Block Club

B2B Tech Brands Have Conquered Product.

Now what?

As AI flattens product feature differentiation, brand presents a rare opportunity to stand out and win the future—today.

Executive Summary

Brand has always mattered. But in today's B2B tech market, it's gaining momentum. Why? Because it lasts. While product features that can be matched or surpassed, brand builds over time, deepens with consistency, and stays top of mind when buyers are ready to make a move.

As AI accelerates product development and compresses go-to-market timelines, the old levers of differentiation—including technical features, faster shipping, and first-mover advantage—are getting harder to defend. In a world where anyone can build quickly, what you build still matters, but how buyers see it, remember it, and trust it matters more.

That's where brand comes in.

A strong brand shapes your values, clarifies your story, and inspires confidence in your buyers. It's what separates a good but easily replicable product from a valued, truly differentiated partner.

Brand is a path to long-term competitive advantage.

To understand how marketing leaders are navigating this change, we surveyed 60 CMOs and VPs of marketing at B2B SaaS and software companies across the U.S., Canada, and the U.K. We wanted to know:

> What does **lasting brand strategy** look like in the early era of AI?

Here's what we found:

01 Competitive moats are shrinking.

As AI-fueled engineering teams move faster, product-based differentiation becomes increasingly vulnerable:

72% of companies still rely on product features to differentiate.

30% already acknowledge that those features are easily copied.

02 Brand is the new defensible territory.

In a market where product advantages fade fast, brand becomes an increasingly durable edge.

Customer-led storytelling outperforms feature-first messaging by **14 points in tactical effectiveness rankings.**

72% of marketers surveyed are investing in thought leadership to showcase distinct expertise.

03 Most B2B tech companies aren't ready.

Only **8% feel confident competing on brand alone.** That means **92% are vulnerable as feature differentiation erodes**. But buyers highly value brand investments:

- They reward clarity, consistency, and category leadership.
- They choose based on trust, values, and connection, not just specs.
- They are significantly influenced by branded content in their final purchase decision.

04 In a perfect world, budget would go to three main pillars.

When we asked marketing leaders how they'd invest an unlimited budget, the results were telling: Brand rounded out each of the top three picks. They named **customer experience**, **thought leadership**, and **community building** as their go-to strategies if budget were no object.

Most product features, to some degree, can be copied. Brand and audience perception, for the most part, cannot.

Now is the moment to act.

As AI speeds up engineering teams, it will also realize gains for marketing teams. B2B marketing leaders are using AI gains to focus on what can't be automated: emotional resonance and executive voice.

Vanessa Schneider, head of marketing at **Descript**, says her marketing team is heads down in learning how to use AI to strengthen their team, which may change how they work but does not change their core value. "As marketers, the core thing we are is audience knowers. Everything moves outward from there."

As the use of AI makes technical marketing work more accessible, Charles Lim, head of brand and communications at **PartnerStack**, notes, "Taste hasn't always been valued in B2B tech marketing as much as technical skills. As brands race to compete more heavily on AI output, marketers will need really good taste, and the human ability to articulate it." It's critical that AI output is thoughtfully steered to genuinely resonate with buyers and ultimately drive revenue.

"No matter how noisy the market gets," says Colin Campbell, head of content and community at **Pixis**, "there will always be a way to build a moat by doing something remarkable. That's the basis of great marketing. But to know what's worthy of remark, you need a deep understanding of your space and your audience, to know what the current is so you can swim against it, or to really zig when everyone else is zagging."

Winning on brand means aligning your business behind a clear identity, staked to clear white space, and using it to drive more substantial margin, higher retention, and more enterprise value. With both product and marketing teams increasing speed and output, truly differentiated branding is more valuable than ever.

Let's dive in.

01

What's next for B2B tech brand differentiation?

For years, the playbook in B2B tech was clear: Build a better product, add more features, and ship faster than your competitors. That strategy worked when technical advantages were slow to replicate.

But the landscape is shifting. AI is speeding development, tightening go-to-market timelines, and shrinking the gap between idea and execution. Tech companies lead all sectors in AI adoption, with **88% of tech companies** utilizing generative AI. That's not a future forecast. It's happening right now.

While this acceleration is exciting, it's also flattening the field. When anyone can launch new capabilities overnight, product-based advantages don't hold for long. Features become easier to match and harder to build a moat around.

Most product features, to some degree, can be copied. Brand, for the most part, cannot.

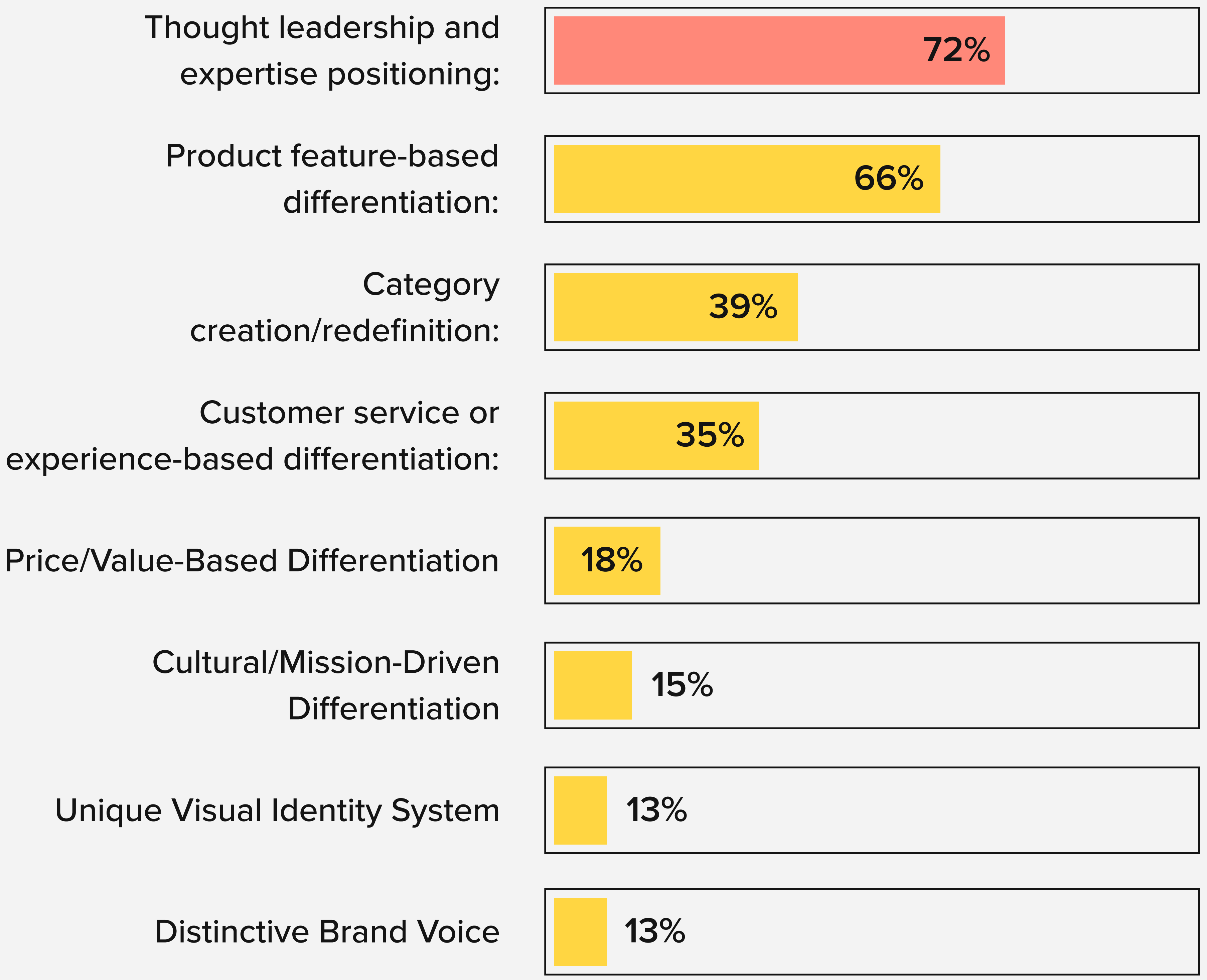
Brand is how your audience understands your value, remembers your story, and decides to trust you before a sales conversation even starts. It's the one thing AI can't copy. And in a market where product differentiation is an increasingly threatened moat, brand's moat remains.

72% of our respondents confirmed they're actively investing in thought leadership as a top brand differentiation tactic.

Jenna Crane, VP of marketing at Triple Whale, agrees with this investment. "It's about the human touch. There's so much AI out there. **People want real human perspectives and real insights from specific and trusted points of view. We're doubling down on that.** Triple Whale data comes from over $65 billion in tracked revenue, and we're leaning into that data differentiation to provide as much value as possible through unique insights as a brand. We're doing the same with our executive thought leadership."

Lead with something competitors can't copy: your brand.

Which of the following best describes your company's current approach to brand differentiation?



02

AI is the catalyst for brand's elevated role

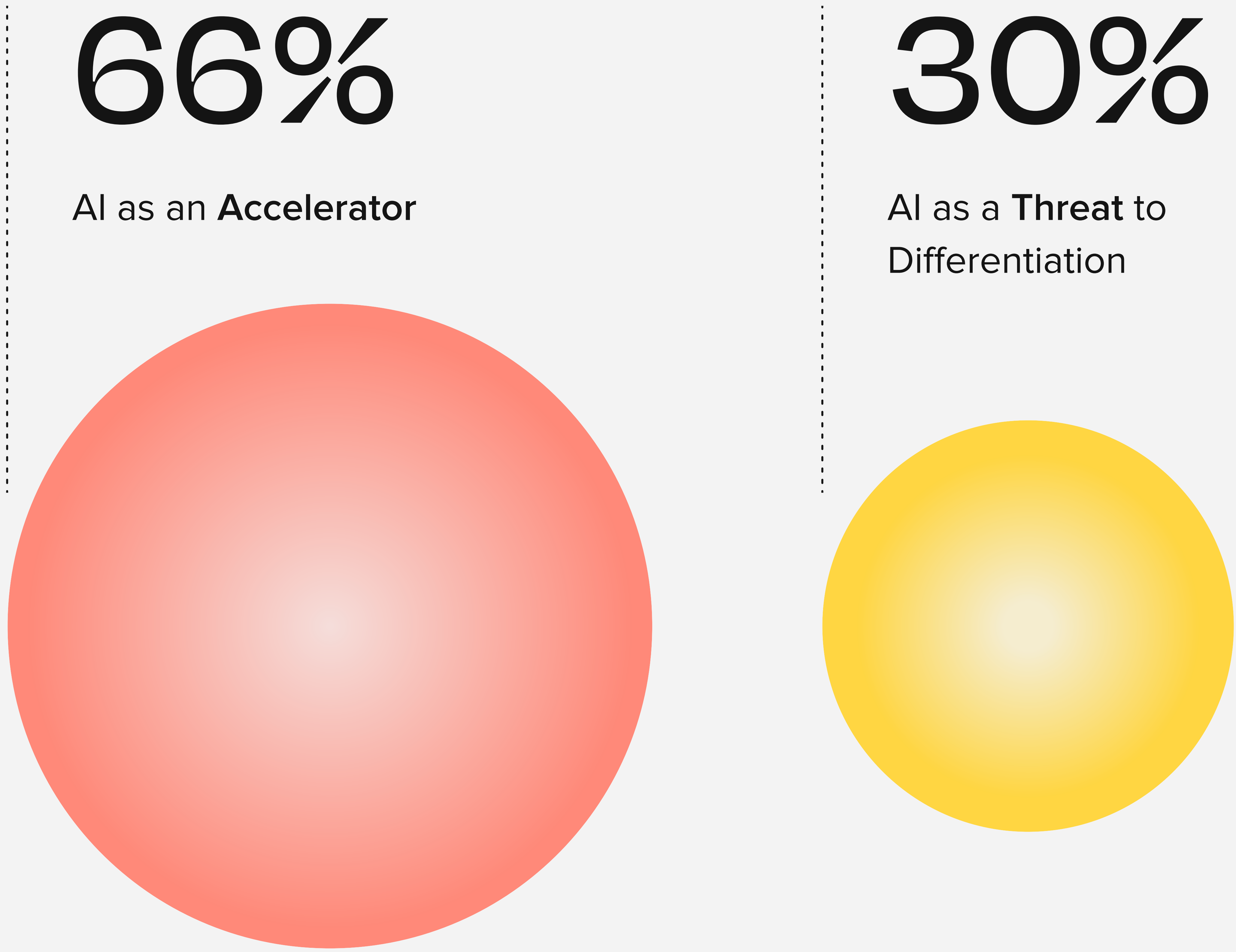
According to our survey, **66% of SaaS and software marketing leaders say AI is freeing them up to focus on high-value work. But 30% percent worry it also makes product features easier to copy.**

They're both right. AI increases speed *and* flattens differentiation.

But it also provides an opportunity. With more bandwidth and fewer blockers, marketers have a rare opening to elevate brand as the one part of the business that can't be auto-generated. Alex Esquivel, head of marketing at Luma Health, noted, "With AI, anyone can create something that's very surface level. There's a huge opportunity for brand right now."

Within companies that carry brand debt from historically undervaluing or underinvesting in brand, marketing teams may need to push leadership to see the growing opportunity in B2B tech.

Perceptions of AI's Impact on Differentiation in B2B Tech

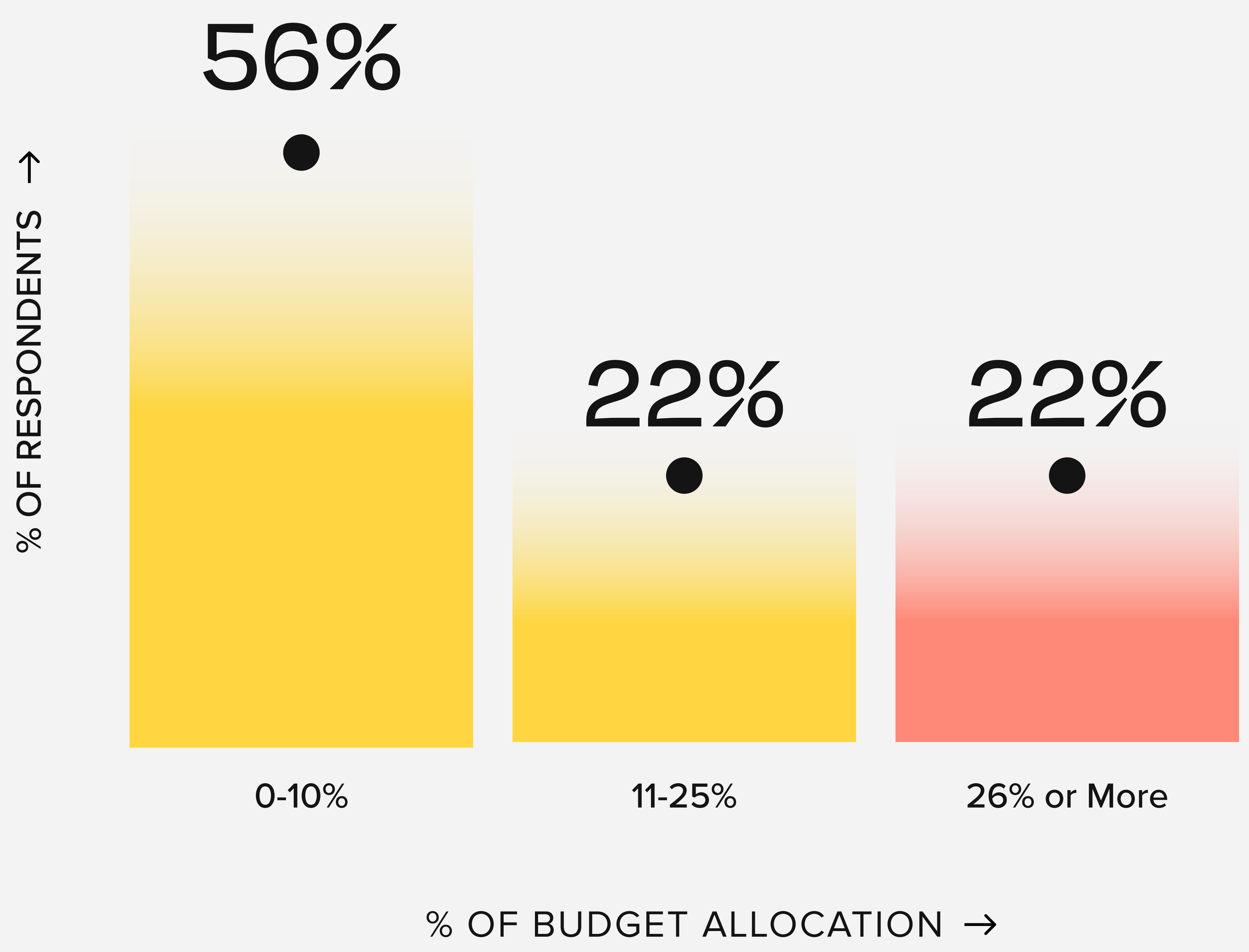


B2B tech teams are leaning into the opportunity.

Twenty-two percent of respondents already dedicate more than a quarter of their marketing budget to brand-building.

As AI increases the speed of all teams, trust established by brand remains a strong moat.

Current Brand Budget Allocation Among B2B Tech Marketers



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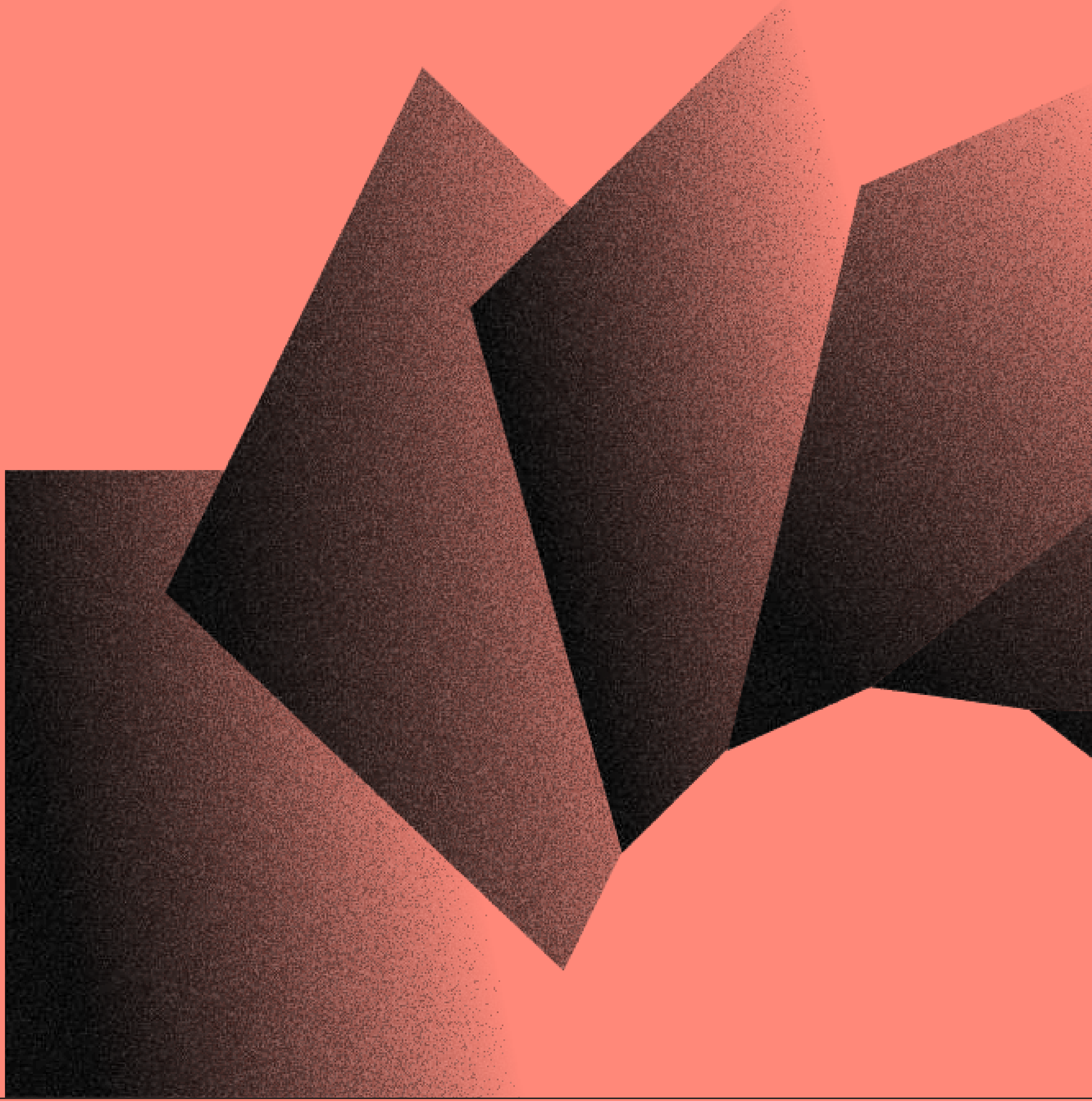
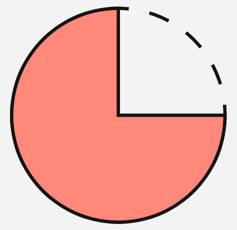
Leaning into brand pays off

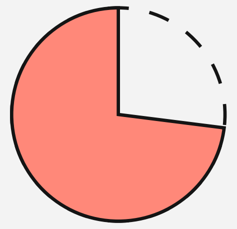


When we asked B2B tech marketers what's delivering the strongest results, **customer-led storytelling came out on top**, outperforming product-centric messaging by **14 points (66% vs. 52%)**.

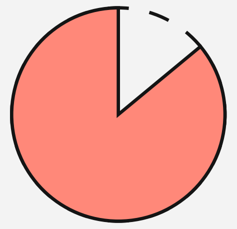
B2B buyers say so:



75% say compelling brand content has led them to explore products they weren't initially considering



73% of decision-makers trust thought leadership more than traditional marketing



86% are more likely to include brands with strong thought leadership in RFPs

> I come from a background in customer marketing. I'm the biggest believer in customer storytelling. I want everybody at our company to be able to fire off five great customer stories at the drop of a hat. That's what will separate out the fluffy AI companies from those that succeed—they can constantly tell stories about how they're making a dent in people's business.

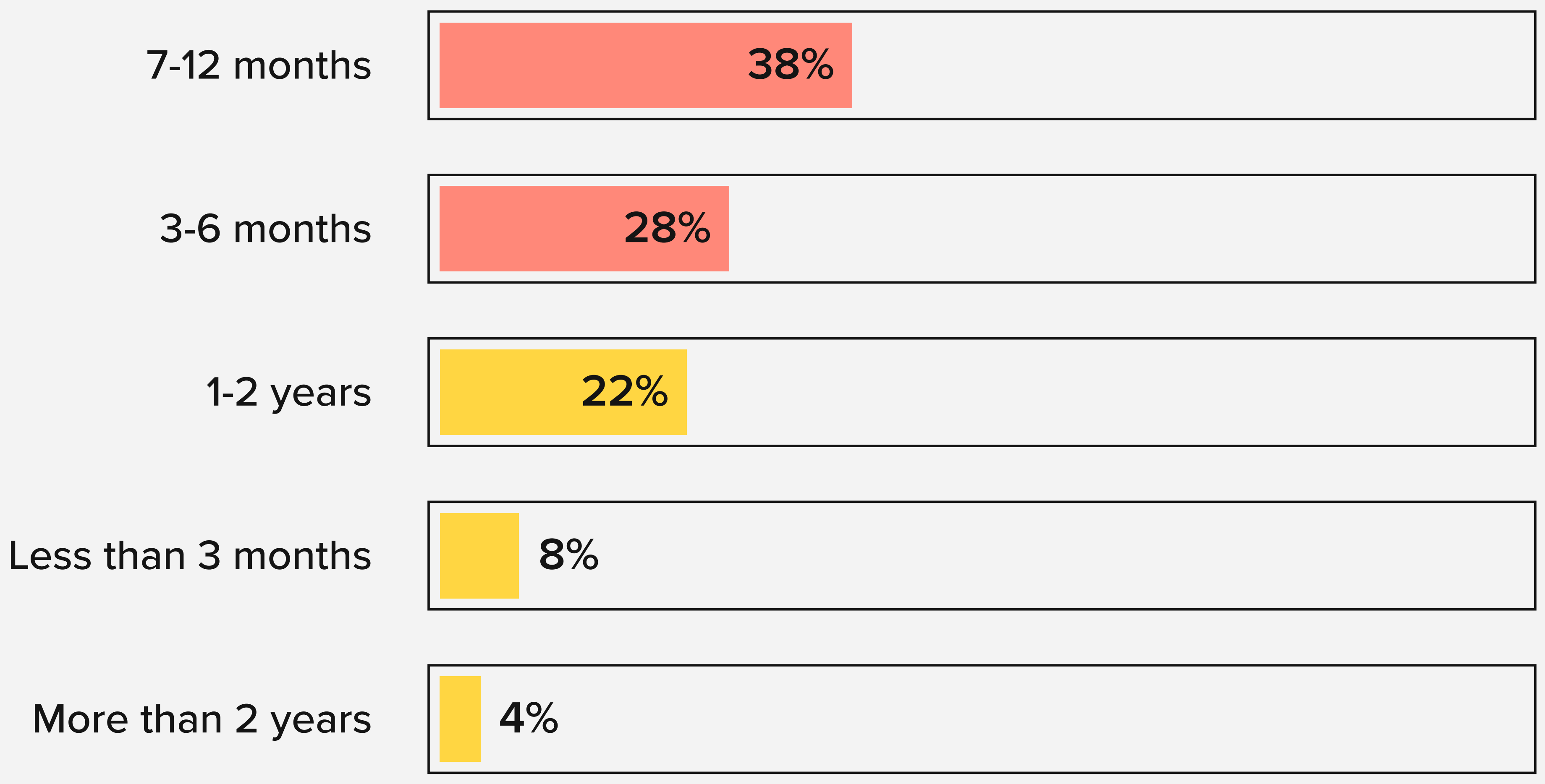
- Maura Rivera, CMO, Qualified

> The stories you're delivering matter, but also how you deliver them. How you make people feel—before, during, and after buying your product—is everything. Buyers are heavily influenced by the experience of your brand.

- Colin Campbell, Head of Content and Community, Pixis

Brand also pays off more quickly than you might expect. Most marketing leaders report meaningful impact from brand-building **within three to 12 months**. That's fast enough to support quarterly goals and influence pipeline.

How long do you typically expect it to take to see measurable results from a brand initiative?



> We recently launched an "Operator in Residence" role at Triple Whale as an internal representative of how our target audience thinks. We don't do thought leadership just for the sake of hearing ourselves talk—it's to drive value for our audience. You have to dial in on what drives value for your audience, and tell the stories that matter to them.

- Jenna Crane, VP of Marketing, Triple Whale

Leadership that Leads with Brand

"Our founder and former CEO Andrew, has a really good feel for culture. He started Groupon, and part of Groupon's success came from its writing style and voice, and the way their emails were a treat in everyone's inbox. From that experience, he cultivated a very high standard and high regard for the role that brand voice can play in differentiating a company, especially when there are clones nipping at your heels as a brand. Andrew fostered that value of brand at Descript, which very much continues today."

- Vanessa Schneider, Head of Marketing, Descript

"Our founder and CEO is obsessed with how to push the envelope with storytelling. He was previously in the CMO role at Salesforce. He's always pushing—how do we always stay relevant from a brand perspective, and always showcase our latest and greatest? The only way to operate is to look at your brand as a living, breathing asset. You should be constantly evolving your brand assets, or you'll become irrelevant in this fast-moving landscape."

- Maura Rivera, CMO, Qualified

The Competitive Cost of Brand Debt

"AI helps marketing teams amplify and scale faster. But AI can't create a brand foundation, it can't create the human element, it can't create the stories you choose to tell. **The audience can tell when the content is not authentic.** The brands that haven't focused on identity and positioning enough early on will be behind, and they're going to be in a race to catch up."

- Lauren Berkemeyer, CMO, YuLife

"At the end of the day, brand is a feeling, and it's extremely important. **Brand helps build trust.** It's always going to be **tougher for a company without that foundation to compete.**"

- Sunayana Vatassery, Director of Marketing, Gremlin

04

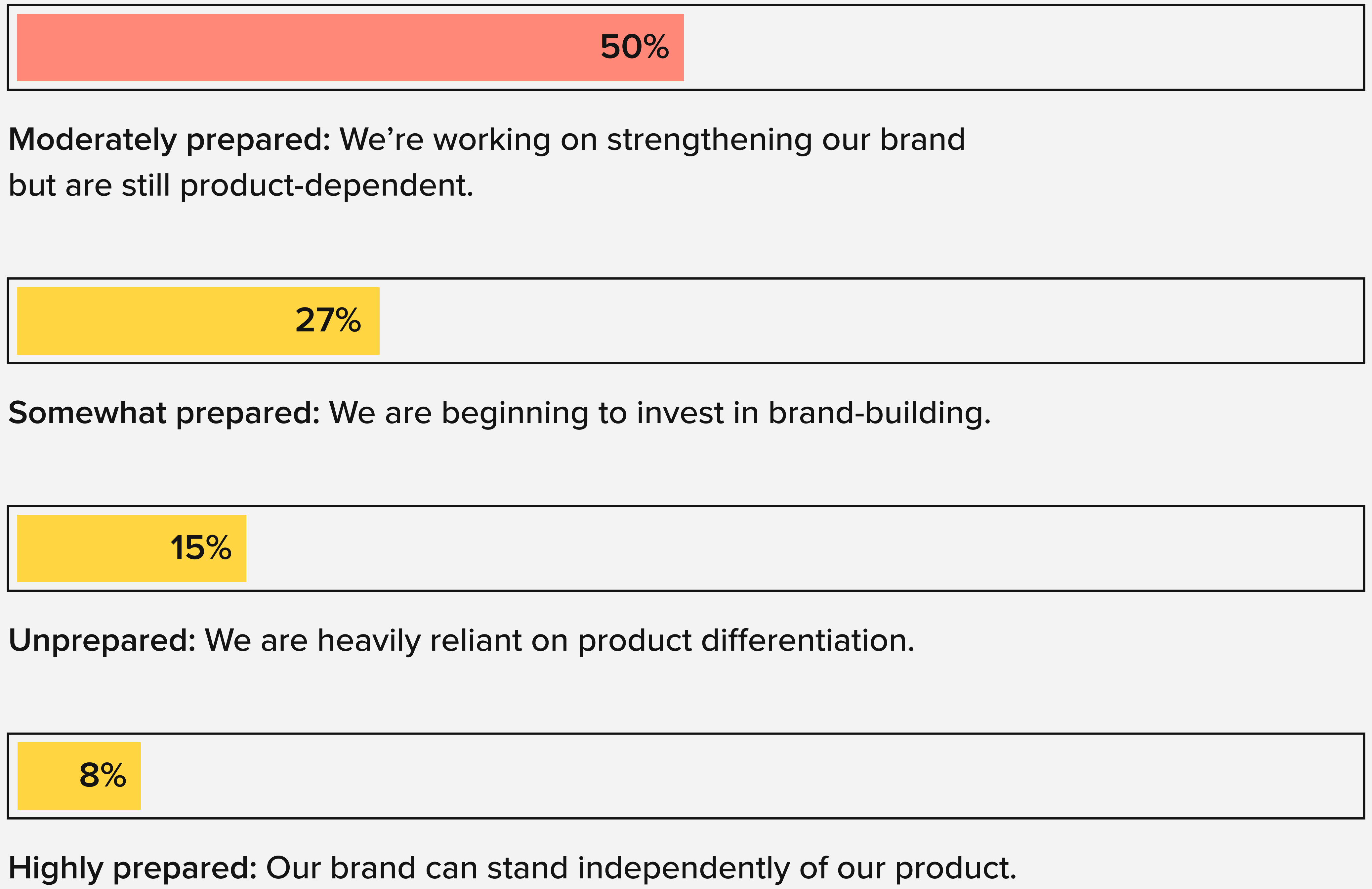
There's a window of opportunity

(for bold brands)

Only 8% of marketing leaders feel fully prepared to compete on brand. The rest are still catching up, which makes this a rare and timely opportunity for those willing to lean in.

Companies with strong brands deliver a 74% higher return on brand marketing investment and hold 46% more market share than their weaker counterparts.

How would you rate your organization's current preparedness to compete primarily on brand rather than product features?



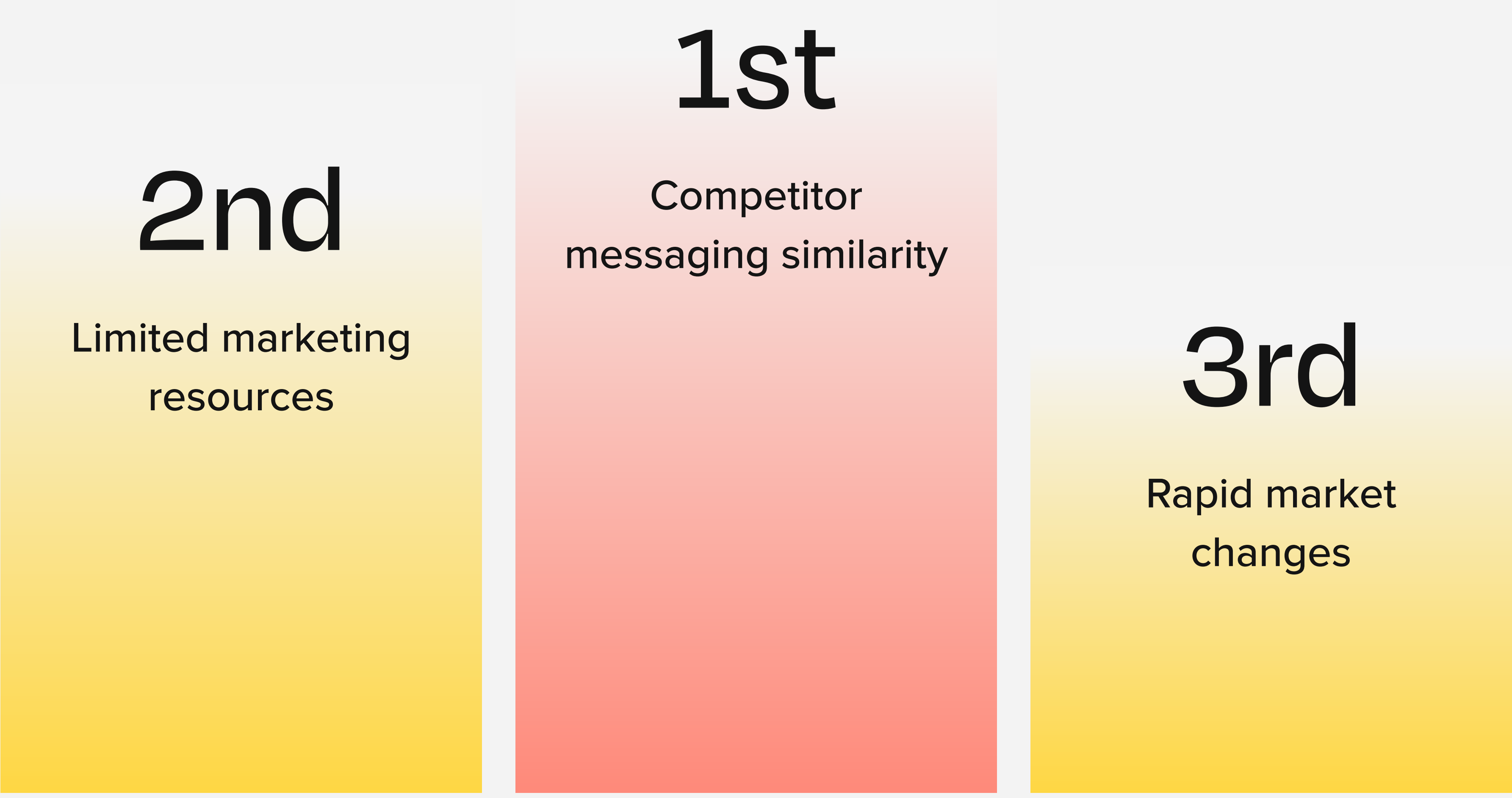
Most B2B tech companies spend less than 25% of their marketing budgets on brand. But that's changing. eMarketer reports that 40% of B2B marketers plan to increase brand spend this year.

But increasing spend alone won't set your brand apart. To win on brand, you have to be different. According to our data, messaging sameness is a real problem. When we asked respondents to rank the challenges they face in terms of brand differentiation, nearly one-third ranked "competitor messaging similarity" as the #1 obstacle (30%). When everyone leads with indistinguishable jargon and proof points, buyers tune out.

Strong, strategic branding breaks through the noise. Sometimes, that means taking a big swing.

There's also a talent advantage to consider. Teams that prioritize brand now will attract the thinkers and makers who want to work on something meaningful and help build something that lasts, creating a flywheel of innovation and boldness that perpetuates competitive advantage.

Rank the following challenges to brand differentiation in your tech category



4th Measuring brand impact

5th Technical complexity of products

6th Internal alignment challenges

7th Shift toward commoditization

Brand Debt: The cumulative negative impact on a brand's long-term health from prioritizing short-term gains over consistent brand building.

Why Is Brand Debt a Problem?

Erosion of Brand Equity: Brand debt can erode the value of a brand over time, making it harder to attract customers, command premium prices, and compete effectively.

Increased Marketing Costs: Fixing brand debt often requires significant time, effort, and resources to realign the brand with its core identity. This can lead to higher marketing costs in the long run.

Damage to Brand Trust: Inconsistent messaging and a lack of clarity can erode customer trust, making it difficult to build long-term relationships.

Difficulty in Achieving Long-Term Goals: A weak or inconsistent brand can hinder a company's ability to achieve its long-term strategic objectives such as market leadership or sustainable growth.

81% of B2B buyers say a brand's content has significantly influenced a purchasing decision.

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Integrating a brand-first culture

A brand-first strategy isn't just a marketing initiative, it's an organizational shift. It requires buy-in, including from the CFO. That means linking brand to metrics like margin, efficiency, and enterprise value.

Budgeting for Brand-Led Growth

Brand-first isn't just about a bigger budget, it's about a smarter one.
Here's what to keep in mind:

- **Shift from "brand as spend" to "investing in brand."** Brand reduces customer acquisition cost (CAC), protects margin, and boosts revenue quality. Treat it like R&D: compounding, strategic, long-term.
- **Balance performance *and* brand.** Don't go cold turkey. Keep demand gen strong while slowly rebalancing toward sustainable brand lift.
- **Fund the foundation.** Invest in strategy: positioning, messaging, identity, research, and internal alignment.
- **Budget for leading indicators.** The impact of brand shows up early in share of voice (SOV), branded search, direct traffic, and sales velocity, even if attribution lags.
- **Allow for testing and iteration.** Brand sharpens with feedback. Budget for creative pilots, message testing, and lift studies.
- **Activate the entire organization.** Brand only works when it's lived across teams. Budget for new sales decks, employee onboarding, and internal campaigns.
- **Benchmark and align.** Don't wing it. Know where you stand and set realistic timelines (think 6–18 months). Keep stakeholders aligned.

To unlock the resources to do branding right, CMOs need to reframe pushback into clear business cases:

QUESTION	**"If I gave you 10% more budget, how would you spend it, and what metrics would prove it's working?"**
TRANSLATION	Are you disciplined and ROI-focused?
RESPONSE	"I'd invest in scalable brand-building assets like owned content, thought leadership, and executive POV. Metrics would include growth in branded search, sales velocity, and conversion. Strong brands deliver a **74% higher** return on brand marketing investment and hold 46% more market share."
QUESTION	**"Can you quantify brand's impact on margin, not just pipeline?"**
TRANSLATION	Will it help us win better deals?
RESPONSE	"When our brand is strong, we win more deals at higher prices with less discounting. A strong brand also shortens deal cycles and reduces reliance on heavy sales incentives."
QUESTION	**"Why now?"**
TRANSLATION	What's the cost of waiting?
RESPONSE	"Because the race to replicate features has already begun. Few companies are prepared to compete on brand. This presents a distinct opportunity to fill the whitespace. Acting now gives us the edge."

Brand is your most durable advantage. It belongs at the strategy table. CMOs who tie brand to business levers don't just earn buy-in, they build momentum.

67% of B2B marketing leaders surveyed by LinkedIn in 2024 had increased brand-building budgets, with 88% of surveyed CMOs pushing for bolder creative campaigns.

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The path to brand leadership

When it comes to lasting differentiation, the top three highest impact brand investments our survey respondents would like to increase spend on are:

Thought Leadership 1st

Because expertise builds trust.

Community 2nd

Because people rally around what matters.

Customer Experience 3rd

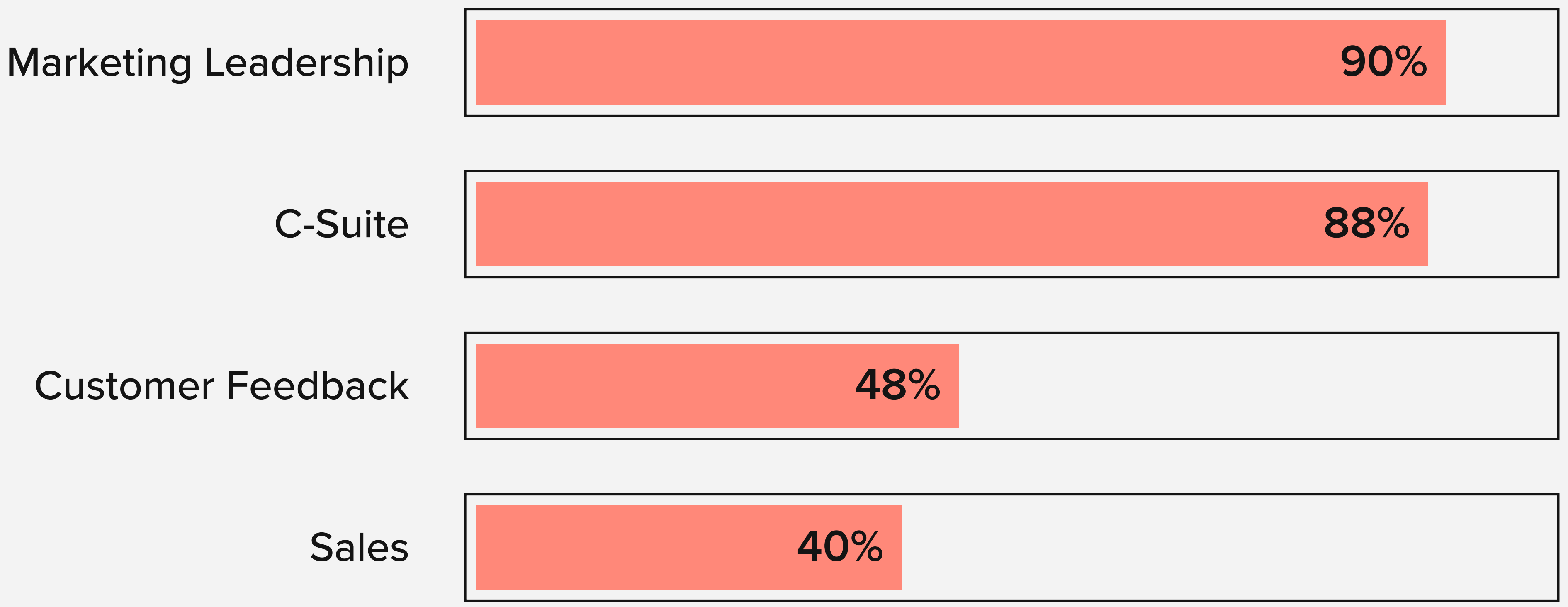
Because how you treat people *is* the product.

Yet many struggle to re-strategize as frequently as they'd like, with only 34% revisiting brand strategy annually. Fewer still are able to involve the whole organization in brand strategy:

- Only **40%** include sales in brand development.
- Just **48%** collect direct customer input.

While organizational dynamics can make broad stakeholder involvement challenging, brands that successfully involve sales and gather direct customer input in their strategy development will see stronger internal alignment and market resonance.

Stakeholder Involvement in Brand Strategy



How to Build Brand (Without Disrupting Your Pipeline)

Brand doesn't replace performance marketing; it reinforces it. This roadmap outlines how to transition to a brand-first strategy without losing momentum.

STAGE 1 **Protect your pipeline. Start listening.**

- [ ] Keep demand gen running while identifying brand gaps.
- [ ] Audit content and channels for consistency and voice.
- [ ] Launch brand perception surveys and stakeholder interviews.
- [ ] Spot where product storytelling can connect to brand positioning.

STAGE 2 **Clarify your story. Align teams.**

- [ ] Develop a brand position with emotional resonance.
- [ ] Refine your narrative, messaging, and voice guidelines.
- [ ] Build alignment across sales, product, and leadership.
- [ ] Pilot brand-led content (executive point of view, customer stories).
- [ ] Show brand KPIs alongside demand: share of voice (SOV), branded search, Net Promoter Score (NPS).

STAGE 3 **Scale what works. Let brand lift more weight.**

- [ ] Roll out a unified brand system across web, content, ads, and outbound.
- [ ] Reframe feature campaigns inside your brand story.
- [ ] Launch a pilot brand campaign or thought leadership series.
- [ ] Track early indicators: conversion lift, sales cycle time, and direct traffic.

STAGE 4 **Embed brand everywhere. Expand your position.**

- [ ] Infuse brand into every touchpoint (sales decks, outbound, onboarding, product naming, investor materials, etc.).
- [ ] Equip GTM with tools that build trust and value.
- [ ] Ensure brand voice, visuals, and message show up consistently.
- [ ] Rally around a category point of view that positions your brand in front.

STAGE 5 **Multiply brand's impact. Own the narrative.**

- [ ] Extend brand-led programs into new segments, channels, and markets.
- [ ] Use customer insight to shape what you build and how you tell the story.
- [ ] Turn internal champions into external ambassadors.
- [ ] Let brand impact shape business strategy.

7 Red Flags That Undermine a Brand-First Strategy

1. Brand lives in marketing, not throughout the business.

If brand is treated as a "marketing thing" instead of a cross-functional growth driver, it won't stick.

WATCH FOR: Sales decks that ignore messaging. Product naming that breaks brand architecture. Business leaders who say, "Just make it look nice."

2. There's no shared definition of brand.

Leadership isn't aligned on what brand means or why it matters.

WATCH FOR: Fluffy asks for a "brand campaign." Conflicting narratives across teams.

3. No one owns adoption.

Brand is treated as a launch moment, not an ongoing shift.

WATCH FOR: No rollout plan. No GTM training. Zero presence in recruiting or onboarding.

4. Metrics don't support brand.

Brand gets judged (and cut) by demand-gen KPIs.

WATCH FOR: Dashboards without SOV, NPS, or branded search. Decisions based only on MQLs and cost per lead.

5. Product still dominates the story.

Brand becomes window dressing when every campaign starts with features.

WATCH FOR: Launch-first thinking. No category point of view. Content focused on specs instead of story.

6. Brand is underfunded and under-resourced.

The impact of brand is limited without the necessary resources.

WATCH FOR: No budget or headcount dedicated to brand. Strategy pushed back "until next quarter."

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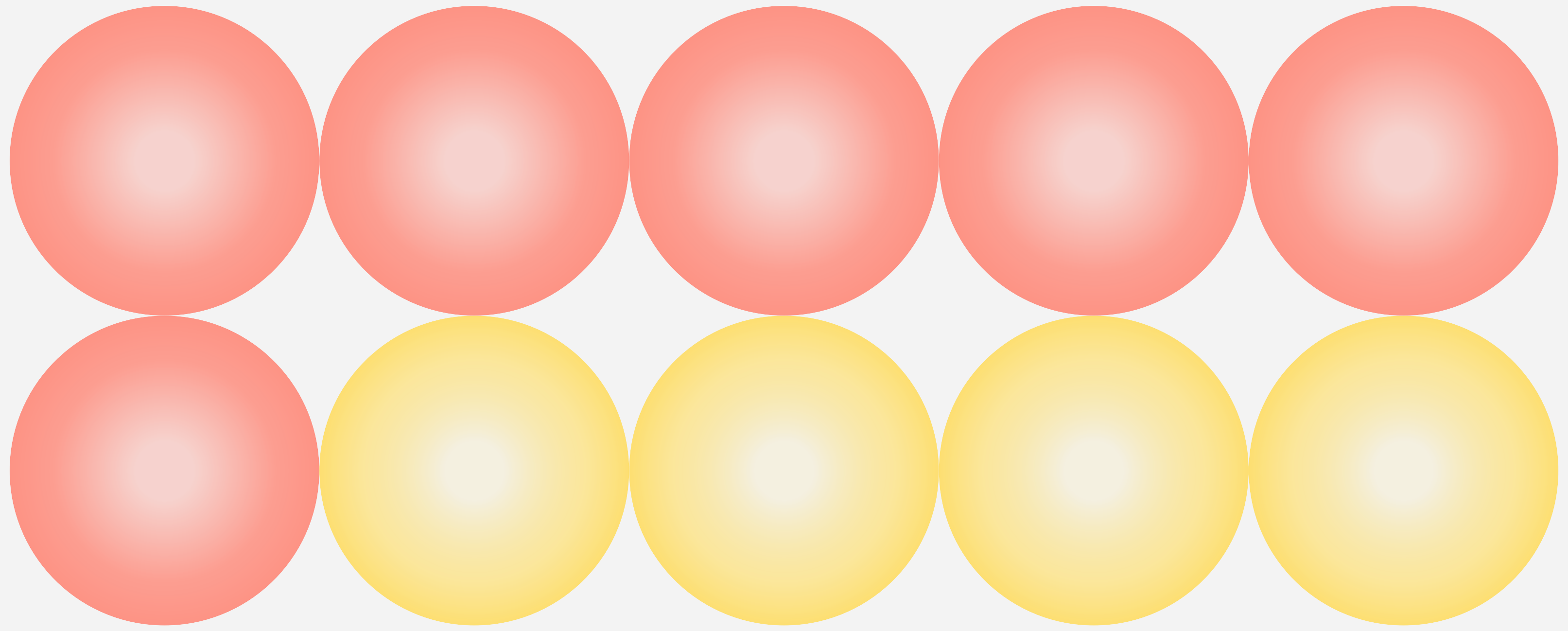
7. Brand and demand are disconnected.

A siloed brand team leads to friction and inefficiency.

WATCH FOR: Disjointed campaigns. Brand rewritten by demand teams. Missed opportunity to connect the dots.

Six in ten B2B marketers say that better brand creative increases engagement.



07

Claim your position in this moment and lead

We're in a moment that favors B2B tech marketers who don't just talk about differentiation but build it actively and intentionally from the inside out.

Breakthrough brands don't just describe what they do. **They stand for something.**

Pitch-perfect positioning defines the unique transformation you deliver, the audience you're built for, and the category you're shaping—or reshaping. Done right, it's a strong foundation for a smarter go-to-market strategy, a stronger pipeline, and tighter internal alignment.

WHAT IT LOOKS LIKE: Positioning frameworks. Differentiated messaging. Competitive audits. Clarity on your ideal customer profile and the market gap you're seeking to fill.

Some brands lead with volume. **The ones that win lead with voice.**

Magnetic brands don't just sound smart, they sound like themselves. Their voice is strategic and human. It makes a clear promise, builds trust, and shows up with confidence in its place in the market.

WHAT IT LOOKS LIKE: Brand narratives. Messaging systems. Copy guidelines. Content strategy with teeth and tone. Internal playbooks that unify teams around a shared story.

Design isn't just the finish, **it's part of the strategy.**

In crowded categories, distinctive design isn't just aesthetic, it's competitive. Visual systems should be flexible, intentional, and unmistakably yours. Brand consistency builds recognition, communicates value, and supports premium market positioning.

WHAT IT LOOKS LIKE: A brand built to connect, not just impress. An identity that bonds with customers across a seamless experience. Scalable design systems that grow with you, from campaign to homepage. Templates and guidelines that keep your team on-brand, without slowing them down.

High-performing content doesn't shout ideas, **it shapes thoughts.**

Market-leading brands publish brand-building content that closes the gap between attention and action. It's not about simply pushing thought leadership through the usual channels. It's about creating strategic content that educates, connects, and converts.

WHAT IT LOOKS LIKE: Content roadmaps. Editorial planning. Sales-aligned messaging. Cross-channel campaigns that drive visibility, engagement, and pipeline.

Today's strongest B2B brands aren't the loudest in the room, they're the clearest. They stand firmly in what makes them different. They lead with relevance. And they know that real brand power doesn't just get you noticed. **It gets you chosen.**

B2B organizations with 20% or more revenue growth place significantly higher value on their brand than their slower-growing peers.

Ø8

Brand is an advantage you can count on

AI has accelerated the pace. But it hasn't changed what buyers value. While product features can be easily copied, brand is your most lasting differentiator.

Brand earns trust, opens doors, supports revenue and pipeline growth, and builds loyalty that features alone can't.

The companies bold enough to lead with brand now will define the next era of B2B tech.

Block Club partners with B2B tech leaders to build brands that last.

Let's talk.

About Block Club

Block Club is the premier branding, strategy, and content agency for B2B tech. Our senior-level team of strategists and creatives work remotely with clients around the world to drive the value of their company and give them the competitive edge they need to grow. Visit blockclub.co to discover why brands like Plaid, Middesk, Alloy, Codat, Pigment, Culture Amp, and Airship trust Block Club.

Methodology

This report is based on a survey conducted by Block Club in June 2025, targeting senior marketing leaders at B2B SaaS and software companies. A total of 60 CMOs and VPs of marketing participated. Respondents were asked a series of open- and closed-ended questions exploring the impact of AI on product differentiation, emerging brand trends, and internal challenges to standing out in the market. Qualitative responses were analyzed for recurring themes and strategic insights. Quantitative results were aggregated to identify dominant patterns and outliers across the sample.