

THE DIGITAL FUNNEL CHECKLISTS

ACTIONABLE FRAMEWORKS FOR SMARTER, FASTER, MORE PROFITABLE DEMAND GENERATION.

B2B DEMAND GENERATION PLANNING CHECKLIST (2025–2026 EDITION)

A complete checklist for teams building predictable, intent-driven growth engines.

✓ Strategy & Alignment

- ☐ Define ICP tiers with attributes (industry, use case, buying stage).
- ☐ Map the buyer journey across awareness → intent → purchase → expansion.
- ☐ Align sales + marketing around shared pipeline and revenue metrics.
- ☐ Identify “high-value moments” where personalization improves conversion.

✓ Data & Insights

- ☐ Audit first-party data and score quality, completeness, and readiness.
- ☐ Integrate intent data sources (search, content consumption, technographics).
- ☐ Set up AI-driven behavior scoring for accounts & contacts.
- ☐ Build dashboards for attribution, channel insights, and buyer engagement.

✓ Content & Messaging

- ☐ Document your narrative and value pillars.
- ☐ Create content mapped to intent stages (awareness → late-stage intent).
- ☐ Enable sales with targeted messaging kits.
- ☐ Develop thought leadership assets to win attention and authority.

✓ Channel Execution

- ☐ Prioritize channels with proven ROI (email, content syndication, LinkedIn).
- ☐ Implement nurture tracks tailored to buyer intent.
- ☐ Create integrated SEO + paid + organic content workflows.
- ☐ Optimize landing pages for frictionless conversion and relevance.

✓ AI & Automation

- ☐ Set rules for AI-generated content (quality, accuracy, brand voice).
- ☐ Build AI-based personalization triggers for timing & message relevance.
- ☐ Use automation for lead routing, follow-up, and lifecycle scoring.
- ☐ Create predictive models to identify high-intent accounts weekly.

✓ Measurement & Optimization

- ☐ Establish pipeline, revenue, and velocity KPIs.
- ☐ Track channel efficiency (CPL, CAC, intent lift).
- ☐ Audit campaign performance monthly and iterate fast.
- ☐ Review buyer experience touchpoints quarterly.