A MODERN B2B MARKETING PLAYBOOK

BUILD THE ENGINE.
OWN THE NUMBER.

Turning brand, demand, and data into predictable pipeline.

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The playbook at a glance.

Five parts, from the foundation to a machine that runs every week.

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HOW TO USE THIS GUIDE

This is the plan I bring into a company on day one. It's written to be practical, not theoretical.

Each page shows what we do in the main area. The side panel covers why it matters, how it works, what to do if your situation is different, and where plans usually break.

WHAT IF WE CAN'T DO IT ALL?

Not every company needs every page on day one. Page 27 shows what to build first based on your stage and budget.

HEALTHCARE LENS

Healthcare examples appear throughout because that's where I've spent my career. The model works for any B2B company with a considered sale and a buying committee.

01

PART I

Why the Playbook Changed

Five years ago, marketing's job was to fill the funnel. Today, marketing owns a number.

IN THIS SECTION

04 The Shift

05 How I Operate

Marketing's job changed. The playbook should too.

The companies winning today run marketing as a revenue function, not a service desk for Sales.

THEN	NOW
Generate leads and hand them to Sales	**Own a pipeline number alongside Sales**
Market to one buyer	**Engage a buying group of 6 to 10 people, many of whom never fill out a form**
Publish more content	**Get the right content in front of the right accounts**
Report clicks, downloads, and MQLs	**Report pipeline, win rate, and revenue impact**
AI as a novelty	**AI as the way a lean team works like a bigger one**

WHAT DIDN'T CHANGE

Buyers still choose companies they trust. Brand is still the foundation. It just has to be connected to the number now.

Five principles behind every plan I build.

01

Own the number.

Marketing commits to a pipeline target and reports against it every month, in the same meeting as Sales.

02

Depth over scale.

A focused list of the right accounts beats a big list of the wrong ones.

03

Follow the data.

Test in parallel, double down on what's working, and cut what isn't, even when it was our idea.

04

Distribution beats creation.

A great asset nobody sees is a cost, not an investment.

05

Build the team that outgrows me.

Hire people who can do each job better than I can, then get out of the way.

WHY PRINCIPLES FIRST?

Tactics change every year. Channels rise and fall. Principles are what keep a marketing team making good decisions when the plan meets reality.

HOW THEY HELP

They make trade-offs easier. When two good ideas compete for the same budget, these principles decide which one wins.

02

PART II

Build the Foundation

Positioning before programs. Every dollar spent on demand works harder when the foundation is right.

IN THIS SECTION

07 ICP & Buying Group

08 Brand Story & Positioning

09 The Customer Journey

10 The Sales-Cycle Journey Map

Know exactly who we're for, and who decides.

We don't sell to companies. We sell to the people inside them, and each one needs a different reason to say yes.

IDEAL CUSTOMER PROFILE

- **Firmographics:** industry segment, size, geography, business model
- **Fit signals:** technology in place, growth stage, regulatory pressure
- **Buying triggers:** new leadership, funding, contract renewals, performance gaps, policy changes
- **Disqualifiers:** who we should not spend time on

BUYING GROUP MAP

WHY IT MATTERS

Most B2B deals stall because one person in the buying group was never convinced. Mapping roles early tells us what content, proof, and outreach each person needs.

HEALTHCARE LENS

Health plan example. Economic buyer: VP of Quality or Stars. Champion: Director of Member Engagement. Influencers: care management, IT, analytics. Blocker: procurement and the "we can build this ourselves" instinct.

Buying often follows the plan-year and budget calendar. Knowing when budgets are set tells us when to be in front of them.

A story the market remembers, told the right way to each buyer.

Brand is what makes every other program cheaper. Buyers shortlist the companies they already trust.

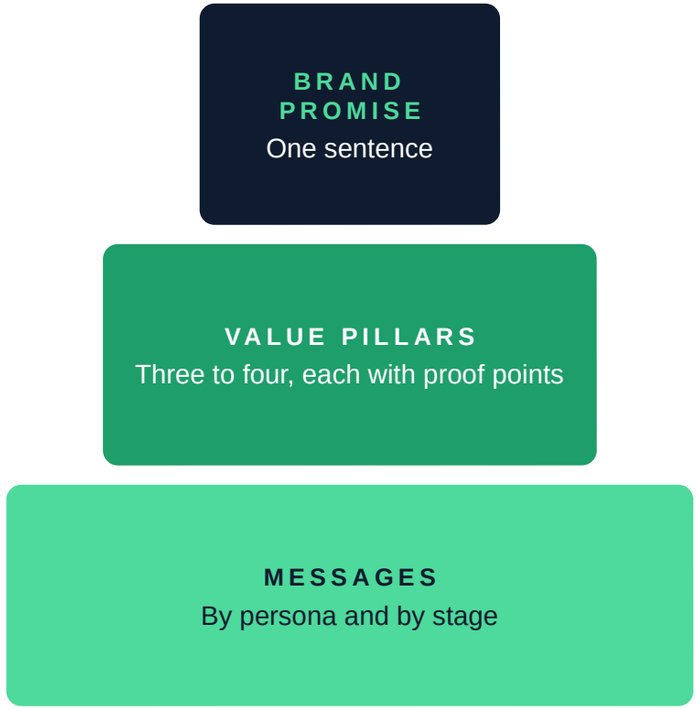
THE BRAND STORY

- A clear point of view on what's broken in the market and how it should work
- The customer as the hero, the company as the guide
- One brand promise, stated in a single sentence

COMPETITIVE DIFFERENTIATION

- Map direct competitors, adjacent alternatives, and "do nothing"
- Define why us, why now, and why not the status quo
- Back every claim with proof: data, outcomes, customer voices

MESSAGING ARCHITECTURE



WHY IT MATTERS

A strong narrative shortens sales cycles, lifts win rates, and builds company value. Investors and acquirers buy the story as much as the numbers.

WHAT IF WE ALREADY HAVE MESSAGING?

Test it. Run it past five customers and five lost deals. If they can't repeat it back or it doesn't match why they bought, it's time to refine.

WHERE PLANS BREAK

Messaging written by committee. Every stakeholder adds a word until the promise says nothing. One owner, clear input, fast decisions.

Experience first. Every touchpoint should invite the next step.

The journey doesn't end at the signature. Retention and advocacy are part of the plan.

01

Spark

Establish credibility and generate interest with high-quality content and targeted outreach.

TOUCHPOINTS

Website, thought leadership, social, events, podcasts

02

Engage

Be helpful and build relationships, giving buyers what they need to go further.

TOUCHPOINTS

Educational content, product tours, customer stories, in-person events

03

Onboard

Give new customers a high-touch welcome and the right tools at the right time.

TOUCHPOINTS

Welcome kit, onboarding sessions, training, implementation roadmap

04

Sustain

Build loyalty by listening, anticipating needs, and going above and beyond.

TOUCHPOINTS

User summits, customer community, success reviews, advocacy programs

THE SAME FRAMEWORK APPLIES TO EMPLOYEES. A team that believes in the brand becomes its best channel.

What each stage needs, and the content that delivers it.

Content without a purpose is a distraction. Every asset maps to a stage and a goal.

	Marketing Leads	Discovery	Follow-up	Proposal	Onboarding	Retention
GOAL	Build awareness and drive engaged accounts	Capture the voice of the customer and qualify fit	Deepen the conversation and build the case	Deliver a personalized partnership proposal	Deliver excellence from day one	Turn customers into advocates
NEEDS	Direct, digital, and event reach	Clear intro: who we are, how we help	Education and tailored solutions	Business case and terms	Team introductions and expectations	Support model and account ownership
CONTENT	**Website, podcast, video, social, events**	**Discovery guide, one-pager, custom landing page**	**Sales deck, case study, ROI framework**	**Proposal, business case, executive summary**	**Welcome kit, onboarding deck, roadmap**	**Success reviews, video tutorials, community**

Maps vary by audience. This version is built for sales leadership. A customer-facing version uses the buyer's language, not ours.

03

PART III

Build the Engine

Commit to the number. Focus on the right accounts. Build demand that compounds.

IN THIS SECTION

12 Own the Number

13 Work Backward From the Number

14 Account-Based Marketing

15 ABM in Action

16 The Demand Engine: Hub & Spoke

17 Hub & Spoke in Action

18 Earned Visibility & Executive Voice

19 AI in the Engine

One number marketing is accountable for. Everything else supports it.

Marketing reports sourced pipeline first, because it's the number Sales and Finance trust.

PRIMARY

Marketing-sourced pipeline

Qualified opportunities where marketing created the first meaningful engagement. Set as a share of total pipeline, agreed with Sales and Finance.

SUPPORTING

Marketing-influenced pipeline

Opportunities where target accounts engaged with marketing before or during the deal.

SUPPORTING

Win rate and velocity on engaged accounts

Proof that marketing makes deals better, not just more frequent.

SUPPORTING

Expansion pipeline

Upsell and cross-sell opportunities supported by customer marketing.

ATTRIBUTION RULES WE AGREE ON UP FRONT

- Definitions of "sourced" and "influenced" are written down and signed off by Sales
- CRM attribution is paired with self-reported attribution ("How did you hear about us?") on every demo request and in discovery calls
- We report the same numbers in the same meeting as Sales

WHY SOURCED FIRST?

Influenced pipeline is real, but it's easy to inflate. Leading with sourced pipeline builds credibility with the CRO and CFO. Influenced tells the fuller story once trust is earned.

WHAT ABOUT THE DARK FUNNEL?

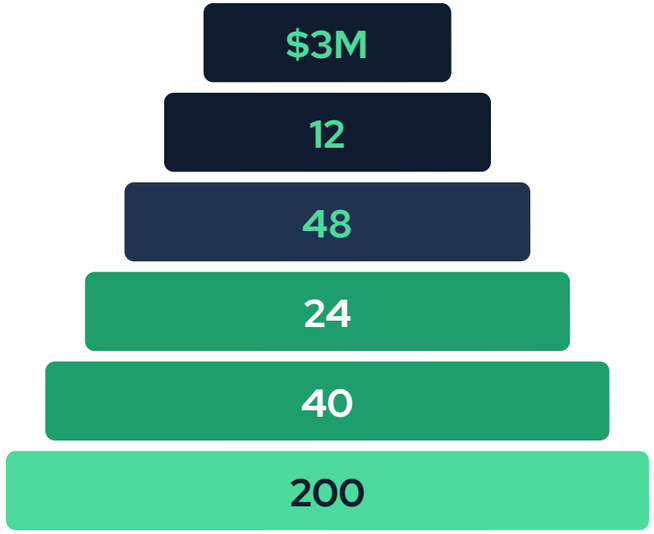
Much of the buying journey happens where we can't track it: peer conversations, communities, podcasts, and AI tools. Self-reported attribution captures what software misses. When buyers say "a colleague told me" or "I heard your CEO on a podcast," that's data.

The plan starts with the revenue target, not the content calendar.

When marketing agrees to a number with Sales and Finance, every budget decision gets easier.

THE MATH, MEASURED IN ACCOUNTS

ILLUSTRATIVE



New revenue target
The number we commit to

Wins needed
$250K average deal size

Opportunities
25% win rate | $12M pipeline, 4x coverage

Marketing-sourced opportunities
50% sourced share

Sales-accepted accounts
60% convert to opportunity

Engaged target accounts
20% become qualified

PIPELINE TIMING

Q1	Q2	Q3	Q4
Judged on engagement and pipeline created	Judged on engagement and pipeline created	Engagement, pipeline, and closed revenue	Engagement, pipeline, and closed revenue

With a 9 to 12 month sales cycle, pipeline built this year closes next year.

WHY WORK BACKWARD?

It turns marketing from a cost center into a plan with math behind it. It also exposes gaps early. If we need 200 engaged accounts and the total market is 150, we know before we spend a dollar that the strategy has to change.

WHAT IF WE DON'T HAVE HISTORICAL DATA?

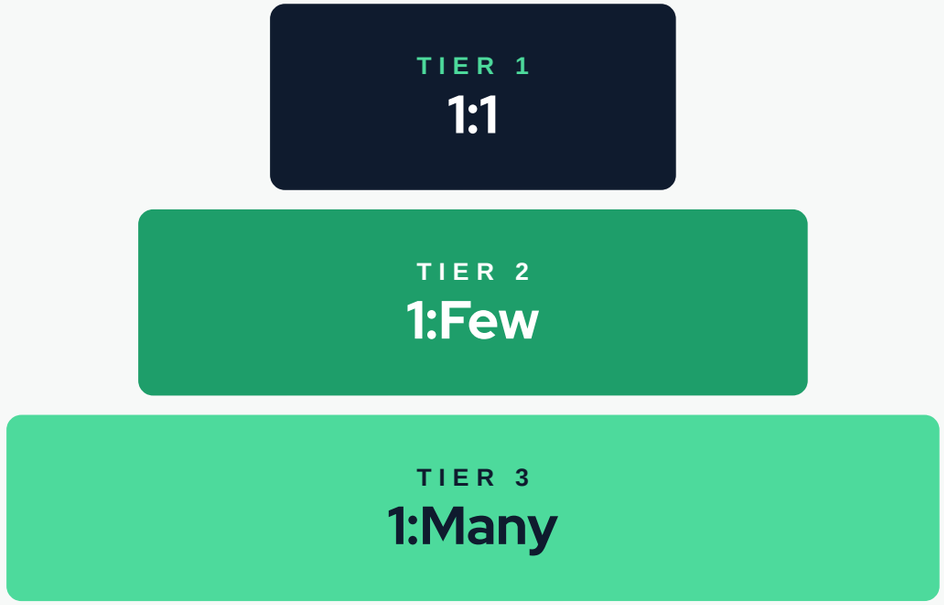
Use industry benchmarks for the first quarter, label them as assumptions, and replace them as soon as real numbers come in. A rough plan you update beats a perfect plan you never start.

HOW WE RUN IT

Agree on sourced and influenced targets with Sales and Finance. Build channel budgets from conversion rates, not last year's spend. Replace assumptions with real conversion data every month.

Focus the whole engine on the accounts that matter most.

Growth runs on a short list of accounts. ABM makes sure marketing and sales are working the same list.



10 to 20 strategic accounts

Deep account research, executive outreach, custom content, dinners and private events, direct mail. Coordinated weekly with the account owner.

50 to 100 accounts

Grouped by segment, use case, or trigger. Industry-specific campaigns, targeted webinars, and personalized landing pages.

Broader ICP

Programmatic ads, intent-triggered nurture, and always-on content. Accounts move up a tier when they show buying signals.

- **Every tier has a named sales owner**
- **Intent data moves accounts between tiers**
- **Partners become a warm path in**
- **Measured at the account level**

WHY ABM?

Five people from one target account reading our content is a stronger signal than fifty random downloads.

SMALL TEAM?

Start with Tier 1 only. Pick 15 accounts with Sales, build one play, run it for 90 days. ABM starts with focus, not software.

WHERE PLANS BREAK

Marketing picks the list alone. If Sales didn't help choose the accounts, they won't work them.

What a coordinated account play looks like over 90 days.

Marketing and sales move together, one account at a time.

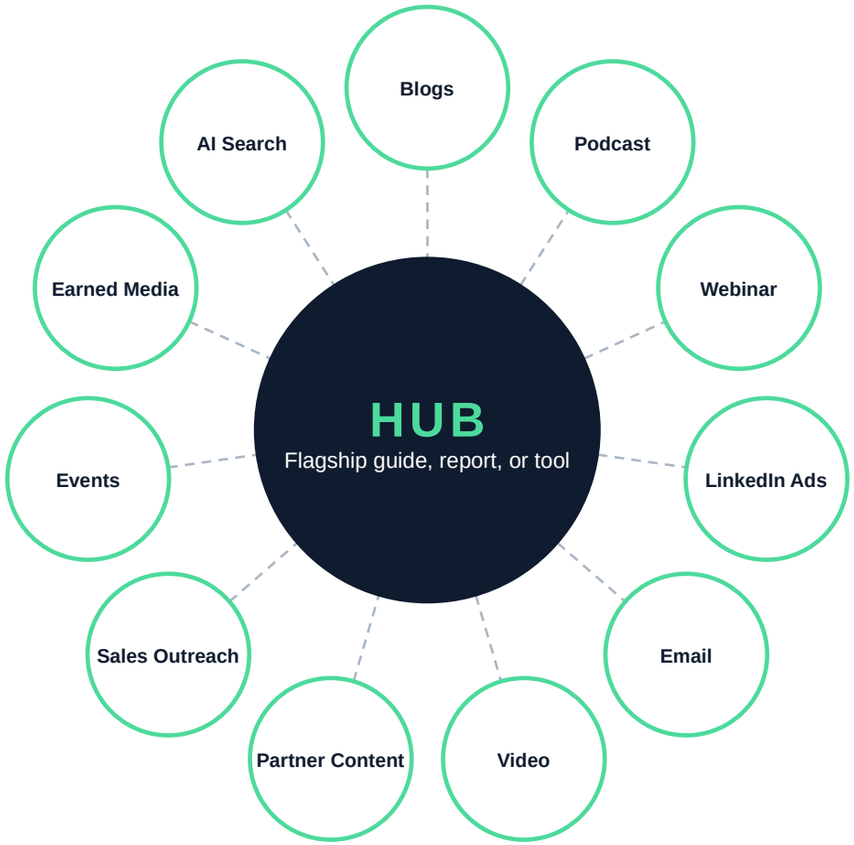
ILLUSTRATIVE EXAMPLE *A Tier 1 play for a regional health plan with 400K members*

	WEEKS 1 TO 3 Research & Prepare	WEEKS 4 TO 8 Engage	WEEKS 9 TO 12 Convert
MARKETING	Account brief (priorities, leadership, performance gaps, recent news), buying group map, tailored one-pager.	Targeted ads to the buying group, personalized content hub, invitation to an executive roundtable.	Custom ROI analysis, private dinner or on-site workshop at a key industry event.
SALES	Confirm contacts, identify warm paths through existing relationships and partners.	Executive outreach referencing the account brief, share a relevant case study.	Discovery meeting, business case, proposal.

SUCCESS MEASURES Buying group members engaged, meetings held, opportunity created, deal velocity.

One big idea per quarter, distributed everywhere our buyers are.

The hub drives conversions. The spokes drive traffic to the hub.



01 **One flagship hub per quarter** built around a real buyer problem.

02 **Spokes across every channel:** owned, earned, paid, partner, and sales-led.

03 **Create demand and capture it.** Thought leadership, podcasts, and events create interest. Search, review sites, and retargeting capture it.

04 **Always-on for the core story,** campaigns for launches and key moments.

05 **Sales and executives distribute directly** to their most important relationships.

WHAT IS HUB AND SPOKE?

The hub is one substantial piece of content, like a buyer's guide or research report. The spokes are smaller pieces pulled from it, each pointing back to the hub. It turns one big investment into three months of consistent, connected content.

WHY IT WORKS

Buyers need to hear a message many times before it sticks. Hub and spoke gives the market one clear idea, repeated in many formats, instead of scattered one-off posts.

WHAT IF WE HAVE NO PAID BUDGET?

Lean on the spokes that cost time, not money: sales and executive sharing, partner co-promotion, podcasts, and speaking. Distribution through the right relationships often outperforms paid reach.

How one hub becomes a full quarter of connected demand.

Every phase adds new spokes and builds toward an in-person moment.

ILLUSTRATIVE CAMPAIGN **Hub:** *The Build vs. Buy Guide, a strategic framework for the decision your buyers are stuck on*

PHASE 1 | MONTH 1
Launch

- Publish the hub
- Email and social launch
- Content syndication
- Blog and podcast #1 introduce the core idea
- LinkedIn ads to Tier 2 and Tier 3 accounts

PHASE 2 | MONTH 2
Amplify

- Webinar with a customer or partner
- Blog and podcast #2
- Infographic and short video
- Sales shares the guide with target accounts
- Media pitch on the guide's key finding

PHASE 3 | MONTH 3
Convert

- Conference speaking session
- Pre-event dinner for Tier 1 accounts
- Blog and podcast #3 with event takeaways
- Post-event nurture

THE HUB

Gated landing page, connected to CRM

Sales and account managers share it directly with prospects and customers.

KPIs

- Target account engagement
- Hub conversions
- Meetings booked
- Pipeline sourced and influenced

Be the company the market already knows before the first sales call.

Earned attention builds the trust paid media can't buy.

Executive Thought Leadership

- A clear point of view for the CEO and key leaders
- Bylined articles, LinkedIn presence, and podcast guest spots
- Speaking slots at the events our buyers attend

Media & Analyst Relations

- Targeted pitching to trade publications our buyers read
- Analyst briefings to shape how the category is described
- Data-driven stories pulled from our hubs and customer outcomes

Awards, Research & Proof

- Industry awards and rankings that validate the story
- Original research that earns coverage and citations
- Customer co-presentations and case study features

WHY IT MATTERS

Buyers trust what others say about us more than what we say about ourselves. Earned visibility also supports fundraising, recruiting, and company value.

HOW IT CONNECTS

Earned media is a spoke, not a separate program. Every quarterly hub should produce at least one story worth pitching. The same credible, third-party coverage also helps the brand show up in AI-generated answers.

WHERE PLANS BREAK

Thought leadership that's really a product pitch. If the point of view only works when you buy our product, it isn't a point of view.

Faster output, sharper targeting, same human judgment.

AI lets a lean team operate like a much bigger one. It doesn't replace knowing your buyer.

Research
Account briefs, competitive monitoring, win/loss and call analysis

Create
First drafts, one hub into dozens of spokes, all with editorial review

Personalize
Messaging by segment, persona, and account at scale

Operate
Scoring, routing, data hygiene, campaign QA, reporting

Be found
Credible content that shows up in AI-generated answers

WORKFLOWS IN PRACTICE

1 WEEK to **< 1 HOUR**

Research and reporting. Gathering market, account, and performance data and building it into a leadership-ready deck used to take a week. Now it takes less than an hour, so the team spends that week acting on the insights instead of assembling them.

Tier 1 account briefs
Public filings, news, leadership changes, and performance data summarized into a one-page brief before outreach.

One webinar, ten assets
Transcript turned into a blog, LinkedIn posts, an email, a short video script, and sales talking points.

GUARDRAILS

- **Brand voice standards on every output**
- **Human review for accuracy and claims**
- **No PHI or sensitive data in unapproved tools**
- **Compliance review for clinical or outcome claims**

WHY IT MATTERS

The cost of producing content has dropped. The cost of generic content has gone up, because buyers can spot it immediately. The advantage goes to teams who use AI for speed and humans for insight.

WHAT IS AI SEARCH VISIBILITY?

More buyers now start research by asking an AI assistant instead of searching. Clear, well-structured, credible content on your site and in trusted publications makes it more likely your company is part of the answer.

WHAT IF THE TEAM IS SKEPTICAL?

Start with one workflow that saves real time. Show the hours saved, then expand.

04

PART IV

Convert, Close, and Expand

One definition of ready. One revenue plan. Growth that continues after the contract is signed.

IN THIS SECTION

21 Scoring, Stages & the Handoff

22 Sales Enablement & Launches

23 Customer & Partner Marketing

One shared definition of "ready."

When marketing and sales agree on what a qualified account looks like, the handoff stops being a debate.

FIT X ENGAGEMENT

ILLUSTRATIVE

	ENGAGEMENT: Low	Medium	High
Fit A	Nurture & ABM	Prioritize	Sales now
Fit B	Nurture	Nurture & watch	Prioritize
Fit C	Deprioritize	Deprioritize	Review, don't chase

- **Fit score:** how closely the account and contact match the ICP
- **Engagement score:** behavior and intent, weighted by recency (pricing page visits, repeat visits, webinar attendance, multiple contacts from one account)
- **Account-level qualification** alongside lead-level, so buying group activity counts
- **Clear ownership of follow-up:** SDRs or account executives work qualified accounts within an agreed window
- **Two-way SLA:** Marketing commits to volume and quality. Sales commits to speed of follow-up and feedback.

STAGE FLOW

WHY IT MATTERS

Without shared definitions, marketing reports success while sales reports bad leads. Both can be right. Agreed stages and scoring end that argument.

HOW WE TUNE IT

Review monthly. Compare scores against what actually converted, then adjust weights and thresholds. Scoring is a hypothesis we keep testing, not a formula we set once.

WHERE PLANS BREAK

Dirty data. Scoring only works if the CRM is clean. Duplicate records, missing account links, and stale contacts come first.

Marketing and sales run one revenue plan.

The best campaign in the world fails if sales can't carry the message into the room.

Competitive Battlecards

- Head-to-head positioning against named competitors
- Objection handling for common pushback
- "Why us, why now" talking points by persona

Outcome & ROI Assets

- Case studies with measurable results
- ROI framework for prospect-specific business cases
- Reference customer program

Deal-Stage Toolkits

- **Discovery:** call guides and qualifying questions
- **Proposal:** business case templates and pricing one-pagers
- **Close:** implementation roadmap and onboarding preview

PRODUCT LAUNCHES

Launch tiers
Major launches get a full campaign. Minor releases get enablement and customer communication.

Every launch includes
Positioning, sales training, customer messaging, and a success metric.

Readiness together
Product, marketing, and sales agree on launch dates and readiness.

HOW WE STAY ALIGNED

Weekly pipeline review with sales leadership. Quarterly planning together: goals, themes, events, and content gaps. An annual kickoff to launch messaging and campaigns.

WHY IT MATTERS

Sales teams use what they helped shape. Building enablement with sales, not for them, is the difference between assets that get used and assets that sit in a folder.

WHAT IF THERE'S NO REVOPS?

Marketing can own the process to start: a shared pipeline view, agreed stage definitions, and a weekly 30-minute review. Structure matters more than tools early on.

The fastest growth often comes from people who already know us.

Existing customers and partners are the warmest pipeline we have. They deserve a plan and a number.

EXPAND & RETAIN

Customer Marketing

- Expansion campaigns for upsell and cross-sell, built with account management
- Customer advisory board and user summit to deepen relationships
- Advocacy program: references, case studies, speaking, and reviews
- Health checks and success stories that support renewals

TARGET
Expansion pipeline, supporting net revenue retention

REACH & TRUST

Partner & Ecosystem Marketing

- Co-marketing with technology and channel partners: joint content, webinars, and events
- Partner enablement kits so partners can tell our story accurately
- Shared target account lists for coordinated ABM plays

TARGET
Partner-sourced and partner-influenced pipeline

WHY IT MATTERS

Selling more to a happy customer costs far less than winning a new one. Partners already have the trust of accounts we want to reach.

HEALTHCARE LENS

Health plans and health systems talk to each other. A strong reference from one regional plan can open doors at the next. Customer advocacy is a growth channel, not a courtesy.

05

PART V

Run the Machine

Measure what matters. Invest wisely. Build in the right order.

IN THIS SECTION

25 Measure What Matters

26 Fund the Number

27 Sequencing by Stage

28 Team & Operating Cadence

29 First 90 Days

30 Proof It Works

Report on revenue, not activity.

Leading indicators tell us if we're on track. Lagging indicators tell us if it worked.

MARKETING PERFORMANCE DASHBOARD

ILLUSTRATIVE

LEADING INDICATORS | TRACKED WEEKLY

142	3.4	$4.1M	22%	38
Target accounts engaged (of 200)	Contacts engaged per account	Pipeline created, sourced and influenced	Qualified account conversion	Meetings booked this month

LAGGING INDICATORS | MONTHLY & QUARTERLY

$1.2M	31% / 18%	268 days	112%	14 mo
Marketing-sourced revenue, year to date	Win rate, engaged vs. non-engaged	Average deal cycle	Net revenue retention	CAC payback

KILL, SCALE, OR ITERATE

Kill | Scale | Iterate

Every program is reviewed on a set cadence. Programs that work get more budget. Programs that don't get changed or cut.

SIGNAL WE DON'T IGNORE

Self-reported attribution trends from demo forms and discovery calls.

One board-ready view connecting marketing spend to pipeline and revenue.

If marketing owns the number, the budget has to match it.

The budget isn't a starting point. It's the answer to a math problem.

THE BUDGET EQUATION

ILLUSTRATIVE

24
Sourced opportunities needed (page 13)

×

$ per opp
Cost per sourced opportunity, from history or benchmarks

=

Investment
Program budget the number requires

ALLOCATION BY PROGRAM

- Demand generation and paid media
- ABM programs
- Events and field marketing
- Content and creative
- Marketing technology and data
- PR, analysts, and awards

WHEN THE BUDGET AND THE NUMBER DON'T MATCH

1
Fund it.
Invest what the math says the number requires.

2
Find leverage.
Shift toward higher-efficiency programs: Tier 1 ABM, partners, customer referrals, and executive and sales distribution. Reallocate from underperformers. Use AI to lower production cost.

3
Reset the number.
Adjust the sourced target or the timeline to fit the investment, and agree on it in writing.

WHY LEAD WITH THE MATH

It changes the conversation from "how much can marketing have?" to "what will it take to hit the goal?" Leadership makes an informed choice, and marketing is accountable to a number it agreed to.

TRACKING THE RETURN

Pipeline-to-spend ratio, CAC, and payback reviewed quarterly with Finance. Hold 10 to 15% in reserve to double down on what's working mid-year.

WHERE PLANS BREAK

A number without the budget, or a budget without a number. Either way, marketing is set up to miss, and nobody finds out until Q3.

HEALTHCARE LENS

Big industry events can consume a large share of the budget. Evaluate each one on pipeline, not tradition.

Build in the right order. Not everything on day one.

The plan scales with the company. Knowing what to skip is as important as knowing what to do.

STAGE 1
Founding
1 to 2 marketers plus partners | Lean budget

- Foundation: ICP, brand story, messaging, website
- Tier 1 ABM with 10 to 15 accounts
- Founder and executive voice
- Core sales enablement
- Simple pipeline tracking and self-reported attribution

HOLD FOR NOW
Broad paid media, large events, complex scoring tools

STAGE 2
Scaling
3 to 5 marketers | Growing budget

- Quarterly hub and spoke campaigns
- Tier 2 ABM by segment
- Scoring and a marketing operations hire
- Targeted events and speaking
- Customer marketing and references

HOLD FOR NOW
Full analyst program, multi-region field marketing

STAGE 3
Scale
6+ marketers | Full program budget

- Full ABM tiers with intent data
- Partner and ecosystem programs
- Analyst relations and original research
- User summit and customer advisory board
- Multi-product launch framework

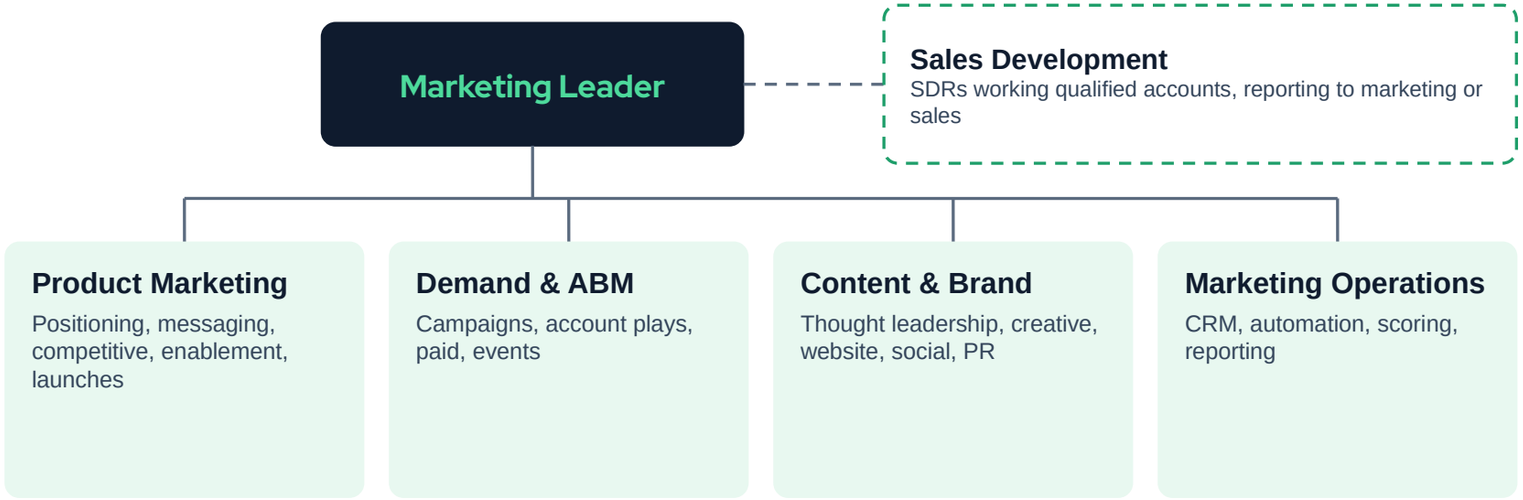
THEN
Keep tuning with kill, scale, or iterate

Stage depends on the sales motion and market, not just headcount. A small team selling large enterprise deals may start with Tier 1 ABM before anything else.

A lean team, built around the work that matters most.

Hire for what's core. Use partners and AI for speed everywhere else.

ORG DESIGN



OPERATING CADENCE

ANNUAL
Plan, budget, and targets set with the executive team

QUARTERLY
Hub themes, campaigns, launches, and events planned with sales

MONTHLY
Performance review and scoring tune-up

WEEKLY
Pipeline sync and project status

HOW I BUILD TEAMS

Early on, one strong generalist and a few trusted specialists go further than a full department. I add headcount where the work is core and repeatable, and use agencies and contractors for spikes.

WHERE SDRS SIT

It depends on the motion. What matters is one owner for follow-up, shared targets with marketing, and a feedback loop on account quality.

WHY CADENCE MATTERS

A rhythm keeps marketing connected to the business. Without it, plans drift from what sales and leadership actually need.

A realistic start, not a theoretical roadmap.

Listen first, build fast, and show progress inside the first quarter.

DAY 1 — DAY 30 — DAY 60 — DAY 90

DAYS 1 TO 30
Assess & Align

- ✓ Meet with leadership, sales, product, customer success, and five or more customers
- ✓ Audit programs, tech stack, data quality, and reporting
- ✓ Agree on ICP, the number marketing owns, and stage definitions with Sales and RevOps
- ✓ Identify quick wins

DAYS 31 TO 60
Build the Engine

- ✓ Clean up the data that scoring and reporting depend on
- ✓ Launch a Tier 1 ABM pilot with 10 to 15 accounts
- ✓ Launch the first quarterly hub and spoke campaign
- ✓ Stand up the pipeline dashboard and self-reported attribution
- ✓ Deliver the first sales enablement assets

DAYS 61 TO 90
Prove & Scale

- ✓ Report engagement and pipeline created to leadership
- ✓ Double down on what's working, cut what isn't
- ✓ Finalize team plan and budget
- ✓ Set next-quarter targets based on real data

WHAT 90 DAYS WILL SHOW Engagement, meetings, and early pipeline.

WHAT IT WON'T SHOW YET Closed revenue from new programs, and we'll say so up front.

PROOF IT WORKS

This isn't theory. It's how I've built growth before.

Revenue figures cover each full tenure. All other results are full-year numbers.

REFERWELL

2.7x

Revenue growth, from $3.6M to almost $10M, after rebuilding positioning, brand, and the demand engine.

REFERWELL

867%

Health plan contracts grew from 6 to 52 in year one after repositioning the company.

DIAMETER HEALTH

3.7x

Revenue growth, from $6.5M to $24M, ahead of the Availity acquisition.

DIAMETER HEALTH

5x

Monthly MQLs after the brand launch, with campaigns converting at 20 to 29%.

DIAMETER HEALTH

2x

Revenue growth in year one, supported by unifying HubSpot and Salesforce into one view of the funnel.

THE BURGESS GROUP

Rebrand

Led a full rebrand that repositioned the company ahead of its acquisition by HealthEdge.

THE PATTERN

Three companies, the same approach: build the foundation, connect marketing to revenue, follow the data, and double down on what works.

WHERE IT WAS BUILT

The Burgess Group, acquired by HealthEdge.

Diameter Health, acquired by Availity.

ReferWell, care navigation and referral management for health plans, health systems, and provider groups.

LET'S GO

Ready to build the engine?

I'd welcome the chance to talk through how this plan fits what you're building.

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