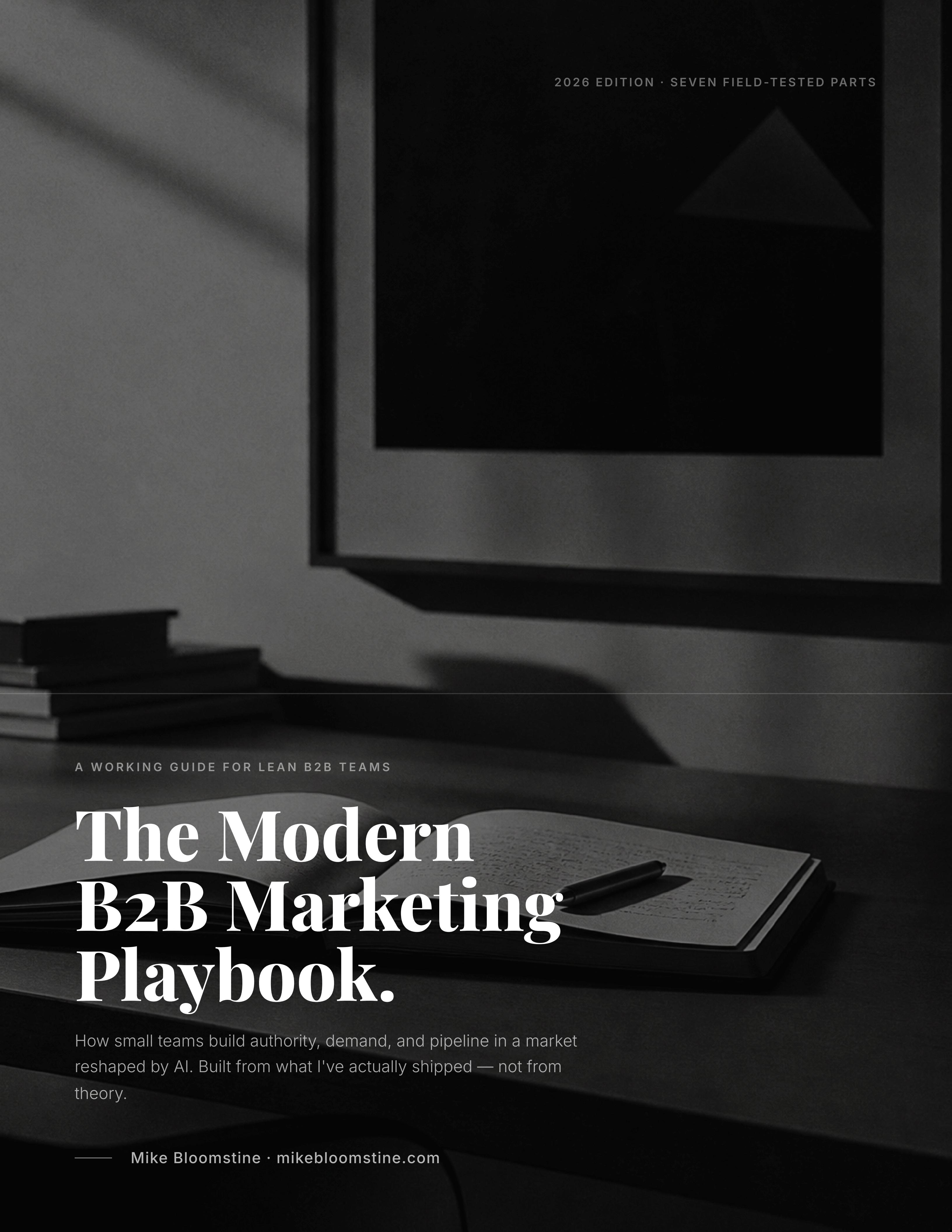

2026 EDITION · SEVEN FIELD-TESTED PARTS

A WORKING GUIDE FOR LEAN B2B TEAMS

The Modern B2B Marketing Playbook.

How small teams build authority, demand, and pipeline in a market reshaped by AI. Built from what I've actually shipped — not from theory.

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START HERE

What This Playbook Is For.

The operating guide I wish I'd had earlier — built for marketing leaders who carry a wide remit with a lean team.

B2B marketing changed faster than most teams' operating models did. I've watched it happen across every organization I've worked in — buyers running most of their process before they ever raise a hand, more questions getting answered inside AI assistants than on a page of blue links, and the teams pulling ahead tending to be small ones that use automation to perform well above their headcount.

The data confirms what I've seen on the ground. According to 6sense's 2025 Buyer Experience Report, **80% of B2B deals are won by the vendor the buyer already preferred before first sales contact** — and 83% of buyers define their requirements before reaching out. The hand-raise is confirmation, not discovery. By the time a form gets filled, the decision is frequently half-made.

This is the operating guide I wish I'd had in front of me earlier. It's built for marketing leaders and operators who carry a wide remit with a lean team: brand, content, demand, enablement, and the systems underneath. Each part gives you a model, the moves I've seen work, and a way to put it to work this quarter.

WHO IT'S FOR

Heads of marketing at lean organizations, founders running their own go-to-market, and operators who own more than their title suggests.

HOW TO READ IT

Skim the contents, jump to the part you need now, and run the 90-day plan at the back to sequence the work.

THE PREMISE

Headcount is no longer the ceiling on output. Judgment, a clear point of view, and a well-built system are.

CONTENTS

What's Inside.

PART 01

What Changed in B2B Buying.

Build for how buyers actually work now, not for the funnel diagram on the wall.

80% of deals won before first sales contact *6sense, 2025 Buyer Experience Report*	**83%** of buyers define requirements before contacting sales *6sense, 2025*	**60%** of the buying journey is self-directed research *6sense, 2025*

The mechanics of how a company decides to buy have shifted under everyone's feet. I've built programs across multiple buying cycles and the same pattern keeps showing up: the teams winning aren't the ones with the biggest budgets — they're the ones who figured out how buyers actually work now. Gartner puts it plainly: **only 17% of the buying process is spent meeting with potential suppliers**, and the average purchase involves 6–10 stakeholders going through 27 touchpoints before a decision.

MOST OF THE PROCESS IS SELF-DIRECTED AND INVISIBLE.

Buyers research, compare, and form a shortlist long before they contact sales. A large share of that activity happens in places you can't track: private communities, peer DMs, group chats, podcasts, and dark social. Analytics capture only 25–30% of the buyer's journey; the rest is untrackable. By the time a form gets filled, the decision is frequently half-made. The hand-raise is confirmation, not discovery.

WHAT IT MEANS FOR YOU

Build to be found and trusted before the hand-raise, not only to capture it after. The work that happens before someone fills out a form is where most of the game is played.

The Shift, in One Table.

The old motion still shows up in plans and org charts. The new one tends to win. Most of this playbook is about closing the gap between the two.

THE OLD MOTION	THE MOTION THAT TENDS TO WIN NOW
Marketing creates demand, sales captures it.	Buyers self-educate; marketing's job is to be present and credible while they do.
Gate everything to generate leads.	Earn trust in public; gate only what's worth an email.
One linear funnel.	Many signals and non-linear paths across 27 avg. touchpoints (Gartner).
Rank on Google.	Be the cited source across search and AI answers — 94% of buyers now use LLMs to research (6sense, 2025).
Channels in silos with separate goals.	One orchestrated system with shared goals.
Headcount drives output.	Automation and AI drive output — 87% of marketers now use GenAI in recurring workflows (Salesforce, 2026).
Report lead volume.	Report pipeline and revenue influence.

You don't have to flip every row at once. I never have. Pick the gaps costing you the most and start there.

THE DARK FUNNEL

73% of B2B buyers report that significant decision-making happens outside vendor touchpoints (Gartner). Search is also fragmenting — more questions now get answered inside AI assistants. Being the source those systems cite is becoming its own discipline.

PART 02

Positioning & Message Foundation.

The work you do before any content is worth making.

Positioning is the foundation. I've made the mistake of skipping it — producing volume that never compounded into authority because the base wasn't there. Don't do that. The time you spend here pays back in every piece of content you ever write after it. Research backs this up: **49% of B2B decision-makers say they have awarded business based on thought leadership content alone** (Cascade Insights), and 73% say it's more trustworthy than traditional marketing (eLearning Industry, 2026).

ANSWER THREE QUESTIONS PLAINLY.

Category. What space are you in, or the one you intend to define? **Audience.** Who is it for, specifically — and who is it not for? **Reason to choose you.** Why you over the obvious alternative, including doing nothing? Write the answers in language a customer would actually use. If the words only make sense inside your building, they won't travel.

BUILD A MESSAGE HIERARCHY.

One core promise. Three supporting pillars. Proof under each. Everything you publish should ladder up to one of the three — this keeps a small team consistent without a committee reviewing every line. I've run this system across multiple orgs and it's the single thing that most reliably prevents drift. Companies that excel at personalization generate **40% more revenue** than average players (McKinsey) — and consistent positioning is what makes personalization possible.

GIVE THEM A REASON IT MATTERS NOW.

Tie the case to a change in the buyer's world, not a feature in your product. A clear cost of standing still tends to move people more than another list of capabilities.

> PRINCIPLE
>
> If your team can't state the core promise the same way without reading from a doc, the positioning isn't finished.

PART 03

The Content Engine.

Think in systems, not posts.

Content marketing generates **3× more leads than outbound at 62% lower cost** (Content Marketing Institute) — and companies with active blogs generate 67% more leads monthly than those without. But generic content is now effectively free and infinite, so it's worth very little. The advantage goes to teams with a clear point of view and a system that compounds. I've built this from scratch at multiple organizations.

PILLAR → CLUSTERS

- Sub-topic article
- Practical how-to
- Original data / teardown
- Point-of-view piece

EACH ONE REPURPOSED INTO

- Long-form article
- Short video clip
- Social posts (3–5)
- Email newsletter
- Slide deck

MAKE ONCE, REPURPOSE WITH INTENT.

B2B buyers consume an average of **13.4 pieces of content** before contacting sales (ZoomInfo, 2026). A single strong piece of thinking can become an article, a teardown, a short video, a set of social posts, an email, and a deck. Produce the core idea well, then adapt it for each surface. I've used this approach to run a full content program with a team of two.

CADENCE BEATS BURSTS.

A steady rhythm a small team can sustain compounds better than campaigns that spike and vanish. Organic traffic converts at **2.8× higher rate** than paid traffic (omnibound.ai, 2026). The content that earns that traffic is built over months, not weeks.

PART 04

Channel Orchestration.

Run search, social, email, and video as one motion — not four separate campaigns.

The teams I've seen pull ahead don't run channels in silos. They pick a few that fit their audience and run them as one coordinated system. The goal is to be present at every stage of the buyer's self-directed journey — which, per Gartner, spans 27 touchpoints and 10+ months on average. You can't be everywhere, so the channels you choose need to work together.

SEARCH AND GEO (GENERATIVE ENGINE OPTIMIZATION).

Traditional SEO still matters, but **94% of B2B buyers now use LLMs to synthesize research** during their purchase process (6sense, 2025). Buyers referred from AI search tools spend up to **3× more time on-page** than visitors from traditional search (Forrester, 2025). Optimizing to be cited by AI answer engines is now a distinct discipline — separate from ranking blue links. I've started building for this explicitly, and the early results are real.

LINKEDIN AND SOCIAL.

LinkedIn is where most B2B buying conversations happen in public. Post consistently, engage in comments, and build an audience around your point of view — not your product. Dark social (DMs, Slack groups, private communities) is where a lot of the real influence happens. You can't track it, but you can earn it by being genuinely useful in public.

EMAIL.

Email is the **#1 lead generation channel**, used by 66% of teams and 72% of high performers (Pipeline360, 2025). It's the one audience you own outright. Treat the list as an asset and the newsletter as a relationship rather than a promo dump. The inbox is where you stay useful to the 95% of your market that isn't ready to buy today.

ORDER OF PRIORITY

Owned channels like email and your site compound. Rented channels like social and search reach. You want both — commonly in that order.

PART 05

The AI & Automation Layer.

The part that separates teams right now.

87% of marketers use GenAI in recurring workflows *Salesforce, State of Marketing 2026*	**6.1 hrs** saved per week per marketer using AI tools *HubSpot, AI Trends 2026*	**22%** higher ROI from AI-driven campaigns *McKinsey / Zebracat*

I've built AI-enabled workflows across content, research, and analytics, and the output difference is not incremental — it's structural. A small group that orchestrates AI across its workflows tends to produce the output of a team several times its size. Companies using AI publish **42% more content per month**, and AI-driven campaigns deliver **32% more conversions and 29% lower acquisition costs**.

WHERE AI FITS: THREE LAYERS.

LAYER	WHAT IT DOES	COMMON TOOLS
Content	Drafting, repurposing, variation, and editing at speed — with a human owning the point of view and the final word.	Claude, ChatGPT, Gemini
Research	Synthesizing markets, competitors, and the language real customers use — in hours instead of weeks.	Perplexity, Claude
Analytics & Ops	Turning scattered data into briefs, summaries, and reports on a schedule, without a person assembling each one by hand.	n8n, Make, HubSpot

PRINCIPLE

AI handles volume and velocity. People own taste, judgment, and relationships. Keep that line clear and you get the upside without the slop.

Building Your AI Stack.

You don't need every tool. You need a few layers that connect, and the discipline to automate one workflow at a time.

HOW TO START WITHOUT STALLING.

Pick one repetitive, high-volume workflow — turning a single article into a week of channel assets, or producing a weekly performance brief. Automate it end to end, then move to the next. Compounding comes from stacking small automated workflows, not from one giant build that never ships. I've made the mistake of trying to build the full system at once. It doesn't work. Start with one workflow, prove it, then add the next. Only **6–30% of marketing organizations have fully integrated AI across their workflows** (BizIQ/Digital Applied) — the gap is real, and it's an opportunity.

GUARDRAILS WORTH KEEPING.

→ Keep a human approval step on anything customer-facing. 78% of consumers say explicit labeling of AI-generated content is "very important" for maintaining trust (Gartner, 2025).

→ Check facts and numbers before they go out — AI is confidently wrong more than you'd like.

→ Protect anything sensitive or regulated; know what data goes where.

→ Write down your prompts and workflows so they're repeatable, not locked in one person's head.

ORCHESTRATION LAYER

Connect steps into automated workflows that run without manual intervention. n8n and Make are where I've had the most success building durable pipelines.

SYSTEM OF RECORD

Where work, data, and pipeline live. Your CRM and project tool need to be the source of truth — AI outputs should flow into them, not around them.

THE POINT

The goal isn't to replace the team. It's to remove the repetitive work that was quietly capping what a good team could ship — so their attention goes to the parts only people can do well.

PART 06

Demand Generation & Pipeline.

Attention only matters if it turns into pipeline your sales team can close.

This is where I've seen good marketing leak the most value. Forrester's 2024 State of Business Buying found that **86% of B2B purchases stall during the process**, and 81% of buyers are dissatisfied with their purchase experience. The gap between a team that generates a lot of activity and one that generates a lot of pipeline is almost always in three areas.

CAPTURE WITH INTENT.

A few well-built conversion paths beat dozens of forms. Gate the assets worth an email — a real tool, a substantive guide, a calculator — and keep the rest open to build trust. The average B2B cost per lead is ~$200 (Zeliq, 2025), but SEO, email, and webinars bring that down to $31–$72 per lead. I've removed gates from content that was generating leads but not pipeline, and seen the downstream quality improve.

FIX THE HANDOFF.

Agree with sales on what a qualified lead actually is, route it fast, and close the loop so marketing can see what happened after the form. Most pipeline leaks at this seam, and it's usually fixable with a conversation rather than a tool. I've run this conversation at every company I've worked at — it's always worth having. **86% of sales teams using AI report positive ROI** (Sopro, 2025), but only when the handoff is clean.

ENABLEMENT AND NURTURE.

Reps need current battle cards, the message map, and proof. If sales is improvising the story, marketing hasn't finished it. And since most of the market isn't ready today, stay useful in the inbox and the feed so you're the obvious call when timing changes. The average buying cycle is **10.1 months** (6sense, 2025) — nurture is not optional.

PRINCIPLE

Marketing's real output is qualified pipeline and revenue influence, not lead volume. I've had to make this case to leadership more than once — and the data always backs it up.

PART 07

Measurement That Holds Up.

Track fewer things, tied to the business, reviewed often.

I've built and rebuilt measurement frameworks across multiple organizations and the pattern is consistent: a short list of metrics that ladder to pipeline and revenue beats a dashboard nobody reads. Only **21% of brands say they have fully integrated AI for personalization across channels** (StackAdapt/Ascend2, 2026) — and 83% of marketers recognize the shift toward personalized messaging but only 1 in 4 are satisfied with how they use their data (Salesforce). The goal isn't to track everything — it's to track the right things and actually use them to make decisions.

AUDIENCE

Organic traffic, impressions, AI visibility, subscribers

Are you being found and trusted?

ENGAGEMENT

Content engagement, return visits, email replies and clicks

Is the work landing?

PIPELINE

Pipeline created and influenced, qualified-lead rate

Is it converting to opportunity?

BUSINESS

Revenue influenced, win rate, payback

Is it paying off?

THE ATTRIBUTION REALITY.

A lot of your most valuable influence — dark social, word of mouth, the podcast someone half-remembers — will never show up in your model. Use attribution to inform decisions, not to claim precision you don't have. A simple self-reported "how did you hear about us" often catches what tracking misses. I've seen this single question change how a team allocated its budget.

LEADING VS. LAGGING

Leading signals like cadence, visibility, and pipeline created tell you early. Lagging outcomes like revenue and win rate tell you whether it worked. Watch both.

PUT IT TO WORK

The 90-Day Quick-Start.

A sequence, not a wish list. I've used this to stand up programs at multiple organizations — each phase sets up the next.

01

DAYS 1–30

Foundation

Write the positioning and message map. Pick your three pillars. Audit current content and channels. Stand up your first automated workflow. Set a short metric list with a baseline.

02

DAYS 31–60

Engine

Start shipping. Publish on a cadence you can sustain. Repurpose every piece across channels. Add GEO structure to priority pages. Build the lead-capture paths that matter. Agree the qualified-lead definition with sales.

03

DAYS 61–90

Compounding

Stack and sharpen. Add two or three more automated workflows. Double down on the channels and topics showing traction. Tighten the sales handoff and enablement. Cut the metrics that aren't moving anything.

By the end of 90 days you should have a system that runs, not a pile of campaigns that ran. The goal is compounding — every week should be easier than the last because the infrastructure is doing more of the work.

WHY THIS SEQUENCE

Foundation before engine, engine before compounding. I've seen teams skip to the middle and wonder why nothing sticks. The sequence is the point.

REFERENCE

The Checklists.

Everything in the playbook, in a form you can run against. If you can tick most of these, the system is working.

FOUNDATION

- [ ] Positioning written in customer language
- [ ] Message map shared with team and sales
- [ ] Three pillars chosen
- [ ] Metric short-list set and baselined

CONTENT ENGINE

- [ ] Pillars and clusters defined
- [ ] A cadence you can actually sustain
- [ ] A repurposing workflow in place
- [ ] A clear point of view in every piece

AI & AUTOMATION

- [ ] At least one workflow automated end to end
- [ ] Human approval on customer-facing output
- [ ] Prompts and workflows documented
- [ ] Sensitive and regulated data protected

DEMAND & MEASUREMENT

- [ ] A few strong conversion paths live
- [ ] Sales handoff and qualified lead agreed
- [ ] Nurture running for the not-yet buyers
- [ ] Revenue-tied metrics reviewed monthly

THE RESEARCH BEHIND IT

Every item in this checklist maps to a documented pattern in the data: 6sense, Gartner, Forrester, Salesforce, HubSpot, McKinsey, CMI, and Pipeline360. The strategies here aren't opinions — they're what the evidence points to, filtered through what I've actually shipped.

WHERE TO GO NEXT

Let's Keep Going.

If this maps to where your team is, this is the work I do: helping lean marketing functions build the system behind it — from positioning and a content engine to the AI workflows that let a small team perform like a big one.

Book a working session →

CONNECT

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Mike Bloomstine is a senior marketing and content leader with 10+ years building content engines and integrated digital programs across publishing, B2B, and B2C. He writes on AI-enabled marketing and the lean, automated teams it makes possible.