

B2B Marketing — Workbook

This workbook turns the course into a working demand-generation and pipeline plan for one real B2B offer. Each section mirrors a course module with hands-on exercises, fill-in worksheets, and checklists. Pick one product and one ICP and carry them through every section. You will finish with a defined ICP and buying committee, a demand-creation and capture plan, a lead-scoring model and nurture map, a marketing-sales SLA, and a funnel model with pipeline, CAC, and payback you can present to leadership.

Foundations: How B2B Buying Actually Works

Define the ICP, map the buying committee behind your deals, and size the market with TAM, SAM, and SOM so your later targets are grounded in real account counts.

Worksheet: Write Your Ideal Customer Profile (ICP)

Define the company you should sell to, as precise exclusion criteria, not a wish list. A good ICP tells your team which accounts to ignore. Name two current best customers that exemplify it.

Industry or vertical you win in

Employee-count band and revenue band

Geography you can sell and support

Technographics: platforms they run that you integrate with or replace

Buying triggers: funding, leadership change, audit, regulation, public pain signal

Negative criteria: traits that make a deal slow, cheap, or doomed

Two current best-fit customers that prove the profile

Worksheet: Map the Buying Committee by Role

For each committee role, name a likely title at your accounts and the one question that role must have answered before saying yes. Note which content asset answers it today (or the gap).

Champion: likely title, what makes them look good internally, the asset that helps them sell it up

Economic buyer: likely title, the payback or risk question they ask, the asset that answers it

Technical or security evaluator: likely title, the veto concern, the documentation that addresses it

End user: likely title, the daily pain, the proof that adoption is easy

Procurement or legal: what terms or compliance concerns appear late

Biggest content gap: the role you currently cannot answer, and the asset to build

Exercise: Size Your Market: TAM, SAM, SOM

Build the numbers bottom-up from account counts and price, not top-down from an analyst headline. Use the companion Funnel and Economics spreadsheet to compute; capture the inputs here.

- How many accounts match your ICP, per a firmographic data source, and what source did you use?
 - What is your average annual contract value, and so what is SAM (accounts times ACV)?
 - What realistic capture percentage can you win over what period, and so what is SOM?
 - Is your real constraint awareness (you reach few ICP accounts) or conversion (you reach many, win few)?
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Checklist: Foundations Readiness Check

- My ICP is specific enough to disqualify most of the market, not a vague wish list.
 - I have named all committee roles and the one question each needs answered.
 - I have identified at least one content gap tied to a specific committee role.
 - I sized SAM bottom-up from an account count times my real ACV.
 - My pipeline expectations match my SOM and win rate, not consumer-scale hopes.
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Demand Generation: Creating Demand and Capturing It

Split your program into demand creation and demand capture, map content to buyer awareness stages, decide what to gate, and choose channels on cost per opportunity rather than cost per lead.

Worksheet: Split Your Budget: Creation vs Capture

Label every current and planned tactic as demand creation or demand capture, then decide a deliberate budget split and write down why. The point is to expose an accidental drift to all-capture. Demand-capture tactics today (search ads, review sites, capture pages) and their spend

Demand-creation tactics today (content, webinars, podcasts, social) and their spend

Current split as a percentage, creation vs capture

Target split and the reasoning (recall the 95-5 rule: most buyers are not in-market now)

The creation line you will defend when asked why it has no leads this week

Exercise: Build the Content-to-Awareness Map

Map content to the buyer's awareness stage, not your feature list. For each stage, name one asset you have and one gap to fill, and decide gating per asset against reach lost versus form-fills gained.

- Top of funnel (problem-aware): which guide or research piece do you have, and what is missing?

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- Middle of funnel (solution-aware): which webinar, comparison, or template serves them?
 - Bottom of funnel (product-aware): which case study, ROI calculator, or pricing page closes the gap?
 - Which single asset truly deserves a gate, and which currently-gated asset should be ungated to gain reach?
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Worksheet: Channel Selection by Cost per Opportunity

For each channel you use or consider, capture its role and economics. Judge on cost per opportunity and pipeline, not cost per lead. The companion spreadsheet does the math; record inputs and the decision here. Channel and its job (creation or capture)

Why the ICP committee is reachable there (targeting fit)

Spend, opportunities sourced, and resulting cost per opportunity

Pipeline dollars sourced by this channel

Decision: scale, hold, or cut, and the reason

Checklist: Demand-Generation Readiness Check

- Every tactic is labeled creation or capture before it is funded.
- My content is mapped to buyer awareness stages with gaps identified.
- Most top-of-funnel content is ungated; gates are reserved for high-intent assets.
- I measure channels on cost per opportunity and pipeline, not cost per lead.
- My channel mix includes creation to fill future pipeline, not capture alone.

Lead Management: Scoring, Nurture, and the Sales Handoff

Build a two-dimension lead-scoring model, design nurture for a long multi-stakeholder cycle, and define the lead stages and marketing-sales SLA that make the handoff work and feed scoring back.

Worksheet: Build Your Lead-Scoring Model

Score fit and behavior as two independent dimensions so neither disguises the other. Assign points, add negative scoring for disqualifiers, and set the MQL threshold. Plan to recalibrate against real outcomes next quarter.

Fit attributes and points (title, company size, industry, geography)

Behavior actions and points (pricing view, demo request, webinar, repeat visits)

Negative scoring (free-email domain, student, competitor, out-of-ICP)

Score decay rule so stale engagement loses value

MQL threshold value and how you will validate it against opportunities created

Exercise: Design a Multi-Touch Nurture Track

Sketch a nurture for one persona and stage that paces for a long cycle and triggers from behavior. Remember nurture earns the next touch by being useful, not by demanding a meeting.

- Which persona and stage is this track for, and what is the cadence over how many weeks or months?

- What are the first three touches, each with a useful asset and a low-pressure next step?

- What behavior trigger starts a faster bottom-of-funnel track (for example, a pricing-page view)?

- What is your re-engagement and recycling plan for leads that go quiet or are disqualified on timing?

Worksheet: Define Lifecycle Stages and the Marketing-Sales SLA

Write the lead stages with owners and entry criteria, then a two-way SLA with numbers. Speed matters: fast first contact dramatically raises qualification odds. Build the closed-loop feedback into the model. Stage definitions and owners: inquiry, MQL, SAL, SQL, opportunity, closed

Marketing commitment: monthly MQL quantity and the fit criteria they must meet

Sales commitment: maximum response time and follow-up cadence per MQL

Feedback loop: how sales marks each MQL accepted, rejected (with reason), or recycled

Review cadence: when the two teams meet to review MQL quality and disputed leads

Checklist: Lead-Management Readiness Check

- My scoring separates fit from behavior and includes negative scoring.
- I will recalibrate the MQL threshold against which leads became opportunities.
- Nurture is segmented by persona and paced for a long cycle, not a daily countdown.
- Disqualified-on-timing leads recycle back to marketing rather than dying.
- An SLA defines MQL volume, response time, and a closed-loop rejection-reason feedback.

Pipeline and Measurement: Proving Marketing's Value

Model the funnel from revenue target back to lead volume, choose multi-touch attribution and report sourced and influenced pipeline, and compute CAC and payback for a report finance will fund.

Exercise: Reverse-Engineer the Funnel

Work backward from your pipeline target through stage conversion rates to the required lead volume, then test affordability against cost per lead. Use the companion spreadsheet to compute and find the bottleneck stage.

- What is your pipeline target and average deal size, so how many closed deals are needed?

 - What are your stage conversion rates (close, SQL-to-opp, MQL-to-SQL, lead-to-MQL), and so how many leads are required?

 - At your channels' cost per lead, is that lead volume affordable, and from which channels?

 - Which stage is the bottleneck, and does the fix need more volume or better quality and handoff?
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Worksheet: Choose Attribution and Report Pipeline

Pick a multi-touch model and define sourced versus influenced pipeline, then reconcile tagging with sales. Document the model's known bias and use it to compare channels, not to claim absolute truth. Attribution model chosen (linear, W-shaped, or time-decay) and why it fits your journey

Definition of marketing-sourced pipeline for your team

Definition of marketing-influenced pipeline for your team

How an opportunity is tagged sourced versus self-generated (agreed with sales)

Self-reported attribution method (how-did-you-hear field) to catch dark-social touches

Worksheet: Compute CAC, LTV:CAC, and Payback

Calculate the unit economics finance cares about. Use the companion spreadsheet for the math and record results and decisions here. Aim for roughly 3:1 LTV:CAC and payback under 12 to 18 months for B2B SaaS. Total sales and marketing spend in the period and new customers won, so CAC

Average revenue per customer, gross margin, and lifespan, so LTV

LTV:CAC ratio and whether it clears roughly 3:1

CAC payback in months and whether it clears your target

Marketing's share of CAC and which channel improves these ratios most

Checklist: Measurement Readiness Check

- I can derive required lead volume from a revenue target and my conversion rates.
- I have identified the bottleneck stage before spending to grow the funnel.
- I use a multi-touch attribution model, not last-touch, and report sourced and influenced pipeline.
- I compute CAC, LTV:CAC, and payback, not just lead counts.
- My report leads with pipeline and economics and pushes activity metrics to the bottom.

Your Action Plan

1. Write a precise ICP with negative criteria and confirm it against two best-fit customers.
2. Map the buying committee by role and list the one content asset each role needs (and the gaps).
3. Size SAM and SOM bottom-up from ICP account count times ACV, and set targets from SOM.
4. Label every tactic creation or capture and set a deliberate budget split that protects creation.
5. Map content to awareness stages, ungate top-of-funnel assets, and gate only high-intent ones.
6. Pick channels by cost per opportunity, instrument tagging, and cut what sources no pipeline.
7. Build a fit-plus-behavior lead-scoring model with negative scoring and an MQL threshold.
8. Design persona-segmented nurture paced for the cycle, with recycling and re-engagement tracks.
9. Define lifecycle stages and sign a two-way marketing-sales SLA with a rejection-reason

feedback loop.

10. Build the funnel-and-economics model, then report sourced pipeline, CAC, and payback to leadership.

