

The Complete Guide to B2B Lead Generation

**When Business Conditions Are
Challenging**



New Leads Are the Lifeblood of Your Business; Here's How To Keep Them Flowing

Now more than ever, effective lead generation helps companies do more than just survive. The ability to create a predictable, repeatable and scalable lead generation machine helps companies thrive no matter what's going on outside your doors.

With so much uncertainty, business executives can be swayed into considering short-term and often expensive marketing gimmicks.

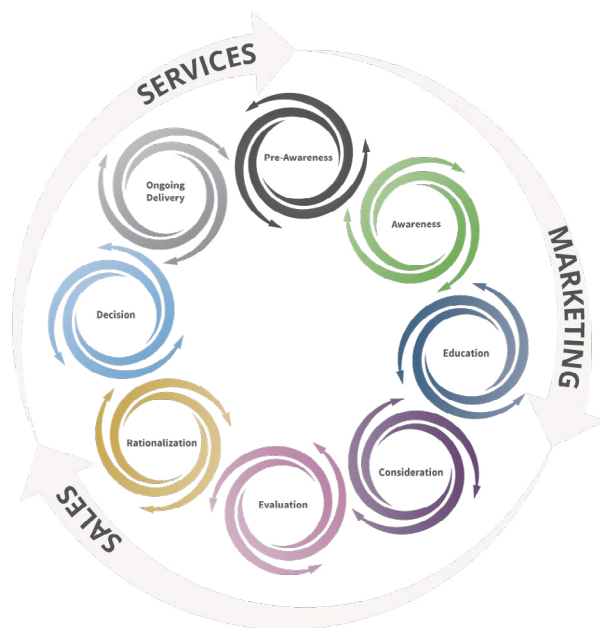
Challenging times also uncover a lack of marketing strategy. Strategy beats execution every time.

The problem is lack of strategy and hit-or-miss marketing tactics don't deliver. Countless hours and dollars spent on campaigns still fail to deliver a return on investment (ROI). As a result, pipelines shrink, sales stall and revenues miss the mark.

To succeed in today's environment, companies must build trust with buyers. Successful revenue generation is the result of effective strategy, solid tactical execution, a deep understanding of analytics and the ability to systematize all aspects of revenue generation across your company. All four pillars are key.

By using models like this (strategy, tactics, analytics and adding a system) that embrace the new way your prospects buy products and services, marketers improve efficiency, generate more high-quality leads and deliver sales opportunities to the sales team to hit revenue goals month over month.

Square 2 co-founders Mike Lieberman and Eric Keiles introduced the [Cyclonic Buyer Journey™](#) and the book [Smash the Funnel](#) to give business leaders some of the tools to rethink how they go to market. This innovative model smashed the traditional sales funnel. The result is a new revenue generation approach that moves at the speed of today's buyers.



The Cyclonic Buyer Journey helps you understand why today's customers feel anxious. It focuses on how buyers behave and the tactics needed to earn their attention. With the right strategies, tactics and tracking systems, you adjust to each buyer's journey with ease.

Rather than forcing them into a dated funnel, you'll move your prospects from Pre-Awareness to Ongoing Delivery proactively, shortening your sales cycle and increasing your close rate.

Table of Contents

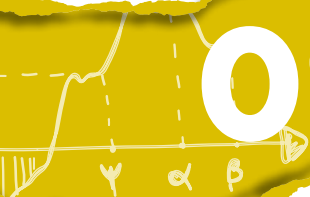
To help you develop an effective lead generation strategy, this guide consists of five sections:



04

Chapter 1: Strategy Before Tactics

Developing your revenue generation strategy before deploying tactics that work



09

Chapter 2: The Math of Lead Generation

Calculating the number of leads your business needs at the beginning of the buyer journey and how to reach your lead goals



12

Chapter 3: Selecting the Tactics

Choosing the right tactics to use throughout the buyer's journey



20

Chapter 4: Tracking the Metrics

Using data and analytics and to regularly monitor performance



22

Chapter 5: You Need a Revenue Generation System

Installing a system to align marketing, sales and customer service to hit your revenue goals



25

Conclusion

The goal of each section is to help guide you through a complex set of decisions. We'll show you how to apply the Cyclonic Buyer Journey, select the right tactics to use, track key metrics and use a system to make it easy and efficient.



CHAPTER 1

Strategy Before Tactics



Developing your revenue generation strategy before deploying tactics that work

The last few years have introduced massive amounts of change when it comes to marketing and sales. Going forward, this change is going to accelerate. Privacy rules, government regulation, artificial intelligence and technology aren't making it easier to get in front of prospects – they're making it harder.

Information overload has extended the customer decision-making process. People get too many emails, too many spam calls, too many unsolicited LinkedIn connection requests and too many out-of-the-blue ads on social media.

The number of people involved in the decision-making process has grown from 5.4 to 6.8.

– Harvard Business Review

Research revealed that the customer journey is not rigidly linear, as depicted in the sales funnel model, but rather circular. It is a network of touch points, decisions and opportunities that are either appropriated or rejected by the buyer.

– McKinsey & Company

To create a lead generation machine, you need to understand that today's buyer journey is filled with uncertainty and complexity.

To make sure you have the right strategy elements, here's what must be part of your lead generation strategy before you move into tactics.

Persona Development

- Who do we want to attract with our marketing? For example, what do our best customers look like and how do we find more of them?
- What is the profile for these people?
- What are their demographic characteristics and their psychographic characteristics?
- Is the profile detailed enough?
- Do we know where they spend their time? What blogs do they read? What sites do they visit? What videos do they watch? What webinars do they attend?

Message Development

- What is our Big Story? What supporting stories are important to moving prospects through the buyer journey?
- How do we get our story to stand out vs. our competition?
- Is the story disruptive, compelling and emotional?
- Do the stories align with the pains and challenges of our prospect?
- Does everyone in the company know our stories and can they share them?

Disruptive

Shake their status quo, wake them up, get their attention, motivate them, grab them and move them to act.

Compelling

Tell them a story that demands they at least explore what you have to say.

Emotional

The best stories are emotional. What might your company do for them that could change their life, career or company situation in a way that makes them feel something?

Differentiation

- What makes our business remarkable?
- What can we say that no other competitor can say?
- How do these remarkable elements help our prospects feel good about doing business with us?
- How sustainable are these elements? How long will it be before our competitors start saying something similar?
- What remarkable elements can we aspire to add over the next few months and years?



Check out some examples of other companies that are doing remarkable right.

Performance Expectations

- What do we expect from this marketing initiative?
- How many leads do we expect over what time period?
- How many sales opportunities do we expect over what time period?
- How do we expect this to scale up over time?
- What other business changes will be required to realize these expectations?

Buyer Journey Mapping

- Do we know the stages of our prospects' buyer journeys?
- Do we know every single touch point along that buyer journey?
- Do we have the ability to influence a prospect at each stage of the buyer journey?
- Do we have the ability to easily improve the touch points at each stage?
- Do we know the questions prospects ask and the emotions prospects feel at each stage?



Here are some more details on how to do buyer journey mapping.



Budget and Investment

- How much investment is required to ramp up our marketing?
- How much investment is required to keep it going after the initial ramp-up?
- How do we measure the relation between investment and performance?
- Once it's set up, what investment could be required if we choose to scale it up?
- How is that investment distributed? Inside team? Outside agency? Media? Technology?



[Here are more details on the budget and investment setting process.](#)

Sales Alignment

- How does the sales team need to be aligned to take advantage of more lead generation?
- Do we have the right team or people in place?
- Do we have the right systems, playbooks or technology in place?
- How do we keep the sales team and the marketing team on the same page?
- How does sales provide feedback to marketing?

Need data to justify a tighter alignment between sales and marketing?



[This link will give you all the data you need to justify your new alignment plan.](#)

Customer Advocacy

- Do we have customer success stories to fuel marketing and sales?
- Do we have enough referrals from customers?
- Do we have enough customers willing to write online reviews?
- How easy is it for us to produce references in the sales process?
- Are most customers willing to go on video to talk about our products/services?

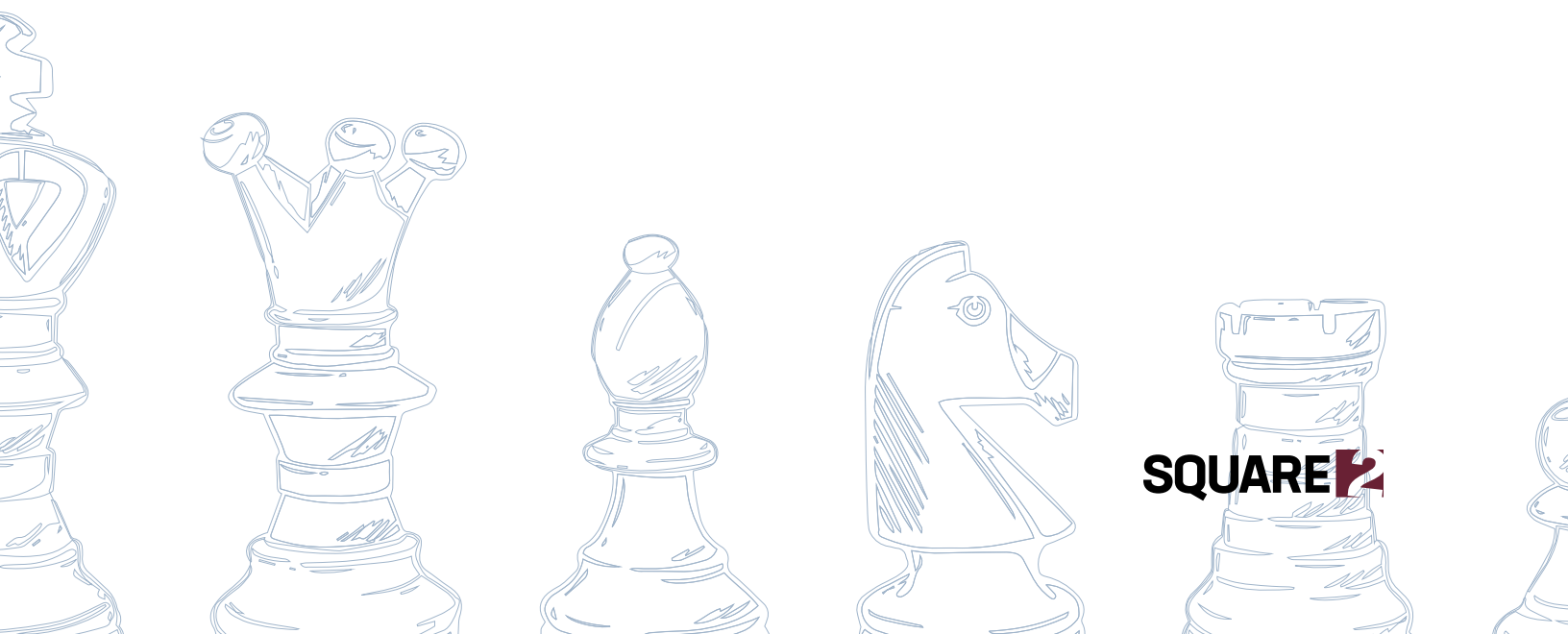
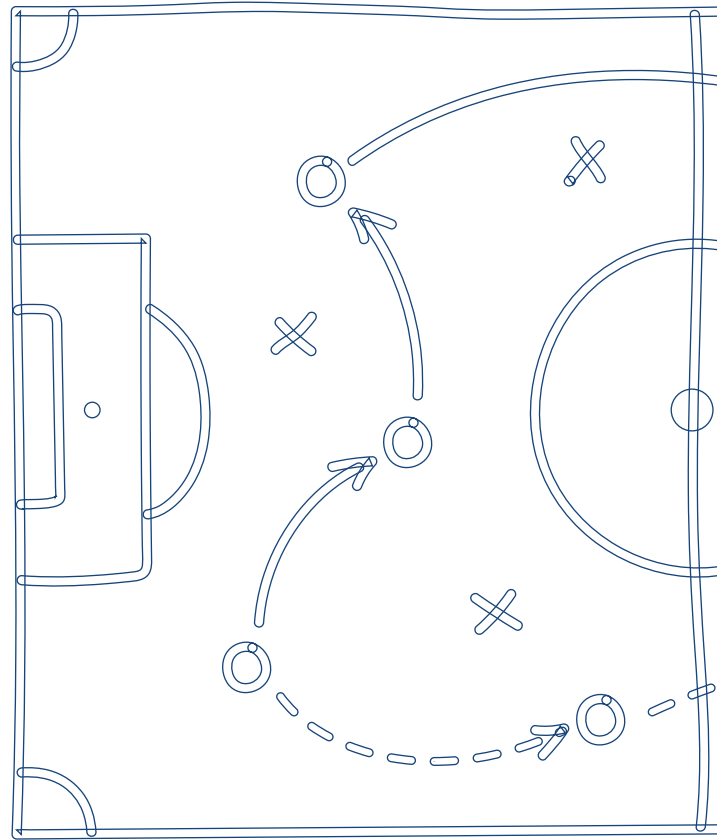
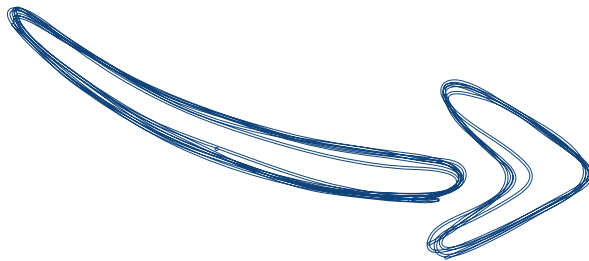
Advocacy can be tricky. If you want to learn a little more about the subject, [check out this article from our blog.](#)

Company Priority

- How important is this initiative to the long-term success of our business?
- If we do nothing, what is the potential impact on our business?
- If this isn't successful, what is our Plan B?
- Do we trust that the people responsible and accountable for this initiative will be successful?
- How will we know if this initiative is successful? What are the business outcomes that we can touch, see and feel?

As you move buyers through the eight stages of the Cyclonic Buyer Journey, you need tactics that work – carefully written emails, campaigns with the right influencers, targeted pay-per-click ads, etc. A complete strategy sets clear revenue goals that focus on your efforts and deliver quantifiable results.

A strong strategy puts an end to any hit-or-miss marketing. Rooted in an understanding of your ideal customer, it amplifies your efforts. With a method in place, you gain alignment and consistency. The results of your tactics then become exponential and yield revenue.





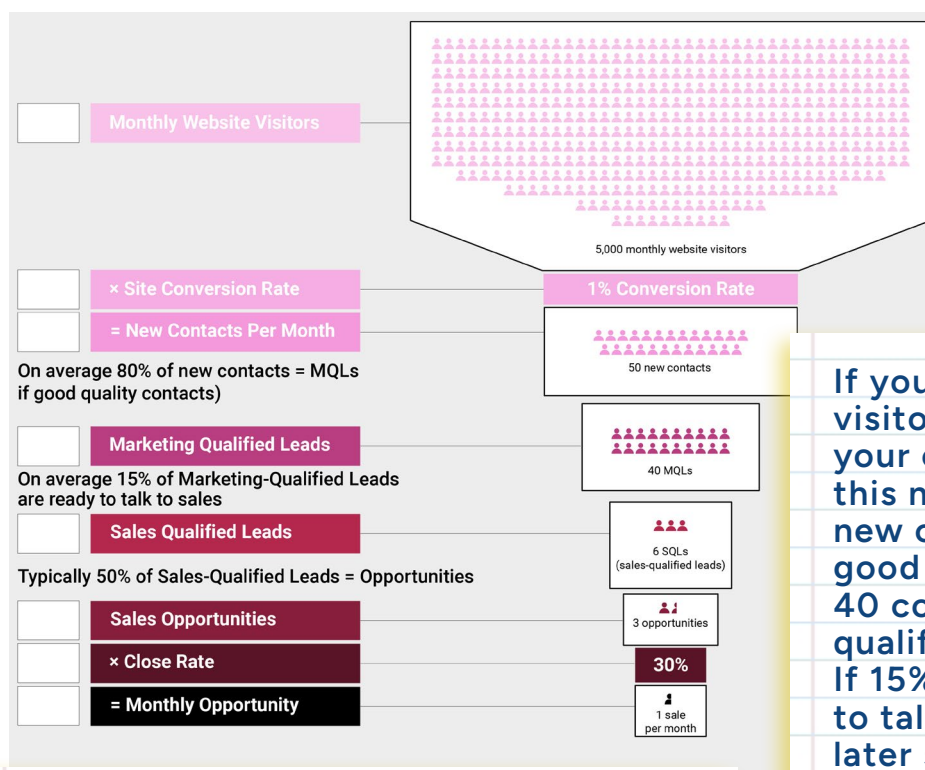
CHAPTER 2

The Math of Lead Generation

Calculating the number of leads your business needs at the beginning of the buyer journey and how to reach your lead goals

You need to generate leads for your business. How many leads? It turns out there's a definite number of leads and a conversion rate that you should hit at each stage of the buyer's journey. These numbers keep you on track to reach your desired revenue levels. If you've never backed into your marketing tactical play based on data, you're not alone. But there's nothing like math to show you the money.

Take a look at this example:



If your website gets 5,000 visitors every month and your conversion rate is 1%, this means you have 50 new contacts. If they're good quality, 80% or 40 could be marketing-qualified leads (MQLs). If 15% of them are ready to talk to sales or in the later stages of their buyer journey, this equals six sales-qualified leads (SQLs).

Typically, 50% of those six qualified leads become sales opportunities, leaving you with only three sales opportunities per month. And if your closing rate is 30%, then your digital marketing and accompanying sales process is only yielding one new client every month. That's not nearly enough to grow.

Now, if you want five new customers a month from your digital marketing and sales process, you can back into that using the same math.

Having 10,000 website visitors a month and a 1.5% site-wide conversion rate will produce 150 new contacts.

Using some of the same metrics, 80% of them would be MQLs, for 120.

If 15% are ready to talk to sales, that's 18 SQLs.

If 50% of those are sales opportunities, you're looking at nine sales opportunities. If you continue to close 30%, you're now doing three new customers a month.

That's a 300% improvement.

If you can get your close rate to 50%, you're now closing four to five new customers a month, and your business is growing at a dramatic level.



Numbers give you incredible insight into what you should be working on from a marketing and sales perspective. To get more insight into figuring out how many leads you need to hit your goals, [check out this article](#).

Now that you know what numbers you need to produce, it's much easier to identify which tactics to include in your marketing, sales and customer service execution plans.

In the next section, we'll help you learn how to prioritize your efforts, because very few people, teams or companies can do all of this at the same time. Picking the tactics that will have the biggest impact for the least amount of effort is the secret.





CHAPTER 3

Selecting the Tactics

Choosing the right tactics to use throughout the buyer's journey

Each stage of the Cyclonic Buyer Journey has a set of tactics that attracts potential prospects, engages active prospects, converts prospects into sales opportunities, nurtures sales opportunities and then contributes to them closing. These tactics, if designed and orchestrated properly, move buyers from one step to the next in the process.

As you start to look at tactics, keep in mind that most tactics work across various stages of the buyer journey. Today there are hundreds of tactics and thousands of ways to configure tactics. What we're showing here is just one potential deployment of tactics to illustrate the configuration and orchestration effort required to thread tactics together around execution.

Add Traffic

- Search Engine Optimization (SEO)
- Influencer Marketing
- Email Marketing
- Social Media
- Backlink-Building

Add MQLs

- Content Marketing
- Onsite Optimization
- Website Upgrades
- Video Marketing

Add SQLs

- Ongoing Email Marketing
- Lead-Scoring Modeling
- Lead-Nurturing Campaigns

Increase Close Rate

- Sales Process
- Sales Team Content
- Sales Technology
- Case Studies
- References/Reviews
- Your Proposals

Here are key tactics and highlights of each stage:

Pre-Awareness Stage

Some prospects don't know you exist. They might have the specific pain, issue or challenge you help with, but for whatever reason, they don't realize solutions are available or their pains are not nearly acute enough to have their attention. We call that *Pre-Awareness*.

Account-Based Marketing

ABM is a collection of tactics designed into a campaign to disrupt, connect, engage and drive sales leads at a very specific set of targeted people at targeted companies.



To learn more about [account-based marketing](#), visit [this page](#).

Demand Generation Campaigns

These campaigns are a collection of tactics designed to proactively target potential prospects. They typically include audience targeting, message development, content development, paid social media and paid search advertising, retargeting or remarketing online, email marketing and the metrics for measuring effectiveness, efficiency and overall performance.

Social Media Paid Ads

Social media platforms offer amazing targeting capabilities. This tactic includes the targeting, budget development, content development, ad copy, ad strategy and ad deployment on platforms like LinkedIn and Facebook.

Paid Ads on Google and Bing

Ad campaigns include the targeting, budget development, content development, ad copy, ad strategy and ad deployment on platforms like Google and, to a lesser extent, Bing.

Retargeting

You've seen banner ads follow you around on the web. Once you click on an ad, you see a steady stream of additional ads or similar ads. This is called remarketing or retargeting. This is typically done on the Google platform and is usually connected to a Google Ads campaign.

Cold Email Marketing

While not optimal, today you can purchase a list of targeted email addresses and go after those people with email outreach. Some of the challenges associated with tactics like this is their noncompliance with [GDPR](#), [CASL](#) and CCPA (California Consumer Privacy Act).

Influencer Marketing

Almost every industry has thought leaders who have their own audiences. Using those people to reach their audiences with your message can be very effective at disrupting people in the Pre-Awareness stage and getting them to start a buyer journey.



Want to learn more about how [influencer marketing drives leads](#)? Visit [this page](#).

Affiliate Marketing

In a similar way to influencer marketing, affiliate marketing uses existing organizations, associations, membership groups, networks and other connected communities to leverage their audiences to make them aware of your products or services.

Awareness Stage

Awareness is the stage when people start paying attention to potential solutions. It's when they might be open to information related to their issue, pain or challenge. In this stage they are still reactive and not yet proactive.

Event Marketing (Virtual)

Understand that while events might never return to their pre-COVID levels, they will continue to be important. Having events is key to attracting and inviting people in this stage of their buyer journey, especially when the event is packed with educational information.



To see how progressive companies are shifting their event strategy, visit [this page](#).

Content Marketing (All Types)

While people in this stage are NOT proactive in their search for information, they are now aware and alert to information that is helpful, so the content you create can attract their attention.

Blogging and Guest Blogging

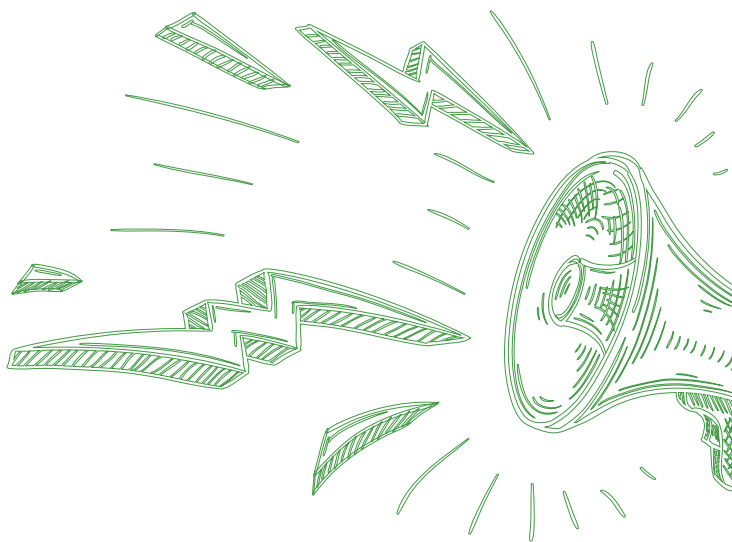
This light, typically short and easily shareable content is often among the best types of content to get people in the Awareness Stage to be initially exposed to new brands, new services, new products and new companies.

Social Media Marketing

Social media platforms like Facebook, LinkedIn, Twitter, Reddit, Medium and Instagram all offer the ability to get educational information in front of people who are casually looking for information, products or services like yours.

Mobile Advertising

Ever thought your smartphone is listening to your conversations? It might not be doing so directly, but there are tools that allow mobile ads to be served up to people who have expressed "intent" to show interest in your products or services.



Education Stage

The Education Stage is when prospects start proactively looking for information or research around the possibility of doing (or buying) something different from what they've been doing (or buying).

Search Engine Optimization

Since people in the Education Stage are proactive now, search is one of the most important marketing tactics. If you're not visible on the search engines, your business is invisible. You have to make sure your website pages, content and company listings are highly optimized for your targeted keywords, keyword phrases and questions related to your industry, company and products or services.

Conversational Marketing (Chat)

Today, most people want information when they want it, and giving them immediate access to people via chat on your website provides instant access to the educational information they're looking for.



[To learn more about how to use chat on your website to drive leads and sales opportunities, visit this page.](#)

Content Marketing

Educational content is a core marketing tactic simply because people are looking for self-service education via every company's website. Your content needs to be diverse in its format, including video, podcasts, slide shows, infographics, e-books, whitepapers, pillar pages, tip sheets and research studies. Your content needs to be directly aligned with the questions prospects are asking at various stages of the buyer journey.

Website Design

Today your website is everything. You have 10 seconds upon a visitor's arrival to keep them or lose them. Your design needs to be clean and easy to navigate, and people need to know why they should stick around upon arrival. Then your site needs to lead prospects through the pages, providing relevant educational offers all through the site based on their buyer journey.



[To learn more about how to create a website that helps generate leads, visit this page.](#)

Email Marketing

Your prospect database is important for staying connected and continuing the conversation with prospects. Make sure your database is segmented by role and industry to start.

Consideration Stage

Eventually, prospects have to start narrowing down their options. They discover what they like and don't like, and what they need and don't need. When they have narrowed down the potential solutions to just a few, they enter into the [Consideration Stage](#), where they start to look more closely at their selected handful of options.

Content Marketing

There are very specific slices of content for different stages of the buyer journey. People in the Consideration Stage will need different content than those in other stages.

Lead Nurturing

Since most of these people are now in your prospect database, they can be nurtured with ongoing emails to either proactively move them through their buyer journey, offer them content related to their stage of the buyer journey or give them the opportunity to signal to you that they are moving to the next stage of the buyer journey.

Lead Scoring

We mentioned signaling in the lead nurturing item. But you should consider scoring leads based on their onsite and offsite behavior, then using that score to decide which automated nurture emails are delivered and/or when sales gets proactive in picking up the prospect to help them on their journey.



Evaluation Stage

Now that the prospects are serious, the hard work of [evaluation](#) begins. This stage is typically where sales gets involved. One or two people may have done the research and background work, but now that they're looking at pricing, capabilities, features and benefits, the power people are involved.

Sales Process

The Evaluation Stage is typically when prospects move from marketing to sales. The prospect has gotten everything possible without needing a sales rep, but now to continue their journey they need to speak with a salesperson. How you pick up this person and handle them is going to be critical. The educational and guided approach to influencing their buyer journey needs to continue.

Qualification Methodology

You'll want a companywide qualification methodology so that your sales and marketing people are talking the same language. We use [Pain](#), [Power](#), [Fit](#) and a score that runs from 0 to 15, with 15 as the highest score. Other companies use BANT (Budget, Authority, Need, Timeline).

Sales Emails

All salespeople have emails they use in the sales process. But there should be stock emails or templates that make emailing easy, consistent and effective. These can be personalized or customized. These can also be measured for effectiveness and adjusted to improve performance.

Sales Content

Marketing served up content during the early stages of the buyer journey, but now sales needs content to be offered up to prospects later in the buyer journey. Again, creating these and training reps on how to use them, when to use them and what to use these content pieces for will create a more consistent sales process.

Rationalization Stage

This stage is where prospects ask the tough questions: When do you expect me to see a positive return on investment (ROI)? What are your payment terms and are they flexible? Who specifically will we be working with on this project? When do you expect delivery to be completed? Your prospect has already emotionally decided on you as an option but now needs to develop a [*rationalization*](#) for it.

References

Most companies with long sales cycles, high ticket averages and complex sales need references to get prospects over the finish line. Creating a video reference reel, providing it to sales and having sales send it out before references are requested with a carefully crafted email can cut the number of reference requests in half.

Recommendations

How you present your recommendations to prospects can make or break your ability to close the deal. If you spend too much time talking about your company and not enough time talking about how you're going to help the prospect, you could be torpedoing your close rates.

Reviews

You could argue that reviews are a more upstream early buyer journey tactic, but most people start backtracking and looking at reviews late to "check the box" on reviews. You need enough reviews to make sure this doesn't derail your sale, and getting reviews is something that should be operationalized and ongoing.



[*Visit this page to learn more about asking for and getting reviews.*](#)



Decision Stage

Even after officially making the [decision](#), the buyer still has to talk about contract details, agreement terms and other legal aspects of their new working relationship. It's not final until the paperwork is signed.

Proposal/Agreement/Contracts

Your paperwork can be one of the biggest challenges in getting deals across the finish line. If you send a legal agreement to a business contact, they're going to be anxious and need to involve legal, slowing down your sales cycle. Keeping the agreement less legal would allow them to review and sign it quicker.

Ongoing Delivery Stage

The end game is not just getting a new customer. Your goal is to create a customer so happy that they tell everyone about you, buy more from you and continue working with you into year two. [Ongoing delivery](#) ensures your customers are an active advocate for your company.

Advocacy Marketing

This refers to a collection of tactics used to operationalize the advocacy of your customer base. You need a program that encourages customers to write reviews, be a reference, participate in case studies and actively refer you to other people who fit your target customer profile.



[To learn more about advocacy marketing, visit this page.](#)

Client Satisfaction Scoring

You should be considering a methodology for proactively and continuously getting data on the level of happiness or satisfaction from your customer base.



[We created a detailed set of recommendations on this page.](#)

Customer Email Marketing

We mention this because it's missing so many times. As strategically as you market to prospects, you should also be marketing to current customers.

Cross-Sell/Upsell Campaigns

You should always be marketing to current customers. This includes additional products or services they're not currently buying and sharing opportunities for them to extend and/or expand your share of wallet with them.

Again, as you start to look at tactics, keep in mind that most tactics work across various stages of the buyer journey. What we're showing here is just one potential configuration or set of recommendations for tactics to illustrate the orchestration effort required to thread tactics together around execution.



CHAPTER 4

Tracking the Metrics



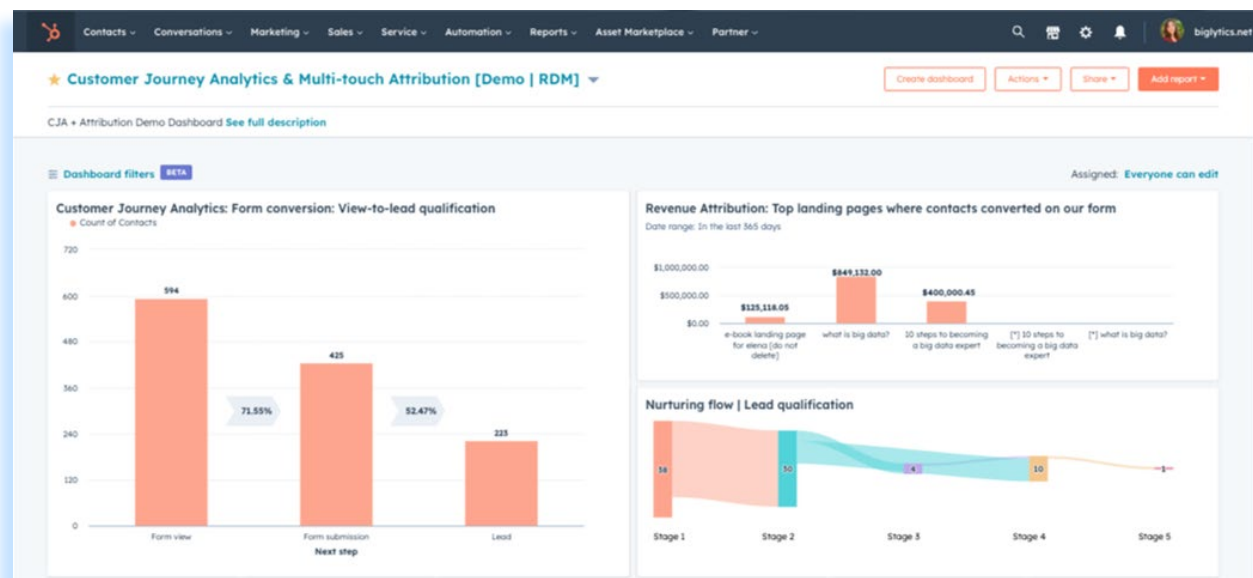
Updating data and analytics to regularly monitor performance

When implementing your lead generation and revenue growth strategy, data becomes the basis for truth and understanding.

Today, marketing, sales and customer service can be measured, and the insights derived from the data uncovered helps inform ongoing recommendations that improve performance over time.

Instead of looking at data by tactic, which most marketing people still do, consider moving to a buyer journey slice of the data for a more holistic look at program performance.

For example, instead of just looking at email campaign data, look at all the data related to the Consideration Stage.



With the insight from these marketing, sales and customer service metrics, you unleash the full power of your revenue growth engine.

Finally, creating dashboards or reports and tracking numbers is *not* the end game. The numbers should be reviewed regularly with insights identified. Then create a monthly action plan that is used to continuously optimize your tactics based on data. This is one of the secrets to month-over-month revenue growth.



CHAPTER 5

You Need a Revenue Generation System



Installing a system to align marketing, sales and customer service to hit your revenue goals

Businesses run on systems. You have a system for paying the bills. You have a system for hiring. You have a system for firing. You have a system for manufacturing your products or delivering your services. Most of the best-run businesses have a system for everything. That's how they scale.

But when it comes to revenue generation, most businesses continue to rely on separate groups of people operating in a random and unreliable way.

A revenue generation system is the process, methodology and tools necessary to build repeatable, predictable, scalable revenue growth for your company.

Typically, these actions, steps and processes are executed in marketing, sales and customer service.

A revenue generation system:

- Ensures that all of these three typically disparate teams are working together inside the system to orchestrate the activities needed to help the company grow revenue.
- Includes ALL the necessary steps required to make sure that the company isn't missing anything necessary for revenue generation and business growth.
- Covers these four areas – strategy, tactics, campaigns and technology.

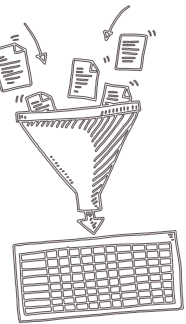


Today's buyers are faced with a massive amount of outreach and content. By focusing on strategy, tactics, campaigns and technology, your revenue generation system works to cut through that clutter and deliver your message to your prospects in a way that causes them to take action and engage with your company.

A revenue generation system has six key components.

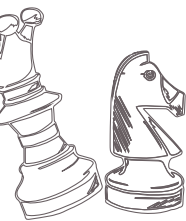
1. Process

When you add process to your revenue generation efforts, you install a repeatable, predictable and scalable framework and meeting rhythm that gets everyone working on the most important initiatives, prioritizing execution, reporting regular progress, resolving issues and tracking key performance metrics.



2. Strategy

A revenue generation system ensures you cover all the important elements needed to get your message in front of your target prospects. This includes identifying and prioritizing your target personas, defining your Big Story, making sure your company is truly remarkable, mapping your prospects' buyer journeys, aligning investment/budget with expected results and creating a scorecard to track progress.



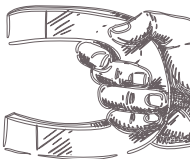
3. Tactics

With so many tactics at your disposal, most companies can't and shouldn't do them all. This part of a system helps you select the right tactics, prioritize those tactics and ensure the selected tactics are enough to get you to your goals.



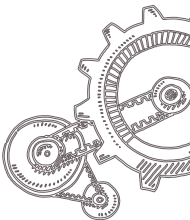
4. Campaigns

Once the tactics are selected, now you need to organize and orchestrate all those tactics into highly personalized, omnichannel campaigns that get your story and message in front of the people you want to attract to your business.



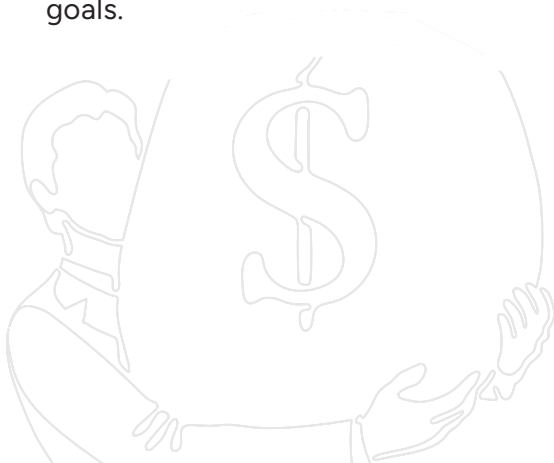
5. Technology

With so many tactics and so many campaign options, nobody can handle everything that needs to be done on their own. Technology, like HubSpot, is a critical part of a revenue generation system so that you're able to automate as many aspects of your execution as possible and then analyze the performance of your efforts to uncover insights, inform ongoing optimization and help you create smarter, more data-driven action plans.



6. Resources

Finally, no revenue generation system can be executed without the right resources or the right people with the right skills and resources. A system helps you align your plans with your internal team, external contractors or an outside agency. Once all the work required is covered, your system will be complete.





Conclusion



CONCLUSION

From growing startups to established corporations and everything in between, businesses of all sizes are at a loss today. The world has changed right below our feet. What worked last month might not work next month.

In these times of constant flux and an excess of information, strategy is more important than ever. But not just any strategy. You need an approach that embraces the dynamic nature of today's buyer journey.

As you build a lead generation and revenue growth strategy around the Cyclonic Buyer Journey, integrate tactics for today's environment. This contemporary approach to marketing aligns to today's buyer behavior. The result is an increase in leads and quantifiable growth for your bottom line.

Attracting Leads Starts With Telling a Stellar Story - Is Yours Working?

Schedule a free messaging audit to learn where your story is falling flat.

Schedule My Audit

SQUARE



Square 2 is a full-service revenue growth agency designed to produce results for clients. We help businesses understand the changing buyer journey and how revenue is directly related to marketing, sales and customer service execution. We help our clients with strategy, tactics, analytics and technology to build revenue generation machines that produce month-over-month revenue growth in a scalable, predictable and repeatable way. We use our Cyclonic Buyer Journey model to help clients map their prospects' buyer journeys to the right sales, marketing and customer service tactics. We use our AI-powered recommendation engine software called MAXG to drive a more scientific set of recommendations for our clients, and we're so sure of our approach that we guarantee results for clients every 90 days.

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