

# Demand Generation — Workbook

This workbook turns the course into the real artifacts of a working demand-gen program. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you apply to your own business. Pick one product and one realistic segment you sell to, and carry them through every section. You will finish with a create-versus-capture budget split, a backwards pipeline model, a full-funnel content and channel plan, a written MQL definition and marketing-sales SLA, an intent and account-prioritization approach, a pipeline-based scorecard, and a concrete 90-day launch plan.

## What Demand Generation Actually Is

Get the foundations right — split create versus capture, then size the whole program backwards from a revenue target before spending a dollar.

### Exercise: Sort Your Programs Into Create vs Capture

List the marketing programs you run today (or plan to) and force each into one bucket. This exposes whether you are over-invested in harvesting existing demand and starving the creation that feeds future pipeline.

- List every current or planned program (paid search, SEO, LinkedIn, webinars, events, content syndication, podcast, review sites, etc.).

- Label each as demand CREATION (makes buyers want you before they shop) or demand CAPTURE (harvests buyers who already have intent).

- Apply the gut check: if you switched it off tomorrow, would demand still exist or eventually dry up?

- Tally the rough budget split today, then state your target split (e.g. lean 60-40 toward creation) and the gap you need to close.

### Worksheet: Backwards Pipeline Model

Do not plan forwards from leads. Start from the revenue target and divide by each historical conversion rate to find the volume you need at every stage. Use your real numbers; if you lack history, use conservative estimates and mark them to verify.

New revenue target for the period (\$)

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Average deal size / ACV (\$)

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Closed-won deals needed (target ÷ ACV)

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Opportunity-to-win win rate (%) and opportunities needed

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MQL-to-opportunity rate (%) and MQLs needed

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Contact-to-MQL rate (%) and engaged contacts needed

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Pipeline coverage multiple you will target (e.g. 3x-4x = inverse of win rate + margin) and the dollar pipeline that implies

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Reality check: can your channels realistically produce these numbers, and which conversion step is the weakest link to fix?

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### Checklist: Foundations Gut Check

- I can state, in one sentence each, how demand gen differs from lead gen and from brand marketing.
- I have an explicit, deliberate budget split between demand creation and demand capture — not an accidental one.
- My program is sized backwards from a revenue target, so I know exactly how many opportunities and MQLs I need.
- I have set a pipeline-coverage target (a multiple of the goal) and will monitor it weekly as an early warning.
- I am funding the ~95 percent of buyers who are out-of-market today, not only the small slice searching right now.

## Building the Content and Channel Engine

Build the machine — buyer-stage content, a deliberate owned-paid-earned channel mix, the right offers, and the nurture that warms contacts until sales-ready.

### Worksheet: Map Content to Buyer Stages

For your chosen product, plan the content engine so every asset has a stage, a job, and an explicit next step. Note what you already have versus what you must create, and which hero asset can feed the spokes. Top-of-funnel (awareness) assets and the question each answers — keep these ungated

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Middle-of-funnel (consideration) assets — webinars, guides, comparisons, case studies, ROI calculator

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Bottom-of-funnel (decision) assets — demo, pricing page, security/integration docs, customer proof, free trial

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The single explicit NEXT STEP each asset points to (so the journey has no dead ends)

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Your one ambitious HERO asset (original research / definitive guide / expert webinar) and the spokes it will feed

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Have vs need: which assets exist today and which are gaps to produce this quarter

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### Exercise: Choose Your Channels Deliberately

Resist running eight channels at once. Use the owned-paid-earned lens and your unit economics to pick the two or three you will actually prove out first.

- List candidate channels and tag each as owned, paid, or earned, and as creation, capture, or both.
- For each, note where your buyers genuinely pay attention and whether the channel reaches your ICP.
- Set a small test budget per channel (e.g. a few thousand dollars over 2-4 weeks) and the cost-per-lead /

cost-per-opportunity bar it must beat.

- Pick the 2-3 channels to commit to first, and list the others as later re-tests so you stay focused, not spread thin.

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### Worksheet: Design Offers, Gating, and Nurture

Plan the conversion mechanics. Match offer strength to stage, decide what to gate, and sketch the nurture and lead-scoring logic that turns captured contacts into MQLs.

Top-of-funnel offer (low-friction, value-first — what they get for just attention)

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Mid/bottom offers as intent rises (webinar, gated report, free trial, demo/consultation)

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Gating decisions: what stays ungated (reach/SEO) vs what is worth a form (high-value assets)

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Form fields per offer and whether you will use progressive profiling

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Nurture sequence outline: the staged messages that educate, handle objections, and raise intent

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Lead-scoring sketch: fit signals (industry, size, title) + intent signals (pricing visit, demo page, repeat visits) and the MQL threshold

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### Checklist: Engine Readiness Check

- Every content asset is mapped to a stage and points to an explicit next step — no orphan blog posts.
- Top-of-funnel content is ungated for reach; only high-value assets are gated behind a form.
- I am committing to 2-3 channels chosen by audience fit and economics, not chasing trending tactics.
- A behavior-triggered nurture exists to warm the roughly half of leads who are not yet ready to buy.
- Lead scoring combines fit and intent, was built with sales, and will be tuned against what actually converts.

## Aligning With Sales and Defining the Funnel

Make demand gen a revenue function — agree shared definitions, write an SLA with real commitments, and use intent to prioritize in-market good-fit accounts.

### Worksheet: Write the Shared Funnel Definitions

Fill this in WITH sales, not for them. Vague definitions are the number-one cause of dropped leads. Make each one concrete enough that two people would label the same lead identically.

MQL definition: the exact fit-plus-intent criteria for handing a lead to sales (written as concrete rules, not a vibe)

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SAL definition: what makes sales accept and own the lead

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SQL / Opportunity definition: the budget/authority/need/timing bar for a deal to enter pipeline

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Disqualified reasons: explicit rejection categories fed back to marketing (wrong title, no budget, competitor, student)

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Recycle rule: how good-fit-but-not-ready leads are returned to nurture instead of discarded

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Account-level (MQA) signals: if you sell to a 6-10 person buying group, what aggregate account engagement counts

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### Exercise: Draft the Marketing-Sales SLA

Turn alignment into a short contract of mutual commitments with numbers and timeframes. This becomes your operating agreement and your accountability mechanism.

- Marketing commitments: number and quality of MQLs/MQAs per period, with the enrichment/account intel sales needs.
  - Sales follow-up speed: the first-contact deadline (speed-to-lead — minutes beats hours by a wide margin) and how routing/alerts will enforce it.
  - Sales follow-up persistence: minimum attempts across channels before a lead can be marked dead.
  - The closed feedback loop and review cadence: sales logs a disposition on every lead, and both teams inspect MQL-to-opportunity conversion on a recurring schedule.
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### Worksheet: Intent Sources and Account Prioritization

Plan how you will spot in-market accounts and act on the signal — at the account level, layered on top of fit, without being creepy.

First-party intent sources you have (web analytics, reverse-IP/pixel, demo and pricing page visits, email engagement)

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Third-party intent sources you could add (Bombora Company Surge, G2 / TrustRadius buyer intent, 6sense / Demandbase / ZoomInfo)

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The action a topic surge or high-intent signal triggers (prioritize ads, alert the rep, add to nurture, personalize the site)

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The fit gate: how you confirm an account matches your ICP before investing (so intent prioritizes good-fit, never replaces fit)

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The not-creepy rule: how you increase relevance/coverage for the account without claiming to know more about a person than you should

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### Checklist: Alignment & Handoff Check

- Marketing and sales agreed the MQL/MQA, SAL, and opportunity definitions in writing — concrete, not a vibe.
- An SLA exists with mutual commitments: marketing volume/quality and sales follow-up speed and persistence.
- Leads are routed and alerted fast enough to hit a minutes-not-hours first-touch on hot MQLs.
- Sales logs a disposition (accepted / disqualified with reason / recycled) on every lead, and the data flows back to tune targeting.
- Intent is used only to prioritize accounts that already fit the ICP — never to justify chasing poor-fit accounts.

## Programs, Measurement, and Scaling

Put it in motion — run paid and event programs that produce pipeline, measure on the numbers that matter, and ship a 90-day plan you can launch and iterate.

### Exercise: Plan One Paid Program and One Event

Design two concrete programs end to end so they generate pipeline, not just activity. Treat the webinar/event as a campaign with a pipeline target and a follow-up plan agreed with sales up front.

- Paid program: pick the channel (e.g. paid search for capture or LinkedIn for creation+capture), the audience/keywords, the dedicated landing page, and the cost-per-opportunity bar.

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- Webinar plan: the topic, the 2-3 week promotion across email/paid/partners, and how the on-demand recording will keep generating leads for months.

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- Event plan: the pre-set sourced + influenced pipeline target and the concrete follow-up motion agreed with sales BEFORE you commit budget.

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- For each program, state the single metric you will judge it on (pipeline / cost per opportunity), not the vanity metric you will ignore.

### Worksheet: Build Your Demand-Gen Scorecard

Replace vanity metrics with pipeline and efficiency metrics. Record a baseline first so you can prove lift, and add leading indicators that let you defend the creation budget honestly.

Pipeline created (\$ of qualified opportunities) — the headline number

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Cost per opportunity (CPO = total spend ÷ opportunities) — replaces cost per lead

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Stage conversion rates: MQL!SAL, SAL!opportunity, opportunity!won (to find the leak)

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Pipeline coverage (open qualified pipeline as a multiple of goal, e.g. 3x-4x) — early-warning gauge

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CAC payback (months of gross margin to recover acquisition cost; healthy SaaS often "d ~12 months)

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Marketing-sourced and marketing-influenced revenue (the scoreboard)

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Creation leading indicators (branded search growth, direct/organic traffic, share of voice, untraceable inbound demo requests)

### Exercise: Write Your 90-Day Launch Plan

Sequence everything into a quarter you can actually execute. The first quarter's goal is a working engine and real conversion data, not a giant pipeline number.

- Weeks 1-2: confirm ICP and funnel stages, agree the MQL definition and SLA with sales, set revenue and coverage targets via the backwards math.

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- Weeks 2-6: stand up tracking, automation, lead scoring, landing pages, and clean source tags; build one hero asset + spokes and the nurture flows.

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- Weeks 4-8: launch 2-3 channels with small test budgets, each held to a cost-per-opportunity bar, plus one webinar.

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- Weeks 6-12: run a weekly review by stage and channel — cut what underperforms, double down on what works, tune scoring — then rebuild the next plan on real numbers.
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### Checklist: Launch & Pitfall-Avoidance Check

- Clean source tracking is on every link and campaign from day one, so I can tell what actually worked.
- I am launching 2-3 channels with test budgets, not eight channels too thin to reach significance.
- I report pipeline, cost per opportunity, and sourced revenue as the headline — lead volume is only a leading indicator.
- A protected creation budget is judged on leading indicators, not defunded after one quarter for failing a last-click test.
- Every event and webinar has a pre-agreed pipeline target and a sales follow-up plan before any budget is spent.
- I will run the loop — launch, measure by stage, cut, double down — every quarter so the engine compounds.

### Your Action Plan

1. Sort every program into demand creation vs demand capture, tally the current budget split, and set a deliberate target split.
2. Build a backwards pipeline model: from the revenue target, work through win rate, MQL-to-opportunity, and contact-to-MQL to find required volumes, and set a 3x-4x coverage target.
3. Map your content to buyer stages, keep top-of-funnel ungated, and commit to one ambitious hero asset that feeds the spokes.
4. Pick 2-3 channels by audience fit and economics, run small paid tests, and hold each to a cost-per-opportunity bar before scaling.
5. Design offers matched to each stage, gate only high-value assets, and build a behavior-triggered nurture plus fit-and-intent lead scoring.
6. Sit with sales and write the shared funnel definitions (MQL/MQA, SAL, opportunity, disqualified, recycle) so two people label a lead identically.
7. Write a marketing-sales SLA with marketing volume/quality commitments and sales follow-up speed and persistence, plus a closed feedback loop and review cadence.
8. Add intent data (first-party plus a source like Bombora, G2, or 6sense) to prioritize in-market accounts that already fit the ICP.
9. Stand up a pipeline-based scorecard with a baseline, tracking pipeline created, CPO, stage conversions, coverage, CAC payback, and sourced/influenced revenue.
10. Execute a 90-day plan: stand up infrastructure, launch 2-3 channels plus a webinar, review weekly by stage and channel, cut and double down, then rebuild the next plan on real numbers.











