 50 form submissions in the first month resembled their target audience (by measuring how many web visitors and benchmarker sign-ups matched sample data from an enrichment platform like ClearBit).

TAS = 36% for web traffic and 38% for content sign-ups

A little low (and plenty of room to improve the visit to form conversion rates).

Actions

What actions are we looking to inspire?

3 **Galvanized Engagement**
= (page views / unique page views) *average time on page
MooSoft measured how many of those visits drove both engagement and return users.

16,500/12,000*61 seconds

Galvanized Engagement score = 84. This is a decent baseline to improve over time — with more return visits and optimizations to inspire a longer experience.

4 **Defined Customer Journeys**
= (defined journeys / total ongoing journeys) *100
Next, MooSoft calculated that 691 of the 4,811 visitors to their Agribusiness Guide to AI SEO hub went on to take a commercial action (in this case, either visiting a product page or completing the form on their demo page).

DCJ = 14%

A fantastic hit rate of galvanized actions.

Example #9

MooSoft’s reporting mechanisms

Actions
What actions are we looking to inspire?

5 **Engaged User Conversion (EUC)**
Engaged conversion rate : average conversion rate
MooSoft compared the conversion rate of people who engaged with their content against the site averages, and found that galvanized users were converting significantly more than the average.

EUC = 2.6: 1.2

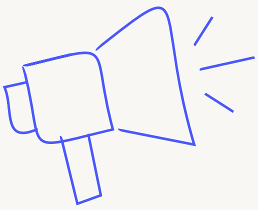
(Effectively 2.2:1) — a great result!

Impact
What’s the value of the action?

6 **Content Opportunity Rate (COR)**
Content driven opportunities / total opportunities *100
Finally, MooSoft calculated that 2 out of the 26 commercial opportunities from the previous month had engaged with the Farmstack Fragmentation benchmarker.

COR = 8%

Of opportunities influenced by creative work (or with an average deal size of $100k, potentially $200k of pipeline).



Exercise #9

Your reporting mechanisms

The exercise will create a clear reporting matrix that can be set up and tested before your campaign goes live.

Build out your target matrix and use it, in advance, to build the tags and reports required to measure success long before your campaign goes live.

The goal is to chart your journey towards success. Most teams have poor reporting frameworks, which means panic sets in because a lack of data is perceived as a lack of success.

Your challenge is to blend data from disparate sources into a manageable campaign framework based on the outcomes you need to see.

Slide 33 in exercise book

Reporting and tracking against targets

Your metrics — which should all support your KPIs — can now be set up to be reported before you go live. Add to reporting platforms and bring into a dashboard.

Click here to see an example.

Awareness	Acquisition	Engagement	Conversion
Build upstream awareness	Acquire new traffic to site	Improve content engagement	Increase pipeline
Focus			
Ad engagement	Site visitors	Engagement	Form fills
Metrics			
1. Google Impressions (#) 2. LinkedIn Impressions (#) 3. Meta Impressions ((#) 4. Organic Impressions (#) 5. Programmatic Impressions (#) 6. YouTube Impressions (#) 7 Google CTR (%) 8. LinkedIn CTR (%) 9. Meta CTR (%) 10. Programmatic CTR (%)	1. Critical User Volume (#) 2. Cost Per Paid Visit ($) 3. Target User Success (%)	1. Successful Journey Rate (%) 2. Galvanised Engagement (#) 3. Defined User Journeys (#) 4. Engaged User Con Rate (#)	1. Leads (#) 2. Lead-to-Opportunity Rate (%) 3..Content Opportunity Rate 4. Pipeline (#) 5. Customer Acquisition Cost ($)
KPIs			
1. Target > ______ 2.Target > ______ 3. Target > ______ 4. Target > ______ 5. Target > ______ 6. Target > ______ 7. Target > ______ 8. Target > ______ 9. Target > ______ 10. Target > ______	1. Target > ______ 2. Target > ______ 3. Target > ______	1. Target > ______ 2. Target > ______ 3. Target > ______ 4. Target > ______	1. Target > ______ 2.Target > ______ 3. Target > ______ 4. Target > ______ 5. Target > ______

33

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Section 11

Next steps and owners

Next steps and owners

Holy hell, you've done it. Your marketing blueprint is done. Pages and pages of the thing, stretching out before you. Step forward. Take a bow.

Congratulations: You've reached the starting line.

Now the work really begins

As much work has gone into your marketing blueprint, it's going to take a lot more sustained effort to bring it to life.

Executing a marketing blueprint is a full-time job (and often, more than one). You need to:

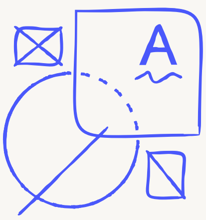
- **Configure and optimize your marketing stack**
- **Optimize your site and content for search**
- **Set up and execute a paid media plan**
- **Capture and report on performance analytics**
- **Synthesize and implement actionable insights and optimizations**

This is where a lot of organizations fall into the ambition trap and create a grandiose plan they're unable to deliver.

Or worse, they get the plan over the starting line but then neglect to optimize it over time. Marketing blueprints are living things — they're valuable because they evolve.

The list above implies skills from a range of separate disciplines (across SEO, paid media, marketing ops, data analytics, strategy, creative and more). You might be able to crunch some of that down into a few jack-of-all-trades roles. But this is where working with a team of specialists can really pay off.

This is as hard a sell as we're going to make here, but if you've started a plan that excites you but you haven't got the skills in-house to deliver it: **we should talk**.



OK, enough of that.
Let's check in with MooSoft.

Example #10

MooSoft activates the plan

After creating, launching and promoting their content program, the MooSoft data team created a report of the first 20 sign-ups for its Farmstack Fragmentation benchmarker.

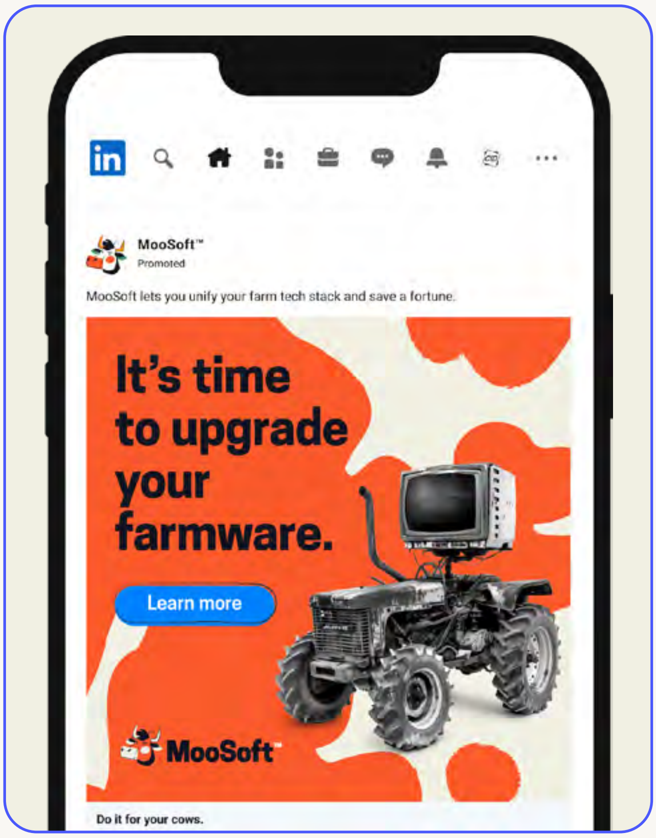
The campaign strategist investigated and found that the leads didn't align with the sweet spot identified in the ICP — a few were too junior (operations managers rather than heads of operations) and a few more were from smaller organizations below the stated $20M revenue threshold.

In response, the paid media team created exclusions around specific junior titles, and raised the lower threshold on the number of employees in target organizations from 250 to 400 to try and increase the efficiency of their ad spend.

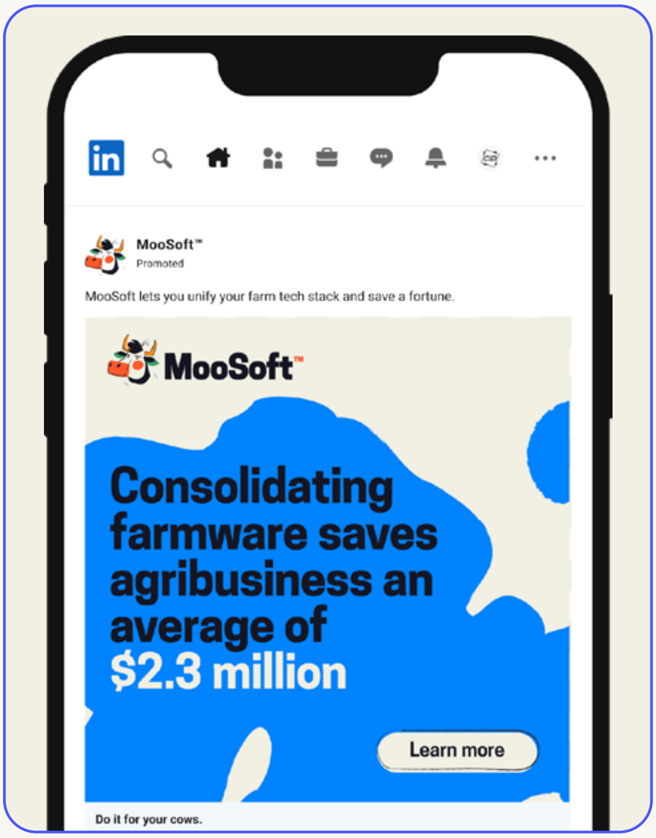
The paid media team also noticed that the click-through rate on one of the DV360 ads was significantly underperforming relative to others.

They passed this feedback on to the creative team, who made some improvements based on some of their better-performing ads. They added a compelling data point and sharpened the copy to make the value prop clearer.

Option A



Option B



Exercise #10

Creating your activation plan

Follow the link to access the exercise in your blueprint exercise book.

Access the exercise book

Slide 35 in exercise book

Activation plan in one slide

No example for this exercise — now it's over to you!

Area	Core task	Agreed action	Owner	Next step
1. The universal audit	Take the digital marketing questionnaire, perform deep-dive audit.			
2. The context	Build a consolidated list of key hypotheses and baselines.			
3. Goals and KPIs	Establish specific, measurable, achievable success metrics.			
4. Audience	Map out your ICP in detail.			
5. Creative platform	Plan and develop the content that will move the needle with your target audience.			
6. Channel strategy	Outline where your target audience spends time and how to reach them there.			
7. Sales and marketing alignment	Align on a shared model of collaboration between Sales and Marketing.			
8. Technical considerations	Run through critical operational questions relating to your MarTech stack, site performance and privacy controls.			
9. Reporting	Measure where your plan has succeeded and where it needs to improve.			

35

Section 12

Conclusion

Conclusion

Whew.

If this is your first run through of the book: Well done. Now the fun really begins — it's time to gather your stakeholders and start working through the exercises.

If this is your second run through the book: **Congratulations**. The exercises you've completed in the exercise book should add up to a GTM-ready blueprint.

If you've run into obstacles or you're finding this hard — don't sweat it. This stuff is hard. But making good stuff always is.

If you're stuck, get in touch — we love talking to smart marketers about this stuff.

If you've completed a blueprint using this book, we want to hear about it — contact us here to brag, ask questions, make suggestions or get advice.

Talk to us