



THE

S.M.A.S.H.

DEMAND GENERATION PLAYBOOK

Sales and Marketing Achievement Through Sustainable Habits

A practical guide for B2B demand generation managers who are tired of lead generation theater and ready to build a growth engine that actually produces pipeline.

A series of thick, parallel orange lines that start as straight horizontal lines on the left and curve into a large, rounded shape on the right, resembling a stylized 'U' or a path.

marketlogic
ideas meet results



What You Will Find in This Playbook

This playbook is organized into six sections. Each section builds on the previous one. Read it in order the first time, then use individual sections as reference material.

- 01 The Problem: Why Lead Gen Is Failing You**
The zero-click reality and why your website is no longer the center of the universe
- 02 Foundation: Get Aligned Before You Execute**
The lead qualification contract and how to stop the sales vs. marketing war
- 03 Know Your Buyer: ICP Development for Real Teams**
The AI avatar method and focusing on who actually matters
- 04 Content Engine: Big Rock + Atomization**
Creating LLM-ready content and pushing it to the edge
- 05 Metrics That Actually Matter**
Pipeline velocity, CAC, and why MQLs are lying to you
- 06 The 90-Day Sprint**
A phased implementation that shows progress before anyone loses patience



SECTION 01

The Problem: Why Lead Gen Is Failing You

Let us be direct with you: the demand generation playbook that worked five years ago is broken.

If you are reading this, you probably already know something is wrong. Traffic is declining. Paid campaigns are burning through budget without producing pipeline. Sales is complaining about lead quality. And despite all the activity, revenue targets feel further away than ever.

You are not imagining it. The game has fundamentally changed.

The Zero-Click Reality

Read that last point again. Companies are seeing their search rankings improve while their click-through rates collapse. This is not a failure of SEO execution. It is a fundamental shift in how search works.

Google's AI Overviews, featured snippets, and knowledge panels are answering questions directly in the search results. Users get what they need without ever visiting your website. And this trend is accelerating, not slowing down.

The Zero-Click Crisis in Numbers

Here is the data that should reshape how you think about demand generation:

60%

of Google searches now end without a single click to any website

42%

AI Overviews now appear on 42% of searches and trigger 83% zero-click rates

360

Only 360 out of every 1,000 searches result in clicks to the open web

2%

B2B sites report rankings improving while CTR dropped from 2% to 0.2%

Your Website Is No Longer the Center of the Universe

For the past decade, the demand generation playbook was simple: create content, optimize it for search, drive traffic to your website, gate valuable assets, capture leads, and hand them to sales.

That playbook assumed one thing: that your website was where buyers went to learn.

It is not anymore.

Today's B2B buyers research in places you cannot track: LinkedIn feeds, Slack communities, Discord servers, Reddit threads, podcasts, YouTube videos, and private conversations with peers. By the time they visit your website, they have already formed opinions about your product, your competitors, and whether you are worth talking to.

If you are waiting for them to find you through Google, you are already too late.

Push Content to the Edge

The solution is not to abandon your website. It is to stop treating it as your primary distribution channel.

Instead of pulling buyers to your site, you need to push your content to the edge, meaning the places where your audience already spends time. Social media, forums, communities, podcasts, webinars, and anywhere else your buyers gather to learn and discuss.

This is not a small tactical shift. It requires rethinking your entire content strategy, distribution model, and how you measure success.

The days where you would rank on Google and be satisfied are over. If you rely solely on your website to connect with your audience, you will die a slow death.

The Opportunity in the Chaos

Here is what the doom-and-gloom statistics miss: buyers are always looking for better options. Every buyer is experiencing FOMO about the latest technology choices. Even when they think they know all the options, they will still research new solutions, new pricing, new everything.

This means there is always an opportunity to educate buyers about your solutions. It is not easy, but it is not impossible to win their business.

The teams that win will be the ones who show up consistently in the places buyers are researching, with content that actually helps them make decisions.

That is what this playbook will help you build.





SECTION 02

Foundation: Get Aligned Before You Execute

Before you build a single campaign or write a single piece of content, you need to fix the foundation. And for most teams, that foundation is broken.

The most common symptom? Sales and marketing fighting about lead quality.

The Lead Quality War

You know the script. Marketing delivers leads. Sales says they are garbage. Marketing points to the numbers showing they hit their MQL targets. Sales points to the closed-won numbers showing those leads never converted. Everyone blames each other. Nothing changes.

This is what happens when marketing works in isolation from sales goals. Marketing optimizes for metrics that look good in reports (lead volume, MQL counts) while sales needs something completely different (qualified opportunities that close).

The fix is simple in concept, hard in execution: you need a documented, signed agreement on what constitutes a qualified lead.

Account-Level Thinking, Not Lead-Level

Here is a mindset shift that separates mature demand gen teams from struggling ones: stop thinking about individual leads and start thinking about accounts.

When someone downloads a whitepaper, that does not mean they are ready to buy. It means the account might be warming up. The buying committee at a B2B company includes multiple people. Your job is to nurture the account until enough members of that committee are engaged and ready for a sales conversation.

This is why we focus on account-level attribution rather than lead-level attribution. You are making investments in accounts, not chasing individual leads. You need to understand the total investment you are making into the buying center and how much that investment yielded in ARR.

Lead Qualification Contract Template

Element	What to Define
ICP Fit Criteria	Company size, industry, tech stack, geography, and any other firmographic requirements.
Behavioral Triggers	What actions indicate buying intent? Demo requests, pricing page visits, specific content downloads, repeat visits.
Lead Score Threshold	What score qualifies a lead as ready for sales? How is the score calculated?
Required Information	What data must marketing capture before handoff? Title, company, use case, timeline.
High-Intent vs. Low-Intent	Demo requests and contact sales forms are high intent and go to sales. Content downloads are low intent and need nurturing.
Handoff Process	How are leads passed to sales? What is the SLA for follow-up?
Feedback Loop	How does sales report back on lead quality? Weekly review meeting, disposition codes in CRM
Review Cadence	How often are these standards reviewed and updated? Quarterly at minimum.

The Meeting Cadence That Actually Works

Alignment is not a one-time event. It requires ongoing communication. But it does not require drowning in meetings. Here is what works:

- **Weekly pipeline reviews:** 30 to 60 minutes. Marketing and sales review lead status, quality feedback, and bottlenecks. This is non-negotiable.
- **Quarterly strategy reviews:** Half day. Review what marketing is planning to run, get sales input, align on targets and priorities.
- **Monthly performance report:** Note: this is a report, not a meeting. Sales will not attend a monthly performance meeting. Send a dashboard or document instead.

Notice what is missing: bi-weekly syncs, daily standups, and all the other meetings that eat up time without producing alignment. Keep it simple. Keep it consistent.

Pipeline Ownership Depends on Your GTM Model

You will hear benchmarks claiming marketing should own 30 to 50 percent of pipeline. Ignore them.

Pipeline ownership is entirely dependent on your go-to-market model. If your company depends 100% on demo requests for sales (no outbound, no partnerships), then marketing might own all the pipeline. If you have a strong outbound motion or channel partners, marketing's direct pipeline contribution will be lower.

What matters is not hitting an arbitrary benchmark. What matters is that marketing produces high-quality, high-intent revenue opportunities through specific lead submissions like demo requests and contact sales forms. Low-intent submissions like content downloads are not pipeline. They are nurture candidates.

Stop chasing percentages and start asking: are we producing enough qualified opportunities at an efficient cost?



SECTION 03

Know Your Buyer: ICP Development for Real Teams

When clients come to us saying "we do not really understand our ICP," the root cause is almost always the same: they do not have access to strong product marketing resources.

Maybe they have never done the work. Maybe they did it once three years ago and never updated it. Maybe they have a generic persona document that says things like "Marketing Mary is 35 to 45, works at a mid-sized company, and cares about ROI." None of that is useful for actually targeting and messaging.

Here is how to fix it, even if you do not have a dedicated product marketing team.

The AI Avatar Method

The traditional advice is to interview 10 customers. That is great if you have access to those customers, time to schedule the calls, and the skills to conduct proper research interviews. Most midsize SaaS teams have none of those things.

Here is a practical alternative: use AI as a proxy for initial customer research.

The process works like this:

- **Research your ICP using AI deep research tools.** Use publicly available information about your target buyers: their industries, their challenges, their goals, how they make purchasing decisions. Look at LinkedIn profiles, industry publications, earnings calls, and job postings to understand what they care about.
- **Create an AI avatar based on that research.** Build a detailed profile that captures the role, responsibilities, goals, challenges, and decision-making criteria of your ideal buyer.
- **Interview the avatar.** Ask it questions as if it were a real member of your ICP. What keeps them up at night? What would make them look for a solution like yours? What would stop them from buying?
- **Test your positioning and messaging.** Run your value propositions, taglines, and key messages by the avatar. See what resonates and what falls flat.

Is this as good as real customer interviews? No. But it is infinitely better than guessing or working from outdated personas. And it gives you a starting point that you can refine as you gather real feedback from the market.



Focus on the Primary Decision-Maker

You will read advice about mapping the entire buying committee: the economic buyer, the technical buyer, the user buyer, the champion, the blocker, and so on. For enterprise sales with long cycles and large deal sizes, this makes sense.

For midsize SaaS? Buying committee mapping is a pipe dream.

You do not have the resources to create targeted content for six different personas. You do not have the budget to run campaigns against all of them. And you do not have the sales capacity to nurture that many relationships simultaneously.

Instead, focus on the primary decision-maker. Go deep on understanding that one role: their goals, their challenges, their evaluation criteria, their objections, and how they make decisions. Create very short versions of the rest of the buying committee for reference, but do not pretend you can target everyone equally.

Depth beats breadth when your resources are limited.

ICP Research Prompt Template

Use this structured prompt with your AI research tool to develop a comprehensive ICP. The prompt includes eight elements that produce better, more actionable results than a simple question.

AI Prompt for ICP Development Persona

Persona

You are a senior B2B product marketing strategist with 15 years of experience developing ICPs for SaaS companies. You have deep expertise in buyer psychology, enterprise purchasing behavior, and translating market research into actionable targeting and messaging strategies.

Task

Develop a comprehensive Ideal Customer Profile for [YOUR PRODUCT/COMPANY]. The ICP should be detailed enough to guide targeting decisions, content strategy, and sales conversations.

Context

Our company sells [DESCRIBE YOUR PRODUCT/SERVICE]. Our primary target is [JOB TITLE] at [COMPANY TYPE: industry, size, stage, geography]. Our average deal size is [ACV]. Our main competitors are [LIST 2 TO 3 COMPETITORS]. We currently struggle with [DESCRIBE CURRENT ICP CHALLENGES: unclear targeting, wrong-fit customers, low conversion rates, etc.].

Example

Structure your ICP using these categories:

1. **Firmographics:** Industry, company size, revenue, tech stack, funding stage
2. **Role profile:** Title, responsibilities, reporting structure, success metrics
3. **Priorities:** Top 3 to 5 goals they are accountable for this year
4. **Pain points:** Specific challenges that would trigger a search for solutions
5. **Buying behavior:** How they research, evaluate, and purchase
6. **Objections:** Common concerns that stall or kill deals
7. **Language:** The exact terminology and phrases they use

Tone

Be direct and specific. Avoid generic statements that could apply to any buyer. Every insight should be concrete enough to act on. Write as if you are briefing a sales team that needs to have conversations tomorrow.



Output

Provide the ICP in a structured document format with clear sections. Include specific examples and quotes where possible. At the end, provide 5 qualifying questions a salesperson could ask to determine ICP fit, and 3 disqualifying signals that indicate a poor-fit prospect.

Boundaries

Do not make assumptions about our product capabilities. Do not include demographic information like age or gender unless directly relevant to the role. Focus on professional context, not personal characteristics. If you need information to provide a better answer, ask clarifying questions before proceeding.

Challenges

After providing the ICP, challenge your own assumptions. What might be wrong about this profile? What would invalidate these conclusions? What questions should we ask real customers to validate or refine this ICP?

How to use this prompt: Copy the template and fill in the bracketed sections with your specific information. The more context you provide, the better the output. After you receive the initial ICP, use follow-up prompts to go deeper on specific sections or to create the AI avatar for ongoing testing.

Creating Your AI Avatar

Once you have your ICP, create an avatar you can interview:

AI Avatar Creation Prompt

Based on the ICP we just developed, I want you to become that person. You are now [NAME], a [TITLE] at a [COMPANY DESCRIPTION]. You have the goals, challenges, and priorities we identified. You think and speak like someone in this role.

Stay in character for our entire conversation. When I ask you questions, respond as this person would. Be honest about what would and would not resonate with you. Push back if something feels off or would not work for someone in your position.

I will now interview you to test our positioning and messaging. Ready?

Once the avatar is active, you can test value propositions, taglines, objection handling, and content ideas. Ask questions like: "What would make you take a meeting with a vendor like us?" or "I am going to read you our homepage headline. Tell me your honest reaction."



SECTION 04

Content Engine: Big Rock + Atomization

If you deeply understand your ICP, you can define the right content pillars, topics, and subtopics that are relevant to your audience. Without that foundation, you are just creating content and hoping something sticks.

With that foundation in place, here is how to build a content engine that actually drives demand.

But first, we need to address why your current content strategy is probably failing.

The Zero-Click Problem in Detail

We introduced the zero-click crisis earlier. Now let us dig into what it actually means for your content strategy.

The traditional content playbook assumed a simple funnel: create content, optimize for search, rank on Google, get clicks, capture leads. Every step of that funnel is now broken.

What Zero-Click Actually Looks Like

When someone searches for information related to your product category, here is what happens today:

- **AI Overviews appear first.** Google generates a summary that answers the question directly. The user reads it and leaves. They never see your carefully optimized blog post.
- **Featured snippets steal your content.** Even if your content is the source, Google extracts the answer and displays it in the results. The user gets what they need without clicking.
- **People Also Ask expands infinitely.** Users can explore related questions without ever leaving the search page. Your content becomes invisible.
- **Video carousels redirect to YouTube.** If there is video content available, Google often prioritizes it. Clicks go to YouTube, not your website.

The result?

You can rank number one for your target keyword and still get almost no traffic. B2B companies are reporting that rankings improved from position 42 to position 9 while click-through rates dropped from 1% to 0.2%. That is an 80% decline in traffic despite dramatically better rankings.

Why This Hits B2B Harder

Zero-click is particularly brutal for B2B content because of how buyers research:

- **Informational queries get answered instantly.** The educational content you spent months creating? Google summarizes it in three sentences. Why would anyone click through?
- **Comparison queries go to aggregators.** When buyers search for product comparisons, they land on G2, Capterra, or Reddit. Not your carefully crafted comparison page.
- **Long-tail queries trigger AI Overviews most often.** Research shows that queries with 8+ words trigger AI Overviews far more frequently. These are exactly the high-intent, specific queries B2B marketers target.
- **70% of buyers complete research before contacting sales.** If they are completing that research in Google's interface instead of on your website, you have no visibility into their journey and no opportunity to influence their thinking.

The HubSpot Warning

HubSpot, widely considered an SEO leader with one of the best content marketing teams in the industry, experienced a 70 to 80% decline in organic traffic between 2024 and 2025. Their CEO acknowledged on an earnings call that organic search traffic is declining globally and that AI overviews are giving answers so fewer people click through to websites.

If HubSpot, with their resources and expertise, cannot outrun this trend, you need a different strategy.



The Solution: Take Content to the Edge

The answer is not to abandon content. It is to change where and how you distribute it.

Taking content to the edge means pushing your ideas, insights, and expertise to the platforms where your audience already spends time. Instead of waiting for buyers to find you through search, you meet them where they are.

Where your buyers actually are:

Channel	Why It Matters
LinkedIn	Where B2B professionals scroll daily. Native content gets algorithmic reach. Thought leader ads convert 3x better than company page ads.
YouTube	Second largest search engine. Top destination for search traffic. Second most visited domain from AI tools. Most B2B teams ignore it completely.
Podcasts	Relationship-building medium. Guest appearances convert at 25x the rate of blog posts. Creates content flywheel: episode, clips, quotes, transcripts.
Industry Communities	Slack groups, Discord servers, private forums. Where practitioners actually discuss problems and share recommendations. Peer influence drives decisions.
Reddit	Increasingly where people search for honest opinions. Google often surfaces Reddit results. Users trust anonymous peer feedback over vendor content.
Email Newsletter	Owned channel with direct access. No algorithm changes. Subscribers opted in and want to hear from you. Compounds over time.

Notice what these channels have in common: they are places where people spend time voluntarily. They are not searching for answers. They are scrolling, listening, participating. Your content needs to meet them in that context.

What This Means for Your Content Strategy

The shift from search-first to edge-first content requires three changes:

- **Create for consumption, not just discovery.** Your content needs to deliver value in the feed, not just attract clicks. A LinkedIn post should provide an insight, not just tease a blog post.
- **Invest in distribution, not just production.** Most teams spend 80% of their effort creating content and 20% distributing it. Flip that ratio. A mediocre piece with great distribution beats a great piece that nobody sees.
- **Build an audience, not just a content library.** The goal is not to have 500 blog posts. The goal is to have 5,000 people who want to hear from you. Audience is an asset. Content without audience is inventory.

This does not mean you abandon your website. Your website still matters for high-intent visitors, product information, and conversion. But it is no longer the center of your content universe. It is one node in a distributed network.

The Big Rock Model

The big rock model means focusing your energy on creating highly authoritative content properties that establish your company as the definitive voice on topics your buyers care about.

A big rock is not a blog post. It is a substantial piece of content with a clear point of view, backed by research or data, that provides genuine value to your audience. Think comprehensive guides, original research reports, frameworks, or deep-dive analyses.

The goal is twofold:

- **Be LLM-ready.** Create content formatted with proper schema markup so it can be found and cited by AI tools. This is the new SEO.
- **Create atomization potential.** One big rock should fuel four to six weeks of derivative content across multiple channels and formats.

The Atomization Framework

One blog post, when properly atomized, can generate dozens of content pieces across multiple platforms. Here is the complete framework:

Default Syndication (All Blog Posts)

Platform	Format	Timeline
Medium	Full republication with canonical tag	Day 0
LinkedIn	Native article	Day 0
Email Newsletter	Teaser (100 words max) + CTA	Day 3



LinkedIn Promotion Schedule

Timing	Format	Notes
Day 0	Native article + announcement post	Tag all quoted sources
Day 2	Pull quote graphic	Visual with key insight
Day 4	Discussion question post	Based on article topic
Day 7	"In case you missed" post	Different angle from original
Week 2	Carousel	Visual summary of key points
Week 3	Short video clip	Key point in 60 seconds
Week 4	Poll	Related to article topic

Executive Involvement Tiers

Not every piece of content needs executive amplification. Use this framework to decide when and how to involve leadership:

- **Tier 1:** Executive post or share. Major content only. Original research, significant announcements, or thought leadership that benefits from executive credibility.
- **Tier 2:** Executive quote in article. Include a quote from leadership to add authority without requiring them to promote.
- **Tier 3:** Corporate account only. Standard content promoted through company channels. No executive involvement needed.

This prevents executive burnout while ensuring their involvement is reserved for content that truly benefits from their credibility.

The YouTube Gap

Here is something most B2B teams are missing: YouTube is now the top destination for traditional search traffic, and it is the second-most visited domain from AI tools.

Everyone is fighting over LinkedIn while ignoring the second-largest search engine in the world.

If you are not leveraging video and YouTube as a content distribution and audience building channel, you are leaving massive opportunity on the table. Your big rock content should be adapted into video format and published on YouTube, not just embedded on your website.

Community Sharing (Opportunistic)

Share content in communities when it is genuinely relevant, not as a promotional tactic:

- **Reddit:** relevant subreddits where your audience participates
- **Quora:** answer specific questions with links to deeper content
- **Industry Slack** and Discord communities
- **Medium** publications in your industry

The key word is **opportunistic**. Do not spam communities with promotional content. Participate genuinely and share when your content adds value to an existing conversation.





SECTION 05

Metrics That Actually Matter

Too many demand gen teams are measuring the wrong things. They obsess over MQLs while pipeline stagnates. They celebrate traffic growth while revenue flatlines. They report on activity while sales questions whether marketing is contributing anything.

Here are the metrics that actually tell you whether demand gen is working.

Pipeline and Deal Velocity

If you had to pick one metric to obsess over instead of MQLs, this is it.

Pipeline velocity measures how fast deals move through your funnel. The formula is: (Number of Opportunities x Average Deal Size x Win Rate) divided by Sales Cycle Length.

Each component tells you something important:

- **Number of opportunities:** Is marketing generating enough at-bats for sales?
- **Average deal size:** Are we attracting the right size customers?
- **Win rate:** Are the opportunities well-qualified?
- **Sales cycle length:** Are deals moving efficiently or stalling?

When pipeline velocity increases, revenue follows. When it decreases, you have a problem to diagnose.

Net Revenue Retention

NRR measures how much revenue you retain and expand from existing customers. For midsize SaaS companies, 40% of growth now comes from expansion rather than new logos.

Target benchmarks:

- \$15 to 30M ARR: Target 105%+ (top quartile)
- Above \$30M ARR: Median is 105 to 115%
- Higher ACV correlates with higher NRR (above \$50K ACV typically achieves 105 to 108%)

S&M Spend as Percentage of Revenue

This metric provides context for whether your investments are in line with your stage:

- \$10 to 20M ARR: 40 to 42% of revenue is median
- Above \$100M ARR: 33% of revenue is median
- Marketing specifically: 10% of ARR (equity-backed) or 5% (bootstrapped)
- Demand gen typically consumes 40 to 50% of the marketing budget



CAC: The North Star

Customer Acquisition Cost is the metric that connects marketing activity to business outcomes.

The question you should always be asking: are we closing deals at the right conversion rates with an efficient CAC?

Here are the benchmarks for midsize SaaS (these are based on 2024/2025 data and will likely shift):

Metric	Benchmark
New CAC Ratio (Median)	\$2.00 S&M spend per \$1 new ARR
New CAC Ratio (Top Quartile)	\$1.55 S&M spend per \$1 new ARR
Expansion CAC Ratio	\$1.00 per \$1 expansion ARR
CAC Payback Period (Target)	12 to 18 months

Note that expansion CAC is roughly half the cost of new logo acquisition. This is why NRR matters so much, which brings us to the next metric.

Net Revenue Retention

NRR measures how much revenue you retain and expand from existing customers. For midsize SaaS companies, 40% of growth now comes from expansion rather than new logos.

Target benchmarks:

- \$15 to 30M ARR: Target 105%+ (top quartile)
- Above \$30M ARR: Median is 105 to 115%
- Higher ACV correlates with higher NRR (above \$50K ACV typically achieves 105 to 108%)

S&M Spend as Percentage of Revenue

This metric provides context for whether your investments are in line with your stage:

- \$10 to 20M ARR: 40 to 42% of revenue is median
- Above \$100M ARR: 33% of revenue is median
- Marketing specifically: 10% of ARR (equity-backed) or 5% (bootstrapped)
- Demand gen typically consumes 40 to 50% of the marketing budget

Why Self-Reported Attribution Is Overrated

You will hear a lot about self-reported attribution as the solution to tracking demand gen impact. The idea is simple: add a free-text field to your demo request form asking "How did you hear about us?" and use the responses to understand what is driving demand. Here is the problem: it does not tell you much more than what you would capture in GA4.

When someone fills out a form saying "I saw you on social media," how is that capturing anything meaningful about the complex, multi-touch journey they took? The buyer journey is tortuous. Multiple people from the same account touch multiple channels over months. A single field cannot capture that complexity.

Self-reported attribution makes marketers feel like they are getting to the bottom of things while missing the entire point. Focus on account-level attribution and the efficiency of your total investments instead.

The Efficiency Question

When someone asks "how do we know if demand gen is working," the honest answer focuses on efficiency.

This is a quality versus quantity conversation. If you are bringing enough leads that close at the right conversion rates with the right CAC, then things are working. If any of those components are off, you have a specific problem to solve.





SECTION 06

The 90-Day Sprint

Let us be honest about timelines: clients are expecting in-quarter movement. They want to see pipeline impact in the first 90 days. They do not need to see millions, but they want to see pipeline building or they get frustrated and detached from the program immediately.

Call it marketing ADHD. If leadership does not see directional progress, they will question whether demand gen is working at all.

This sprint is designed around that reality. It front-loads the work that produces visible results while building the foundation for sustainable growth.

Prerequisites: What You Need Before Starting

Not every team is ready to build a demand gen engine. Here is what you need in place:

- **Demand generation manager.** Someone who owns the function and can dedicate focused time to it.
- **Product marketing expertise.** Either dedicated PMM or someone who can do the ICP and messaging work.
- **Content manager.** Someone who can execute the content engine.
- **SEO capability.** Internal expertise or agency support.

If you do not have these roles covered, you can contract them out to agencies. But you need the capabilities, whether internal or external.

Phase 1: Foundation (Weeks 1 to 4)

The first month is about learning and aligning. Do not launch campaigns yet.

Week 1 to 2: Discovery

1. Learn as much as possible about the business, products, and market position
2. Interview sales team: What are they hearing? Where do deals stall? What content do they wish they had?
3. Audit existing content, campaigns, and marketing activities
4. Analyze CRM data: Which segments and verticals have highest win rates?

Week 3 to 4: Alignment

1. Document and sign lead qualification contract with sales
2. Complete ICP development using AI avatar method
3. Fix any broken tracking or attribution issues
4. Select ONE pilot channel to focus on initially

Phase 2: Build Momentum (Weeks 5 to 8)

Now you start executing, but with discipline. One channel, one program, full focus.

1. Launch pilot campaign on selected channel with clear goals
2. Begin consistent thought leadership content on LinkedIn
3. Create first big rock content piece
4. Execute atomization framework for that content
5. Hold weekly meetings with sales to calibrate quality
6. Track leading metrics to show directional progress

Phase 3: Scale What Works (Weeks 9 to 12)

By now you should see early signals. Double down on what is working.

1. Document successful processes so they can be replicated
2. Gradually add second channel (only after first is working)
3. Expand content distribution: guest posts, podcast appearances
4. Create demand gen dashboard showing pipeline impact
5. Plan for sustained execution in months 4 through 6

Realistic Timeline for Results

Milestone	Timeline
Early engagement signals	30 to 60 days
First inbound opportunities	60 to 90 days
Meaningful pipeline impact	3 to 6 months
Compounding effects	12+ months of consistent execution

The key principle: do not hire for processes that do not exist yet. Bring people to maintain existing campaigns while leaving space for continued experimentation.





WHAT'S NEXT

Ready to Build Your Growth Engine?

Everyone talks about demand generation. Few teams can actually get it done.

The frameworks in this playbook work. But execution requires consistency, and consistency is hard when you are also managing a dozen other priorities.

That is where we come in.

Marketlogic helps B2B SaaS teams build sustainable demand generation engines through our S.M.A.S.H. methodology. We complement your team with expertise in strategic planning, creative development, campaign execution, lead qualification, and sales acceleration.

The goal is not to replace your team. It is to help you build habits that produce results long after we are gone.

When to Get Help

Consider working with us if:

- You do not have dedicated product marketing resources
- Your team lacks bandwidth to execute consistently
- Sales and marketing alignment is broken
- You need to show pipeline impact quickly
- You are stuck in lead gen mode and need help transitioning

Let's talk about your demand generation challenges.
mymarketlogic.us



About Marketlogic

Marketlogic is a B2B marketing agency specializing in demand generation for midsize SaaS companies. We help teams escape lead generation theater and build growth engines that produce sustainable pipeline through the S.M.A.S.H. methodology: Sales and Marketing Achievement Through Sustainable Habits.

 **marketlogic**
ideas meet results