

Look behind the 'best practices' curtain...

Demand Generation **In Real Life**



Take a deep dive into how the sausage is really made in a 'modern' B2B demand generation operation.

By: Dane Christensen
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Introduction

Imagine this. You get a call from a colleague from a previous job who tells you she just became the Chief Marketing Officer of a hot B2B startup. The company was founded by a couple of industry heavyweights and VC firms are clamoring to invest. They're just coming out of stealth, and she needs to build a marketing team — fast! And oh yeah, she's thinking you are just the person to help her do it.

Score!

"So what size of a marketing team are we talking about?" you ask.

"Well, funding is not an issue", your CMO friend says. "The CEO said we should start with our mission statement and work down from there. Determine what we need to accomplish our objectives. We'll base our head count on that."

"Wow! Sounds awesome!" you exclaim.

"Yeah, right?" your friend replies. "So let's get started! Now, us being a B2B startup, we're going to be very focused on digital. We are all about Demand Generation."

"Of course", you say, leaning in.

"We've got a top-tier VP of Sales heading up a sales team who are currently working their own networks", the CMO continues. "But they will soon be looking to us to feed them a steady supply of qualified leads. Oh, and they're planning to hire more salespeople as soon as we get our lead flow going."

You shake your head, almost in disbelief for just a moment before regaining your composure and responding, "Well, looks like we've got our work cut out for us."

"We sure do", nods your friend. And we obviously can't do this alone, so your first order of business is to produce a list of all the positions we need to fill to build a killer demand gen machine that can pump in leads as fast as the sales team can work them."

"Got it", you say. "The Marketing Dream Team."

"Exactly!" the CMO exclaims. Now remember, budget isn't an issue, so just think of all the roles we'll need to fill. Let's review the list in three days and start planning our hiring."

Fast forward three days....

Now you, as the newly minted Director of Demand Generation, have spent the last few days perusing articles on demand generation strategy and tactics, scanning countless LinkedIn profiles, and massaging your list of potential hires. And it isn't just a list by now. You've added job descriptions and justifications for why each role is necessary. (There's a reason why she picked you as her Director of Demand Generation).

You peruse your Marketing Dream Team one more time, checking to make sure you've covered every possible angle (without being too greedy).

The Marketing Dream Team

Marketing Automation Manager

The Marketing Automation Manager ensures all lead data is flowing through the marketing automation platform (MAP) and into the customer relations management (CRM) or recycling through nurture streams to continually bolster demand. They set up attribution and lead scoring systems to provide as much knowledge as possible for every lead to enable segmentation, targeted messaging, and developing nurture streams that automatically prompt leads to engage in content of relevance at their stage in the lead lifecycle.

This role will also coordinate with the sales team to ensure clean hand-offs of Marketing Qualified Leads (MQLs) to the sales team as they become Sales Accepted Leads (SALs), as well as the efficient recycling of leads that do not progress through the sales pipeline. They are responsible for ensuring data hygiene. This person should have expertise on one or more marketing automation tools such as Marketo, HubSpot, Dynamics, or Pardot and CRM tools such as Salesforce, Oracle Sales, Netsuite or SugarCRM.

Importance of Role: *Essential*

Marketing Operations Manager

The Marketing Operations Manager will manage the various applications and systems on which the marketing programs are based. They will configure and optimize key applications such as the CRM, marketing Automation Tool, web servers, social media scheduling tools, webinar platform and various other tools used by the marketing team. Further, they are responsible for integrating these various systems so data flows seamlessly from one application to the next. They are also responsible for ensuring adherence to privacy standards and practices.

This person must be experienced with marketing campaign management and marketing automation, and have strong technical skills including web server management, system integrations through APIs and database management.

Importance of Role: *Essential*

Content Marketing Manager

The Content Marketing Manager provides a steady supply of content in a wide range of formats to be used through all of the various channels, ensuring that all content is fresh and engaging, supports core company and campaign messaging, and includes key words and phrases.

Working closely with the Product Team, the Campaigns Manager and the Content Producer (see below), this role will strategically plan development of content in the forms of white papers, data sheets, webinar presentations, case studies, thought leadership articles, blog posts, videos, infographics, etc, ensure that content conforms to messaging guidelines and quality standards, and manage the distribution of this content through the various channels.

Importance of Role: *Essential*

Content Developer(s)

While the Content Marketing Manager manages the process of producing and distributing content, the Content Developer is the person who actually writes the content. This may actually not be someone on the marketing team, but might be subject matter experts from other departments in the company.

Whether there is a dedicated person on the marketing team or a crowdsourced team from around the company, this role will ensure articles are both accurate and engaging. They should be very aware of pillar concepts and derivative key phrases and of the general guidelines for keyword density, but they should write their content primarily with their human audience in mind.

Importance of Role: *Optional (could be from other departments)*

Marketing Campaigns Manager

Campaigns form a basic building block of our marketing programs structure. This person will clearly define key attributes of campaigns such as channel, target market (lists), landing pages, forms, content, images, start date, end date, etc. They further ensure that all marketing activities are mapped to corresponding campaigns.

The Marketing Campaigns Manager will be responsible for identifying, designing, planning, testing, delivering, monitoring and enhancing cross-channel marketing campaigns in line with business objectives. This person should have experience in managing marketing campaigns across multiple channels including, content marketing, paid search, display advertising, native advertising, mobile, social media, etc.

Importance of Role: *Essential*

Social Media Manager

The Social Media Manager is responsible for expanding the company's social media footprint, constantly pushing marketing messaging through various social media channels and increasing follower engagement, including conversions to leads. They will coordinate with the Campaigns Manager, Content Manager, Creative Director, and other roles as needed to ensure social media conforms to marketing campaigns and is well-integrated with other marketing channels.

Importance of Role: *Essential*

Product Marketing Manager

The Product Marketing Manager is responsible for translating the specific features and benefits of company products into various forms of messaging (text, images, video, diagrams, etc.) that can be used in the various forms of content and marketing campaigns. This person may be a member of the marketing team, but will more likely be technically part of the product team, reporting directly to the product manager. Either way, they will coordinate closely with the Campaigns Manager, Content Marketing Manager and other marketing staff to ensure that all marketing campaigns related to products features and benefits focus on the messaging established by the marketing team.

Importance of Role: *Optional (could be from other departments)*

SEO Specialist

The SEO Specialist role is focused on driving organic traffic to all web properties by expanding the Search Engine Optimization (SEO) footprint. This entails a wide range of activities including keyword research, applying keyword optimization to web content, embedding outbound links, expanding and optimizing backlinks, syndicating content, applying SEO techniques in YouTube, etc., analyzing and reporting on organic traffic. This is a cross-functional role that will work closely with several other positions including web development, content development, social media, search engine marketing and web analytics.

Importance of Role: *Essential*

Search Engine Marketing Manager

The Search Engine Marketing (SEM) Manager is responsible for all paid search engine marketing advertising across various search engines (Google, Bing), social platforms (Facebook, LinkedIn, Twitter) and other paid advertising platforms with the objective of generating a steady flow of quality leads at all levels of the funnel. To accomplish this, this person will conduct a variety of tasks, including:

- Keyword research
- Create text and display ads
- Create calls-to-action
- Build landing pages
- Perform A/B testing on components of the SEM funnel
- Perform bid and campaign optimization to continuously improve on Key Performance Indicators (KPIs) such as:
 - cost-per-click (CPC)
 - cost-per-lead (CPL)
 - cost-per-MQL (CPMQL)
 - cost-per-SQL (CPSQL)
 - Return on Advertising Spend (ROAS)
- Analysis and reporting on campaign performance

Like the SEO Specialist, this role will interface regularly with several other team members including content development, design, web developer, campaign manager, web analytics and marketing automation.

Importance of Role: *Essential*

Display Advertising Manager

Distinct from the pay-per-click (PPC) advertising model managed by the SEM Manager, the Display Advertising Manager is responsible for advertising on other content-based advertising platforms which typically operate on a cost-per-impression (CPI) (more commonly referred to as CPM, or cost per 1000 impressions). Such platforms are typically industry or topic specific portals which often provide a suite of services in addition to paid advertising, such as sponsored content and email blasts. This role could also research display advertising on topical blogs and other niche publications, as well as content syndication opportunities.

Importance of Role: *Optional*

Email Marketing Manager

The Email Marketing Manager runs the all-important email marketing program, including promotional emails, newsletter, blog post announcements, triggered emails, nurture stream, sales sequences and others. Working with the content team, designers and campaign manager, they develop emails, CTAs and landing pages designed to increase engagement among existing leads, prospects and customers. They are responsible for maintaining the proper cadence of email communication that will drive engagement while avoiding list fatigue. They track the performance of email campaigns and perform A/B tests on various components. They

are also responsible for maintaining the company's email reputation by adhering to email marketing best practices GDPR, and CAN-SPAM regulations.

Importance of Role: *Essential*

Web Developer - Front End

Whatever channel leads may come through, at one point or another their journey will lead them to the company website — the pivotal focus of the company's messaging. The Front End Web Developer develops and maintains web pages using content and media provided by the content and design teams. They need to be adept in HTML, CSS, JavaScript, jQuery, and similar front-end scripting languages and frameworks, and be familiar with graphic design applications like Photoshop and InDesign. They must have familiarity with Content Management Systems (CMS) such as WordPress, Joomla or Drupal. They will ensure all links and web functionality such as forms are functioning properly, and that all text and media content is correct. They also ensure all sites are responsive across all major web browsers and mobile devices.

Importance of Role: *Essential*

Web Developer - Back End

Behind the beautiful images and flowing marketese on the website lies a complex set of web applications based on the CMS. The Back End Web Developer is responsible for managing the plumbing of the website, including ensuring that all plugins or components of the CMS are functioning as expected, maintaining the web server and Domain Name Service (DNS), deploying tracking tags from 3rd party apps such as the MAP, web analytics, etc., doing database queries or updates on website data and integrating 3rd party applications. This role will interface with the Front End Web Developer as well as the Marketing Automation and Marketing Operations.

Importance of Role: *Important (Could be handled by Marketing Operations Manager)*

Quality Assurance Specialist

While every member of the team will no doubt do their best to maintain high quality output, it is inevitable that errors will occur. The Quality Assurance Specialist is a cross-functional role that serves as a backup for various other team members. Their duties include reviewing all content just prior to publishing, including web content, emails, blog posts and social posts. They also test form submissions, website navigation and functionality, marketing automation workflows and more. Their job is to be the last line of defense against any mistakes and to apply the last bit of polish to every marketing message.

Importance of Role: *Important*

Analytics Manager

The job of the Analytics Manager is to explore the various types of analytics — web analytics, email delivery analytics, social media metrics, MAP funnel metrics, etc. — to discover insights about how marketing efforts could be improved, and to provide reporting that makes those opportunities apparent to the rest of the team.

The Analytics Manager will produce periodic reports on all demand generation activity and maintain dashboards that surface KPIs. They will also produce distilled lists of the most significant findings and recommendations for how they can be used to improve performance.

This role serves various other roles such as the SEM Manager, SEO Specialist, Email Marketing Manager and Social Media Manager.

Importance of Role: *Important*

Channel Marketing Manager

Possibly the best way to get our marketing message out is through promotion from many value-added resellers (VARs), consultants and bloggers who are established in the industry and/or are actively trying to expand their own marketing activities. The Channel Marketing Manager will research, pursue and nurture relationships with key influencers and companies that want to participate in cooperative marketing activities such as link exchanges, guest blog posts, co-branded ad campaigns, joint webinars, podcasts, etc.

Importance of Role: *Optional*

Creative Director:

A subtle but critical aspect of the Demand Generation team is the visual representation of the company brand on the website, ads, emails and all other marketing collateral. The Creative Director is responsible for ensuring the look-and-feel of all marketing material represents the company as intended and is free of defect.

They focus on things like whether visual elements are encroaching on the logo, that icon colors exactly match the hex number of the established accent color, and that the left and right margins around a form are the exact same number of pixels. This person is adept at Photoshop, Illustrator, InDesign and other graphics apps, but they don't spend too much time working in them as they are focused on developing the standards and leaving the creation of the actual images to their designers.

Importance of Role: *Important*

Graphic Designer

The Graphic Designer reports to the Creative Director and is the person tasked with producing all the imagery required by the rest of the marketing team. They live in PhotoShop and InDesign, producing web site hero shots and banners, display ads, social media memes, icons, diagrams, etc. as well as working in other apps to produce things like Powerpoint templates, data sheet and white paper templates, etc. They are also responsible for organizing and maintaining the growing repository of digital assets so that they are always accessible for future reference.

Importance of Role: *Essential*

Events Coordinator

Live industry events produce some of the best quality leads, so this role is a crucial part of the Demand Generation team, though they are somewhat of an outlier since their channel is essentially non-digital. They are responsible for promoting the participation of the company in trade shows with the objectives of driving traffic to the booth and lead scans at the booth.

They are responsible for maintaining the conference calendar, managing the logistics of booth shipping and setup, registration and travel arrangements, coordinating both assignments, marketing collateral at the booth and lead capture mechanisms. They will work closely with the Marketing Automation Manager and/or the Marketing Operations Manager to ensure all leads from events are properly captured and attributed in the MAP.

Importance of Role: *Essential*

Marketing Coordinator

The job title of Marketing Coordinator has been used loosely to refer to various aspects of other roles described here. In our context, the Marketing Coordinator will support the activities of the entire marketing team by developing systems and processes to facilitate efficient communication, knowledge capture and information sharing.

A primary responsibility is ensuring the Marketing Team Collaboration Platform is up to date and that all team members adhere to standards and practices within this environment. This person will also provide support services to other personnel such as the Campaigns Manager, Content Marketing Manager, etc. to handle administrative and lower-level bulk tasks.

Importance of Role: *Important*

Selling the Dream (Team)

You've done your homework, and you nod, satisfied. Four "Optional" roles, four "Important" roles and twelve "Essential" roles. That seems reasonable. So you take a deep breath, walk into your boss's office and sit across from her amidst several still unpacked boxes. After some chit chat about the travails of life in a startup, you take the initiative.

"So if you'll open that doc I sent, you'll see the Marketing Dream Team I've assembled for—"

"Well, let me stop you right there", your boss reluctantly interrupts. "It seems that our situation has changed recently. Apparently one of the VCs has backed out of the deal and about half of the company's funding just evaporated into thin air."

"So that thing about letting our mission and objectives determine the budget....?" you query.

"Yeah, that's out the window, too", she winces. "And our Dream Team is going to be smaller."

You sigh. Too good to be true...

"So what's the head count then?"

"Six".

"Ouch. Only six more people?"

"No. Six. Counting us."

Pregnant pause...

"Welcome to Reality."

You stagger back to your cubicle and gaze at your list for a while. Sure, you knew you'd probably have to collapse a few of those roles. But squeezing 20 roles into five? How can you build a demand generation machine with such a skeleton crew?

It sounds like an impossible task. Yet you know people in SMB B2B companies serving in multiple roles are pulling off these miracles every single day. And you know you can, too.

The purpose of this book is to show you how you can make your marketing team an agile, lean, lead generation machine — even on a tight budget and a limited team, as it almost always is In Real Life (IRL). This book was written for marketing professionals who are working for startup or SMB businesses in the B2B marketing sector, and those who aspire to do so.

But this book is not like other books you might read about B2B Demand Generation. This is not a recitation of all the established marketing best practices, as if they even actually existed. This book is about doing demand generation in the real world, where circumstances force you to prioritize which best practices you will follow and which ones you'll overlook for now — on a daily basis. As a demand generation marketer in a fast-paced small business, you are constantly faced with the need to declare “close enough” and move on to the next task.

More importantly, this book will help you gain the perspective to identify the most important issues and opportunities amidst all the moving parts of a modern demand generation system. You'll discover that the soft skill of being able to separate the signal from the noise — to see the forest as well as the trees — is one of the most important capabilities you need to cultivate to be an effective demand gen professional.

But just like any other book on demand generation, the ultimate purpose of this book is not just to make you aware of these things, but to help you squeeze the most quality leads you possibly can out of your marketing funnel.

It just turns out that the way to optimize lead production is not by strictly adhering to every marketing best practice, but by having a global awareness of the whole demand generation process and being clear about what priorities you need to focus on.

This book will not only help you to boost your productivity as a demand generation professional, but it will help you raise your coworkers' games as well. And again, you will find that the key to working effectively as a team is not so much about having the team with the deepest knowledge about marketing tools and processes, but about how well you communicate, coordinate and collaborate with each other.

The truth is that skills like setting up A/B tests for emails with a Marketing Automation tool, installing plugins in WordPress or producing graphics in the optimal dimensions for social media can all be learned fairly easily by someone with a solid background in marketing and digital technology. It seems that the really tricky part is being able to see the big picture as well as the fine details simultaneously, and communicating clearly about these with your teammates.

It isn't that marketing best practices are not useful or important. They definitely are. It's just that you need to keep these theoretical best practices in perspective, along with all the other factors, both subtle and obvious, that affect your demand generation program execution.

This book will give you the spherical awareness of the entire demand generation process — including the obvious elements such as the tools, roles, and best practices, but also more subtle aspects such as communication, organization and motivation — so that you can generate more and better leads for your company while enhancing your career. Not in theory, but in Real Life.

Written by: [Dane Christensen](#)