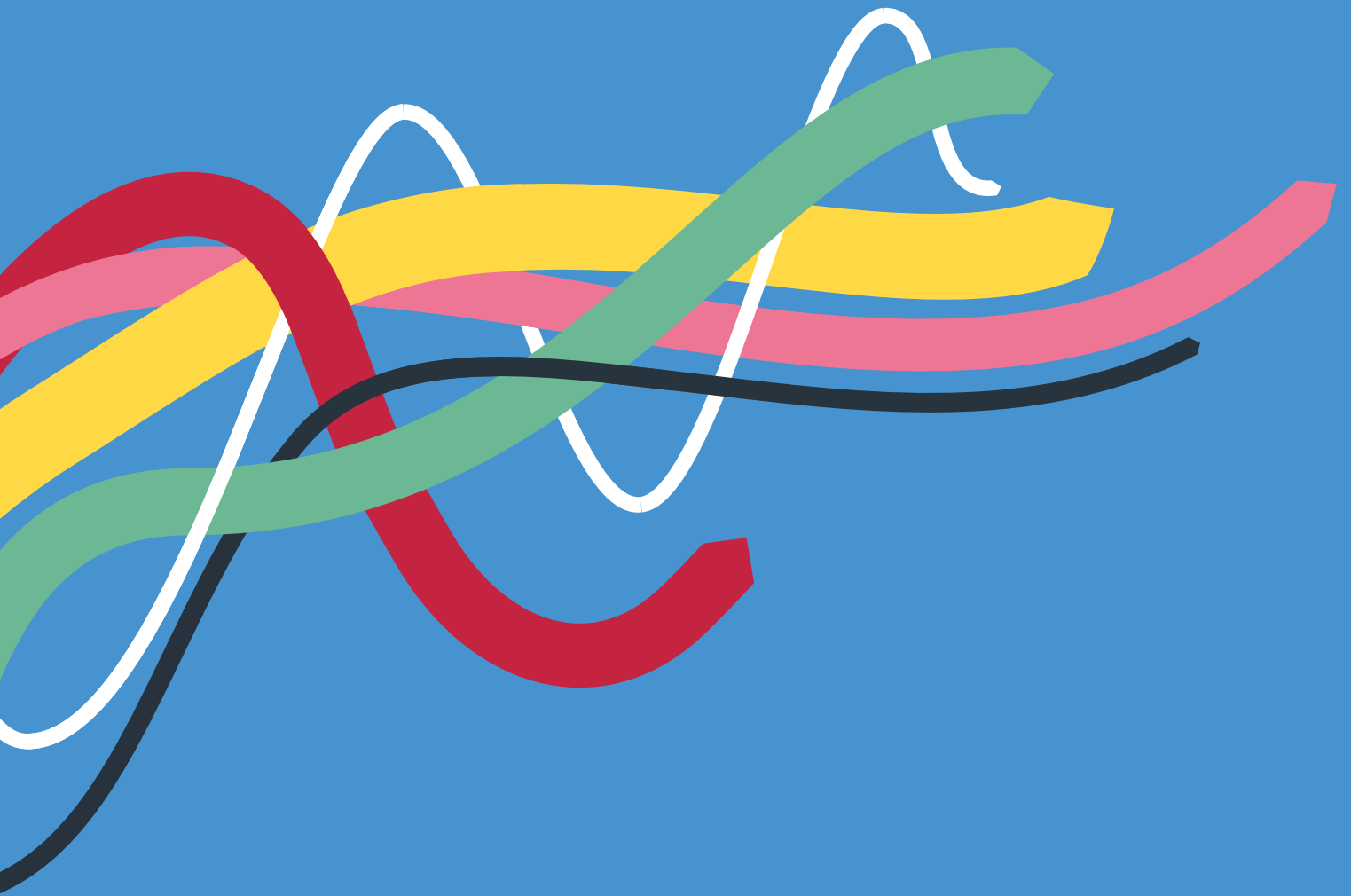


Benchmark report 2025 -2026

# Growth & Marketing in IT & Cloud

A focused benchmark report for cloud teams ready to scale smarter  
and faster.





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## 1. FOREWORD

“Dutch cloud providers should upgrade their commercial engines now to stay competitive in a rapidly evolving market.”



The cloud services market is growing. But so is the **competition**. While the tech stack evolves fast, many go-to-market teams are still playing catch-up.

At Gradient, we speak with Dutch cloud leaders daily—founders, CROs, marketers, and sales leaders. Nearly all of them say the same thing: they know what they should be doing... but bandwidth, focus, and clarity are in short supply.

Inbound leads are inconsistent. Messaging sounds like everyone else. Campaigns feel like one-offs. And scaling? That feels out of reach without more headcount or budget.

This report is for those leaders. They do not need convincing that marketing matters, they are the ones who are ready to act on it.

## What This Benchmark Reveals

We surveyed commercial teams across the Dutch cloud ecosystem, from IaaS and PaaS to hybrid players and SaaS platforms. The goal was to identify what's blocking growth and what to do next.

### **The data shows five clear friction points:**

1. Inbound lead flow is too unpredictable
2. Marketing teams can't scale demand with current resources
  3. Channel strategy is underdeveloped
  4. Messaging fails to stand out
5. And sales targets keep slipping, even when the pipeline looks full

These are fixable problems — if you're willing to face them head-on.

## What This Report Gives You

This is not a theoretical deck or 50 pages of fluff.

### **It's a focused, evidence-based roadmap:**

- The five biggest commercial challenges, backed by real data
  - Insights from interviews with Dutch cloud leaders
- Global best practices from companies already ahead of the curve
  - A diagnostic tool to assess your commercial maturity

## The Opportunity is Real

Cloud demand is still growing. Buyer expectations are shifting. New channels are opening. The teams aligning with precise positioning, and scalable campaigns. Sharper sales execution will **win this next chapter.**

This report shows you where to start.

Let's go.

Joost Jongbloed,  
*CEO/co-founder Gradient*

## 2. INTRODUCTION

# *Rethinking Growth in Cloud Hosting*

Scale with strategy, people and tech

The cloud hosting market is booming. But beneath the headline growth lies a sharper, more demanding reality: buyers are more educated, deals are more complex, and expectations are rising fast. For commercial leaders, the old tactics — vague messaging, generic outreach, and siloed campaigns — no longer deliver.

At the same time, the business's internal side is also under pressure. As the external market matures, so must the internal machine. Commercial teams need to be as efficient, sophisticated, and targeted as the cloud solutions they sell. This report unpacks that shift.

**“Cloud alone won’t cut it.  
Buyers want cost control,  
security clarity and ROI  
before sales enters  
the picture.”**

### **Cloud is Growing — But So Are the Demands**

The global cloud market is projected to exceed \$900 billion by 2025 and surpass \$5 trillion by 2034 — a fivefold expansion in under a decade.

Yes, SaaS remains the most significant slice of the pie. However, real acceleration is happening in IaaS and PaaS, where developer-centric and infrastructure-driven use cases are booming. Major hyperscalers dominate, but specialists gain ground by owning specific performance, compliance, or regional niches.

#### **Three forces are pushing this growth:**

- The rise of **AI infrastructure**, especially generative AI workloads
  - A shift toward **value-based buying** and self-education
- And the ongoing push for **efficiency and visibility in every IT dollar spent**

## The Market Has Evolved. How about Your Commercial Strategy?

From 2021 to 2024, cloud buyers evolved. Growth at all costs was replaced by growth with control. Buyer behavior shifted. Expectations matured. Yet many commercial teams are still stuck in old rhythms: campaign bursts, unclear handoffs, and overreliance on gut feel.

Our survey of Dutch cloud leaders highlights this gap.  
**Here are the 5 most common blockers standing in the way of growth:**

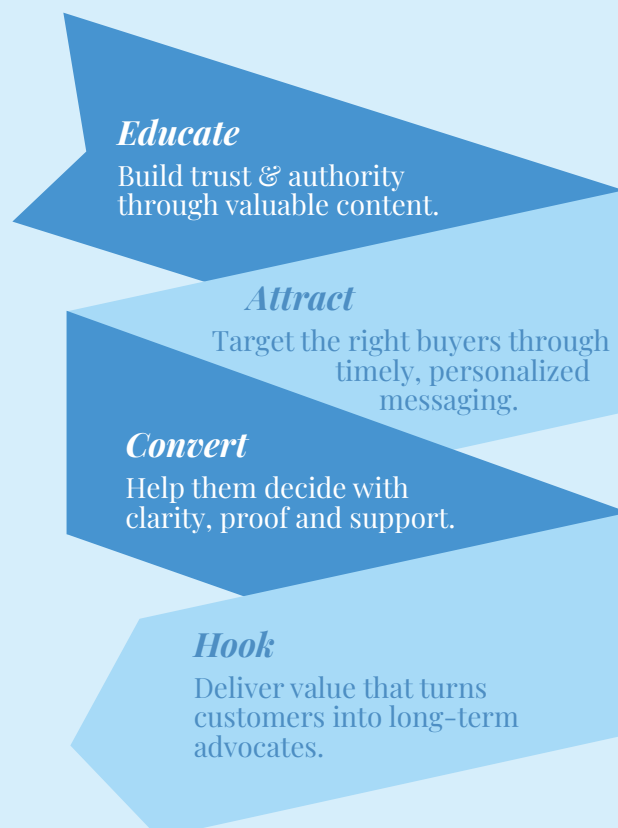
1. Inbound leads aren't consistent
2. Messaging fails to differentiate
3. Growth feels capped by team capacity
  4. ROI is difficult to measure
5. Sales and marketing remain out of sync

## Strategy Needs Structure: The EACH Model

To meet modern buyer expectations, commercial teams need more than ambition. They need structure. The **EACH model** outlines four critical phases of commercial execution:

Cloud leaders like Cloudflare, Snowflake and DigitalOcean build entire revenue engines around this flow, with content, product and GTM working as one.

In the Netherlands, fast-growing providers are adopting the same structure, combining ABM with inbound, automation with a human touch, and RevOps with clear accountability.



## Maturity on the Outside Demands Maturity on the Inside

### There's a clear parallel:

As the **market matures**, so must the **go-to-market engine**.

Buyers expect more relevance, speed, and confidence in their journey. This means marketing, sales and customer success must operate as one system.

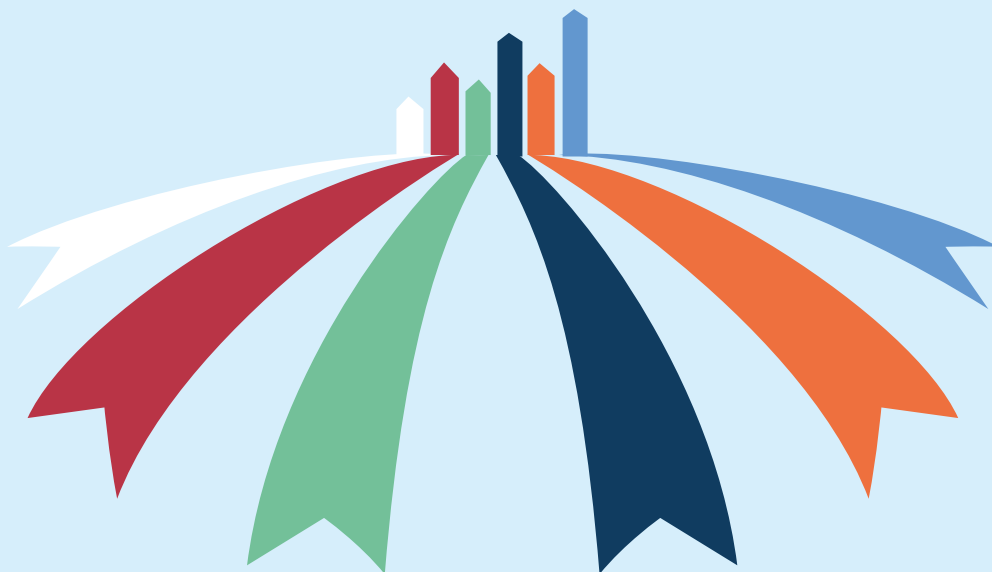
### That shift depends on a few key upgrades:

- **Deep customer insight:** grounded Ideal Customer Profiles (ICPs), not guesswork
  - **Agility in execution:** small tests, fast learning, smart iteration
  - **Integrated teams:** no more silos between awareness and retention
- **Revenue Operations:** unified metrics, shared systems, common goals
  - **Growth culture:** focused, outcome-driven, and collaborative

The best-performing teams aren't just reacting to change but building for it.

### The bottom line:

The cloud market has **outgrown** the traditional commercial model. It's time your strategy did too. This report shows where Dutch providers stand — and where to go next.



# *The Cloud Market Is Expanding Rapidly*

## Raising the Bar for Success

The cloud services industry is entering a new phase. Growth isn't slowing—far from it—but the game's rules are changing. Providers can no longer count on tailwinds alone. Today's **buyers expect more** control, value, and transparency, and are willing to switch fast if they don't get it.

For Dutch cloud companies, this creates both opportunity and pressure. The opportunity lies in tapping into a market poised to more than quintuple by 2034. The pressure comes from needing to serve increasingly sophisticated buyers in an increasingly competitive, globalized environment.

## Global Growth, But With Guardrails

The global cloud market is projected to cross \$900 billion in 2025 and reach over \$5 trillion by 2034.

**But this growth comes with new constraints:**

- **Value-focused buyers:** Since 2022, enterprise buyers have shifted from “cloud first” to “cloud fit.” Every purchase now requires a clear business case.
  - **Rising cost sensitivity:** 82% of IT leaders cite cost management as their top concern. Overspending and underutilization are now considered leadership risks, not just procurement issues.
  - **Talent shortage:** 78% of companies struggle to hire or retain skilled cloud engineers, architects, and commercial talent, resulting in a growing execution gap.

While SaaS continues to lead in spending, IaaS and PaaS drive most of the growth, especially in AI infrastructure, data platforms, and DevOps tools.

**The hyperscalers (AWS, Azure, GCP) still dominate, but smaller providers are gaining share in areas like:**

- Data residency & sovereignty
  - Performance tuning
- Developer-first experiences
- Industry-specific compliance

This shift has created space for niche players to win, but only if their go-to-market execution is equally sharp.



## Generative AI: The Growth Driver—and Reset Button

The rise of generative AI has triggered a structural wave in cloud consumption. Analysts estimate that **half of the cloud market's recent growth has come from GenAI workloads.**

**But AI isn't just expanding usage. It's reshaping buyer expectations:**

- Enterprise CTOs are rethinking infrastructure based on GPU availability and data gravity
  - Line-of-business buyers are increasingly influencing cloud strategy
  - Security, cost and vendor lock-in are back on the table as deal-breakers

**This creates two parallel imperatives:**

- Providers must **sell into new buying centers** with new narratives
- Their GTM teams must be able to **explain value beyond infrastructure metrics**

The AI boom is real—but it's not forgiving. It rewards clarity and penalizes complexity.

## Self-Educating Buyers, Shrinking Margins

Today's cloud buyers don't want more pitch decks but more proof.

According to Gartner, **77% of B2B buyers prefer to avoid sales during the research phase.** Instead, they educate themselves through documentation, peer reviews, free trials, and technical forums.

This means the first impression isn't a call. It's your website, documents, customer reviews, and onboarding flow.

**At the same time, customer acquisition costs are climbing fast:**

- **\$89 CPL** (Cost Per Lead) in North America
- **12.7% average conversion** from G2/TrustRadius
- **Up to 40% waste** from unqualified inbound

Cloud marketing is no longer a volume game. It's a **precision game**, and the winners are those who pair niche targeting with scalable systems.

## Implications for Dutch Cloud Providers

Dutch cloud providers are at the intersection of global pressure and regional complexity.  
The market is rich, but the bar is rising.

### In this new landscape:

1. **Execution speed** matters as much as product depth
2. **Revenue teams need tight integration**, not just alignment
3. **Content** isn't a campaign—it's a core commercial asset
4. **Retention** must be designed in from day one



The companies that grow will be the ones that treat GTM as a product, not just a function. That means investing in better systems, sharper messaging and tighter feedback loops across the funnel.

### The bottom line?

Cloud demand is strong. But it's getting smarter, stricter, and more selective.

Dutch providers have the tools to win—but only if they evolve their marketing, selling, and serving strategies.

The following section shows precisely where the pressure is building — and how Dutch commercial teams respond.

## 4. DIGITAL GROWTH PERSPECTIVES

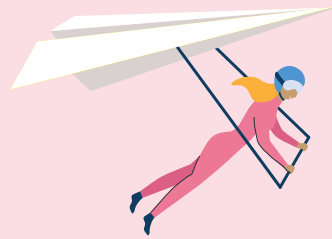
# *What's Holding Dutch Teams Back*

## And what to do about it

We surveyed commercial leaders across the Dutch cloud services ecosystem, from IaaS and managed hosting providers to hybrid platform and SaaS players. The goal was to understand the real-world blockers to growth and go-to-market efficiency.

The data was precise. Five challenge areas rose to the top, scoring high on difficulty and impact. These aren't just friction points. They're pressure points. And they're the best place to focus if you want to **grow in 2025**.

Participants rated each challenge from 1 (not a challenge) to 10 (extremely challenging). Based on their responses, we calculated the average score for each challenge, where a higher average indicated a more significant obstacle.



## 4.1. INCONSISTENT INBOUND LEAD GENERATION

**“Our pipeline depends on hustle and luck, not systems.”**

Building a reliable flow of qualified inbound leads was the most significant barrier for most respondents. Traditional tactics—events, referrals, basic SEO—aren’t producing at scale. What’s missing is a repeatable, measurable **engine** that brings the right buyers into the funnel.

### Symptoms:

- Lead volume fluctuates month to month
- Most leads come from personal networks or one-off campaigns
- Low conversion from website or paid traffic

### Strategic Fixes:

- Map your ICP and align messaging to specific buying stages
- Run a combined content + performance campaign (e.g. webinar + LinkedIn + remarketing)
- Invest in SEO and (gated) content assets tailored to the decision-maker, not just the developer

*Average Difficulty Rating* **7.5**

**10**

## 4.2. SCALING DEMAND GENERATION WITH LIMITED RESOURCES

**“We know what to do—  
but we don’t have the  
team or time to do it.”**

Most teams feel **stretched**. They’re small, juggling too many channels and struggling to prioritize. Growth becomes reactive, driven by quarterly targets rather than long-term systems.

### Symptoms:

- One-person marketing teams wearing five hats
- Demand gen efforts are siloed and underfunded
- No owned engine (e.g., content ops, ABM, automation) to build on

### Strategic Fixes:

- Pick one scalable play and go deep (e.g., inbound, outbound, or partner-led)
  - Build a lean campaign calendar with fixed rhythms
- Automate low-value tasks (e.g., nurture sequences, lead scoring) with RevOps to free up bandwidth

*Average Difficulty Rating* **6.8**

**10**

### 4.3. WEAK PARTNER & CHANNEL MARKETING STRATEGY

**“We want to scale through partners, but don’t have a clear playbook.”**

Dutch providers recognize the potential of indirect channels. However, few have built a repeatable strategy around partners, integrations, or marketplaces. As a result, the partner motion underperforms or never gets off the ground.

#### Symptoms:

- Few (or zero) active, engaged partners
- No co-marketing or co-selling structure
- Partner acquisition is ad hoc, not targeted

#### Strategic Fixes:

- Start with 3–5 lighthouse partners with aligned ICPs
- Define a shared success model (leads, enablement, collateral)
- Create a lightweight partner portal or campaign-in-a-box to activate quickly

*Average Difficulty Rating* **6.6**

**10**

## 4.4. LACK OF DIFFERENTIATION IN A CROWDED MARKET

**“We sound like everyone else.”**

Positioning is a real challenge, especially for infrastructure-focused companies. In a market where performance, uptime, and security are table stakes, the real question is: **Why you?**

### Symptoms:

- Generic messaging (“secure, scalable, reliable”)
- Website fails to speak to specific personas or use cases
  - Sales decks focus on features, not outcomes

### Strategic Fixes:

- Define your unique value in a particular audience (e.g., eCommerce CTOs, data-heavy SaaS startups)
- Test sharp positioning statements in paid and outbound campaigns
- Use case studies, proof points, and pricing simplicity to reinforce your edge

*Average Difficulty Rating* **6.5**

**10**

## 4.5. STRUGGLING TO HIT COMMERCIAL GROWTH TARGETS

**“We have a pipeline—but it’s not converting fast enough.”**

Strong growth ambitions are often met, but targets are usually missed. The issue isn’t intent – it’s conversion. Without precise forecasting, structured deal movement, and strong sales–marketing alignment, growth remains neutral.

### Symptoms:

- Pipeline looks big, but the actual closed revenue lags
- No clear ownership of MQL > SQL > Opportunity flow
- Forecasting accuracy is low; deals drag without momentum

### Strategic Fixes:

- Run monthly pipeline reviews tied to lead source, conversion rate, and cycle time
  - Align sales and marketing with shared definitions and SLAs
- Introduce sales enablement content: TCO calculators, comparison guides, and objection handlers

*Average Difficulty Rating* **6.1**

**10**

# Summary: Where to Focus



These five areas are where the pressure is—and where the opportunity lies.

## *Challenge*

Inbound Lead Generation

Scaling Demand with Limited Resources

Partner & Channel Strategy

Differentiation & Positioning

Hitting Growth Target

## *Difficulty*

7.5

6.8

6.6

6.5

6.1

## *Strategic Lever*

Build a scalable content & performance engine

Simplify and automate core campaigns

Activate 3–5 lighthouse partners

Sharpen your ICP, value prop, and narrative

Align teams, define funnel stages, and track conversion

# *What top Cloud Companies do Differently*

## And how to Apply it in the Dutch Market

High-growing cloud companies across the US, APAC, and EMEA have developed playbooks that cut through the noise, shorten sales cycles, and drive sustained growth.

They don't just spend more.

They work smarter—with tighter ICPs, sharper narratives, and revenue teams that **operate as a single system.**

Here are five standout strategies used by global leaders, backed by results and ready to adapt for Dutch cloud providers.



## 5.1. PRODUCT-LED GROWTH (PLG): BUILD TRUST BEFORE THE PITCH



Instead of relying on traditional sales, PLG companies use their product as the primary acquisition driver. Self-serve signups, free tiers, and usage-based upgrades create a seamless entry path, especially for technical buyers who prefer to test before they talk.

### Why it works:

- Reduces CAC by letting users onboard themselves
- Turns product usage data into sales signals
- Establishes trust early through value, not persuasion

### What to adapt:

- Launch a free trial or freemium plan
- Add live onboarding support to increase activation
- Trigger SDR or CSM outreach based on usage milestones

### Used by:

DigitalOcean, Cloudflare, Datadog



## 5.2. SHARPENED ICP AND MESSAGING FOCUS



In a saturated market, generalist positioning is ignored. The fastest-growing providers zoom in on specific customer profiles: dev teams, creative agencies, and SaaS ops leaders — and speak their language.

### Why it works:

- Boosts conversion by matching the message to the pain
- Lowers acquisition costs with more efficient targeting
- Creates repeatable playbooks per segment

### What to adapt:

- Define 2–3 high-fit ICPs
- Build segment-specific messaging, landing pages, and outbound scripts
- Map content to real-world roles and challenges

### Used by:

DigitalOcean, Cloudflare, Datadog

### 5.3. ALWAYS-ON CONTENT, INSTEAD OF ONE-OFF CAMPAIGNS

Top performers don't treat content as filler. They treat it as their **engine**. Developer tutorials, ROI calculators, documentation hubs, case studies, and comparison pages all drive awareness and lower friction.

#### Why it works:

- Supports self-educating buyers
- Powers inbound and nurtures ABM
- Builds trust while shortening sales cycles

#### What to adapt:

- Turn your sales pitch into a comparison guide
- Publish 1 article/month on customer problems (not just features)
- Repurpose long-form content into LinkedIn snippets and nurture emails

#### Used by:

Snowflake, HashiCorp, Salesforce

### 5.4. UNIFIED REVENUE OPERATIONS (REVOPS) ACROSS TEAMS

The best cloud companies break down silos between marketing, sales, and customer success. Instead of separate teams with separate goals, they operate as a **unified revenue team** with shared metrics and dashboards.

#### Why it works:

- Improves forecasting and accountability
- Reduces drop-off between handoffs
- Aligns effort across the whole customer journey

#### What to adapt:

- Set shared KPIs for MQL→SQL→Closed
- Implement one shared pipeline dashboard
- Hold weekly revenue syncs with sales, marketing, and success leads

#### Used by:

DigitalOcean, Cloudflare, Datadog

## 5.5. STRATEGIC USE OF PARTNER ECOSYSTEMS

High-performing providers build growth through others. Their partner strategies go beyond logos—they support resellers, co-marketing partners, integration providers, and ecosystem plays with **structure and scalability**.

### Why it works:

- Adds distribution without hiring more salespeople
- Builds credibility through trusted connections
- Scales reach into niche markets (e.g., regulated industries, regional buyer groups)

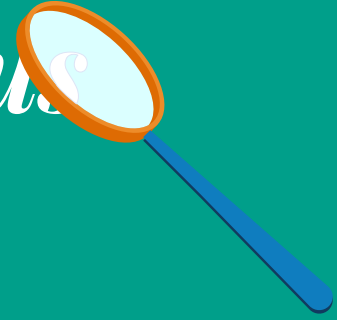
### What to adapt:

- Identify partners already serving your ICP
- Develop co-marketing templates and integration guides
- Align on a shared value prop and measurable goals

### Used by:

AWS, Twilio, Atlassian

# Summary: Where to Focus



<i>Practice</i>	<i>Goal</i>	<i>Benefit</i>
Product-Led Growth (PLG)	Low-friction acquisition	Faster adoption, better sales signals
ICP + Segment-Specific Messaging	Sharper targeting	Lower CAC, higher conversion
Always-On Content Ops	Scalable inbound + nurture	Shorter sales cycles, increased trust
Unified Revenue Operations (RevOps)	Full-funnel alignment	Stronger forecasting, fewer handoffs
Partner Ecosystem Strategy	Indirect scale	More reach with less cost

## Takeaway:

The difference isn't just budget, it's execution.

Top-tier cloud companies run clear plays, measure results, and **build for scale**. Dutch cloud providers can do the same by choosing 1–2 of these strategies and executing them well.

Next, we'll help you diagnose where you stand—and where to go next.

## 6. DIGITAL GROWTH DIAGNOSTIC

# *From Benchmark to Action:*

## Evaluate Your Growth Maturity in Minutes



The Dutch cloud hosting market is entering a pivotal phase. With global demand rising and AI driving rapid transformation, the opportunity is clear, but so are the barriers.

We surveyed leading cloud providers and benchmarked them against global best practices. The result? A clear view of where growth is being held back—and how to fix it.

### The 5 Big Growth Challenges in the Netherlands:

- 1**  **Inconsistent inbound lead generation**  
 **Fix:** Launch a scalable content + paid performance engine
- 2**  **Scaling demand with limited resources**  
 **Fix:** Focus, RevOps automation, and go deep on 1–2 channels
- 3**  **No structured partner or channel marketing**  
 **Fix:** Start with 3–5 lighthouse partners and build a simple playbook
- 4**  **Lack of differentiation in a crowded market**  
 **Fix:** Sharpen your ICP and tailor your messaging to them
- 5**  **Struggling to hit commercial targets**  
 **Fix:** Align revenue teams with shared KPIs, definitions, and dashboards

## What Global Leaders Are Doing Differently

Cloud winners—from Snowflake to Wasabi to GitLab—don't just spend more. They:

- Use **Product-Led Growth** to reduce CAC and drive adoption
  - Sharpen messaging to speak to **specific ICPs**
- Build **always-on content systems**, not one-off campaigns
- Operate through **RevOps**, aligning marketing, sales, and CS
- Scale smartly via **partner ecosystems** and co-marketing

## How to Apply It

Start with the **Digital Growth Diagnostic**.

In 6–8 minutes, you will:

- Benchmark your maturity across 28 levers
  - Find where your funnel is leaking
- Get targeted next steps based on global strategies

Take the scan:

*Visit [begradient.com/sectoren/it-cloud](https://begradient.com/sectoren/it-cloud)*

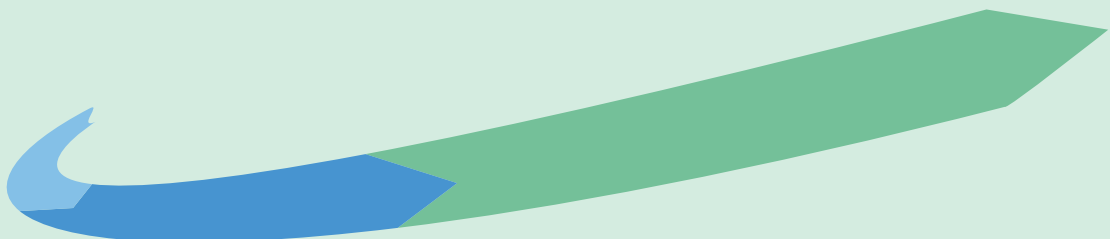
## One Final Thought

Growth isn't a mystery. It's a system.

The Dutch cloud ecosystem has the talent, ambition, and product depth to lead.

The next step is structure.

Let's build the systems that scale.



## APPENDIX A: DATA SOURCES AND REFERENCES

This report comprehensively integrates insights from global research providers, platform case studies, user communities, and first-party data to examine cloud hosting growth and marketing. The findings are grounded in both international trends and local Dutch market dynamics.

### I. Proprietary Research

#### **Gradient Dutch Cloud Buyer Survey (Q2, 2025)**

Gradient conducted the original research, which targeted Dutch IT and business decision-makers. The survey captured detailed insights on challenges in inbound lead generation, demand scaling, partner strategy development, and commercial growth. This dataset provides localized context for interpreting global cloud marketing trends within the Dutch market.

### II. Market Intelligence & Research Firms

#### **Gartner**

Market sizing, multi-cloud strategy trends, and Magic Quadrant assessments.

#### **Statista**

Cloud adoption rates, global growth projections, and sector-specific data.

#### **McKinsey & Company**

Enterprise transformation insights and migration benchmarking.

#### **Canalys**

Vendor performance and regional market share analyses.

#### **IDC FutureScape Reports**

Strategic forecasts for cloud infrastructure and digital transformation.

#### **Bain & Company**

Cloud pricing models and enterprise procurement behavior.

#### **Harvard Business Review**

Frameworks on trust, positioning, and value-based B2B messaging.

### III. Technology Providers & Benchmark Sources

#### **AWS & Microsoft Azure Case Studies**

Implementation outcomes, customer success narratives, and solution architectures.

#### **LinkedIn B2B Institute**

Insights into brand building and B2B marketing effectiveness.

#### **HubSpot State of Marketing Report**

Benchmarks for lead generation, content marketing, and CAC metrics.

### **OpenView PLG Benchmarks**

Performance data on product-led growth models and onboarding KPIs.

### **Stripe Atlas**

Infrastructure adoption trends among startup ecosystems.

### **Salesloft & Outreach.io**

GTM automation benchmarks and sales workflow optimization.

## **IV. Community & Developer Ecosystems**

### **Reddit Developer Communities**

Qualitative insights into cloud tooling, developer onboarding, and support challenges.

### **YouTube Influencer Campaigns**

Examples of developer-focused marketing and technical content activation.

### **Product Hunt & IndieHackers**

Growth stories, launch experiments, and self-serve SaaS tactics.

## **V. Analytics, CRO & Review Platforms**

### **ConversionXL (CXL)**

CRO best practices, digital funnel benchmarks, and UX testing methodology.

### **Google Optimize Case Studies**

A/B testing strategies and iterative optimization approaches.

### **G2 & Capterra**

Customer sentiment analysis and comparative feature assessments.

### **Twilio Segment & Mixpanel**

Behavioral analytics frameworks for user journey optimization.

# *Cloud Growth Starts Here*

Digital acceleration offers cloud providers a clear chance to scale smarter, right now. This benchmark reveals where those opportunities are. Use the free Digital Growth Diagnostic to assess where your organisation stands across brand, lead flow, data, and customer growth.

## **Why work with Gradient?**

### **B2B Growth Accelerator**

We've ranked among the top of the Emerce 100 for five years in a row.

### **Platinum HubSpot Partner**

HubSpot is one of the key tools for digitising marketing, sales, and customer management. We're one of the few Platinum partners in the Netherlands.

### **Proven Track Record in Cloud & IT**

We focus exclusively on B2B and work closely with fast-growing cloud providers and IT companies. That industry-specific experience makes all the difference.

## **Ready to Accelerate Your Digital Growth?**

Take the Digital Growth Diagnostic at  
*[begradiant.com/sectoren/it-cloud](http://begradiant.com/sectoren/it-cloud)*

