



# THE B2B STARTUP MARKETING PLAYBOOK

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How To Build A Revenue-Generating B2B  
Marketing Machine in 2025

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# WELCOME



**Hello and thank you for downloading the B2B Startup Marketing Playbook 2025. In this playbook, we want to outline some of the plays that have brought us the best results over the past 15 years.**

We will cover foundational activities such as positioning, vision, marketing essentials, and team-building before going onto fine-tuning the marketing machine, metrics, and, ultimately, finding your fastball and taking your company to the next level in terms of revenue and growth.

We hope you find value in this playbook - we have tried to balance strategic decision-making considerations with more actionable tips that can be implemented quickly for those much sought after quick wins.

B2B Marketing is changing as is the SaaS landscape, but opportunities remain and the goal - to build and grow your company in a meaningful way - stays the same. We wish you well on your journey and if you have any feedback or would like to book a 30 minute consultation, feel free to [reach out any time](#).

# FOUNDATIONS

Even the best marketing plans will fail if the foundations are not there. There is no marketing activity on the planet that will override a mispositioned product. To get those solid foundations nailed down, there are a few key components to consider. To begin, ask yourself the following questions:

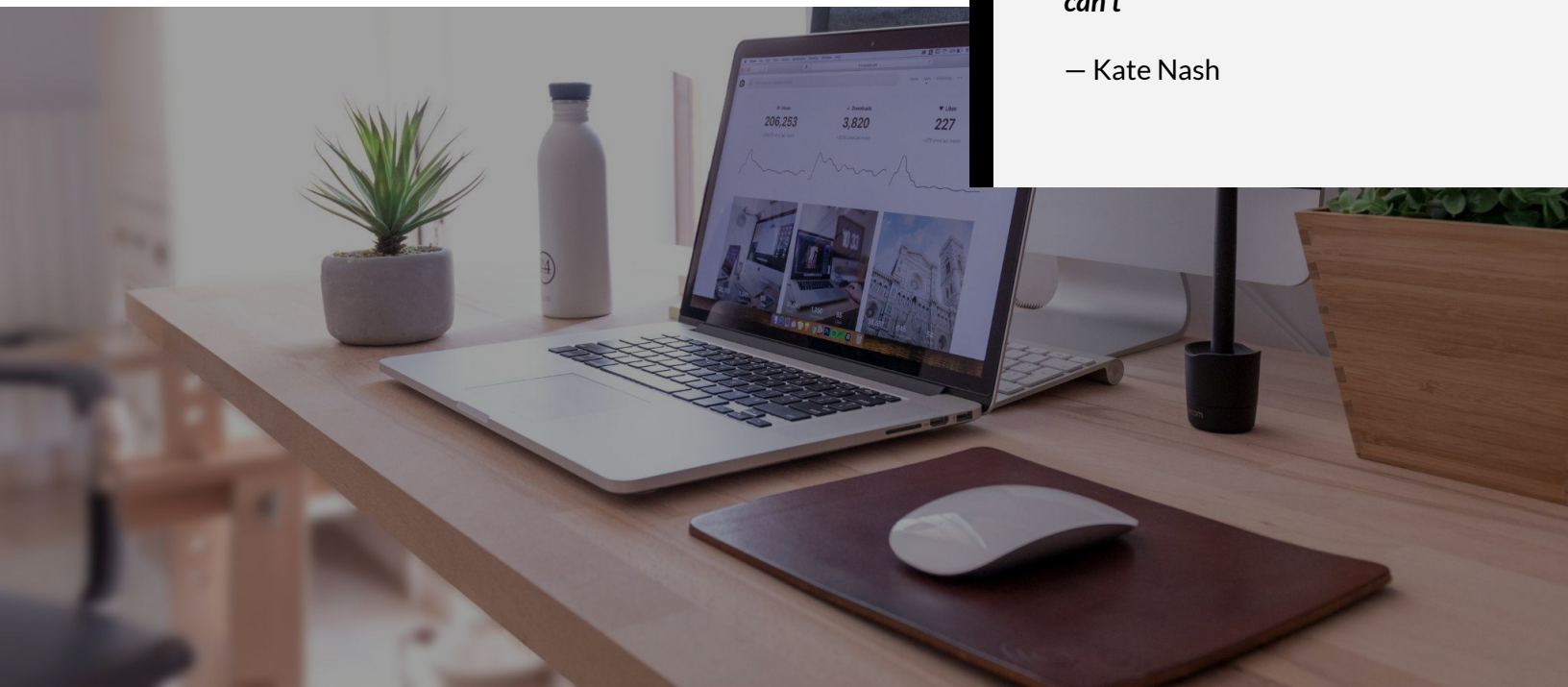
- What does your company stand for?
- What problem or problems does your product solve?
- What is your target industry?
- What does your ideal customer look like - what is their job title, what are their top priorities, and are you able to articulate their pain points?
- What software category is your product in?
- Who are your competitors and how do you stack up against each one?
- What are the triggers or events that make your product interesting (e.g. “just raised funding” or “hiring SDRs”)?
- What does your ideal customer journey look like?

These questions are fundamentals. No two ways about it. Before you go any further, you should be able to answer the above questions confidently and succinctly. If you can't, you might need to spend a bit more time on what is basically a planning and setup phase. The foundations are non-negotiable and any weaknesses here will quickly become apparent during active campaigns and sales conversations.

One thing to keep in mind here however is that unlike a house, the foundations need not be set in stone. We have seen some hugely successful companies make surprising pivots that ultimately transformed their company. The other thing to bear in mind is that market feedback is hugely valuable and can help you make important tweaks that help you refine your positioning and value proposition.

*“My fingertips are holding onto  
The cracks in our foundation  
And I know that I should let go but I  
can't”*

– Kate Nash





## EXERCISE 1

### **Nobody said there was going to be homework!**

Fear not, this resource is simply a guide that is there to be used as you see fit. This is your journey, you are the master of your destiny.

We have accompanied each section with an activity that we feel will be of benefit to you on your quest to develop a revenue-generating marketing machine. The activities laid out in this document are those we have used in the past that we have seen the best results from. The theory behind these exercises is to move this resource from a passive guide into a more valuable active learning accompaniment. Best practices have their place, but, ultimately, it is you who holds the key to your success.

**Exercise 1 is simple - set yourself a 90 second timer and ask yourself what does your company stand for.** This - in our opinion - is the key foundational question. Once there is clarity of purpose and the company mission is clear, everything else can fall into place. Without this clarity, problems will emerge down the line. The most meticulously prepared marketing campaigns will not get the results you hope for without a foundational purpose to build on.

Note that the time limit is important. If you can't answer this question satisfactorily within 90 seconds, then you are not where you need to be. This clarity of purpose is something you need to bring with you to the office each day. The other foundational questions we have posed can be attacked in due course, and some - like competitive research - can take days rather than seconds to complete, but, for now, let's get that company mission to a place where it is clear, believable, attainable, and easy to articulate.



# VISION

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*“Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion.”*

— Jack Welch

Once you are crystal clear on your company mission it is time to move onto your company vision. You are moving from the current state and why you do what you do to an idealized future. What is the desired future state of your company and, importantly, how do you get there?

The reason we have dedicated some of this playbook to foundational activities - such as establishing the company mission and articulating your vision - is because these ideals will inform everything that you do. Every single marketing or business development campaign you run needs a solid foundation. The tactics and tools will vary, but the premise can not. Foundational failure equals campaign failure every time.

The question for you as a company leader is - can you articulate your vision in a way that is ambitious, believable, strategic, and concise?



## Your vision should be bold.

Staying still is not an option. A company that is not ambitious and moving forward is one that will struggle.



## The vision must be believable.

Remember, this vision will inform everything you do in your company. You need a vision that your team will believe in and carry around with them through their day to day activities.



## Be strategic.

Your vision must be distilled to contain only the most strategic, even lofty aims. Don't get too granular.



## Aim for brevity.

To quote Blaise Pascal: *“If I had more time, I would have written you a shorter letter”*. Anything beyond two sentences is probably too long. Work on getting your vision written down, shorten it, and, once you are happy with it, shorten it again.



## EXERCISE 2

### More homework!

Don't worry - we will keep it brief. Exercise 2 is about crafting your vision statement. If you already have a vision statement, you can simply check in with your existing statement by reading it aloud and making the decision that it is ok or it needs to be updated.

If you need to update your vision statement or create one, you can follow these steps:

1. Record a 45 second video where you outline your vision for the future of your company. Remember, it should be bold, believable, and focused on high level strategic goals. Initially - unless you are a wordsmith of the highest order - you do not need to keep it particularly brief and you can use the full 45 seconds.
2. Use an AI companion tool to transcript your video. You will most likely end up with an around 15 sentences about your company.
3. Edit and distill this vision statement to max 3 sentences.
4. Communicate this vision with key personnel in your company. As a marketing leader, you will oversee all customer-facing materials - but this vision is something that must get company-wide adoption. From the SDR generating meetings, to the CEO speaking in public about the company - it is this vision that your company must strive towards in unison.

# COMPETITIVE POSITIONING

The final foundational section concerns competitive positioning. In SaaS today, you need to nail your niche. By this point, you know what your target customer looks like, you know what your company stands for, and you know where you want to go - but, you need to consider how your company or product stacks up against existing products in the market.



Such is the pace of change in business today, that you must also try and incorporate an element of clairvoyance into your market analysis and plot potential future developments within your space and how it might impact your company. The key questions to consider around competitive positioning are:

- What existing software market does your company or product lie in?
- If there is not an existing market - do you want to try and create your own market in the way that HubSpot so successfully did with “inbound marketing” and marketing automation software?
- Who are the main competitors in this market?
- What differentiates your company or product from your competitors?
- Does your solution have the established set of core capabilities that customers would expect from companies in your target space?

Once you are clear on these questions, you can begin plotting your go to market approach. How you see yourself within a particular software ecosystem or space will inform much of your marketing content. For instance, are you running a bootstrapped upstart of a software solution looking to come in and take risks to get some eyes on your product? Or, are you an established player in your space looking to build on an established reputation for excellence? These 2 positions can result in wildly different marketing approaches.

For now, the key for you is to understand exactly where you lie within your particular software market. A secondary concern is the future of the market itself and it is worth weighing up what threats lay down the line or if traditionally separate markets will converge as we so often see in SaaS.

Finally, it is worth remembering that competitive analysis is not a one-off task. The pace of change in SaaS means that competition will evolve and you must too.

*"The competitor to be feared is one who never bothers about you at all, but goes on making his own business better all the time."*

— Henry Ford



## EXERCISE 3

**“All work is easy work” or so goes the mantra of former world champion boxer Floyd Mayweather.**

Again, there is nothing in this playbook that is overly time-consuming. These exercises are meant mainly as a check-in with yourself and can help you identify areas where you might need to focus as you build up your marketing efforts.

This exercise takes 5 minutes total. Work through the 5 questions below taking 30 seconds to answer each and a 30 second break in between. If you can answer satisfactorily within the allotted time, then you are where you need to be. If the answers aren't at the front of your mind, then you might need to take a deeper look into this area. For this exercise, you can use a pen and paper, a computer, or record yourself speaking. Once the 5 minutes is up review what you have done and assess where you are at. Is what you have answered realistic? Do you believe in what you are saying? And, if so, what are the next steps to topple these competitors?

The questions:

- What existing software market is your company or product situated in?
- If there is not an existing market - do you want to try and create your own market in the way that HubSpot so successfully did with “inbound marketing” and marketing automation software?
- Who are the main competitors in this market?
- What differentiates your company or product from your competitors?
- Does your solution have the established set of core capabilities that customers would expect from companies in your target space?

# ESSENTIALS

Having achieved clarity around your vision, goals, target customers, and competitors, it is time for you to set up some of the basics. At the very least you will need a website, social media accounts, and some kind of CRM system to house your customer data. In time, you will need to build your tech stack far beyond a CRM - but, with these basics in place, you will have enough to kickstart your initial marketing and sales campaigns.

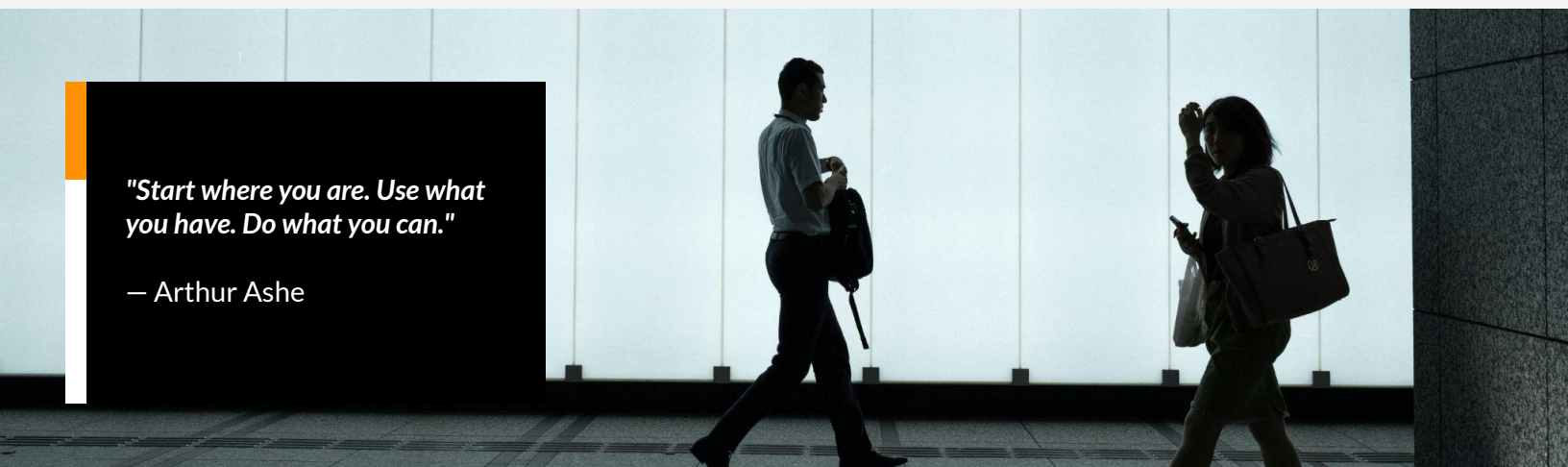
When it comes to websites, the most popular option would be Wordpress which comes with the bonus of easy-to-implement themes, plugins, and integrations with other tools such as HubSpot, Google Analytics etc. In terms of a CRM, Salesforce and HubSpot are both market-leading options. There are free alternatives out there as well which may well be enough for your initial setup. Setting up social media accounts is straightforward - but remember it is important to maintain consistency across your web presence. Ensure your website, socials, etc. are all on brand in terms of colors, fonts, and messaging.

You might want to consider a brand kit at this juncture as well where you select which colors and fonts will best represent your company. If you are not already set on a logo, you will need to figure that out at this point as well. You can hire a designer if you do not have anyone in-house. Alternatively, you could look

online at the various logo-maker tools available and see if anything tickles your fancy. s that competition will evolve and you must too.

These setup items are your bare minimum requirements and you can think about them as setting out your stall before you attack the market. If, as is the case for many early stage companies, resources are tight - then, it is no harm to think along the lines of minimum acceptable standards here.

The ultimate goal here is validating your product by making sales and growing revenue. Get your company basics set up in a way that is polished and highly professional, but do not waste too much time discussing colors and hex codes with highly skilled team members whose time could be better spent elsewhere. Growing revenue is the business you want your company to be in - keep your eyes on the prize.



*"Start where you are. Use what you have. Do what you can."*

— Arthur Ashe

# CHANNEL MIX

With your digital essentials in place, it is time to set up the various marketing channels you will need. To begin with, let's consider all the possible channels you will have at your disposal.



**Search Engine Optimization (SEO):** Building up your website to rank organically on Google and other search engines for keywords related to your industry.



**Pay-Per-Click Advertising (PPC):** Pay for ads on Google or social media sites to get your company in front of the right people.  
**Email Marketing:** If you can build up a list of suitable people and job roles at target companies, then email marketing can be a way to get your company front of mind. Within email marketing there are different areas to consider such as awareness building, thought leadership, or straight up prospecting where you are trying to get your target person onto a meeting with your sales team.



**Content Marketing:** The area of content marketing can dovetail with your SEO strategy, but content marketing goes beyond SEO to cover aspects like thought leadership, video, case studies, sell sheets, and sales enablement content - those pieces of content sales teams need to get deals over the line. An example might be a ROI document or comparison chart with key competitors.



**Events:** Depending on your target market, sometimes traditional channels like events can be more effective than the digital route. There may be a good deal of expense associated with some events, so you will need to weigh up numbers like average deal size etc. to figure out if events and conferences are worth the investment.



**Direct Mail:** Another possibly underutilized channel to consider is direct mail. There is lots of online noise, and sometimes target customers might be easier to reach by going old school!



**Print Ads:** Again this option would be another more traditional option than the digital channels, but can help you escape some of the noise online. Keep ROI considerations front and central here though. Can you find out about the companies and job titles a print ad would get in front of. What would a good ROI look like and do you have a way to prove or demonstrate ROI on any print spend?



**Cold Calling:** Not for the faint-hearted, cold calling can however produce the results. Things to consider here are contact info availability and the resources you have at your disposal. Do you have a junior team member in your sales organization that is looking to get in at the bottom and work their way up? Cold calling left in the hands of a capable, personable, and ambitious team member can help you make the initial connection with target decision makers.



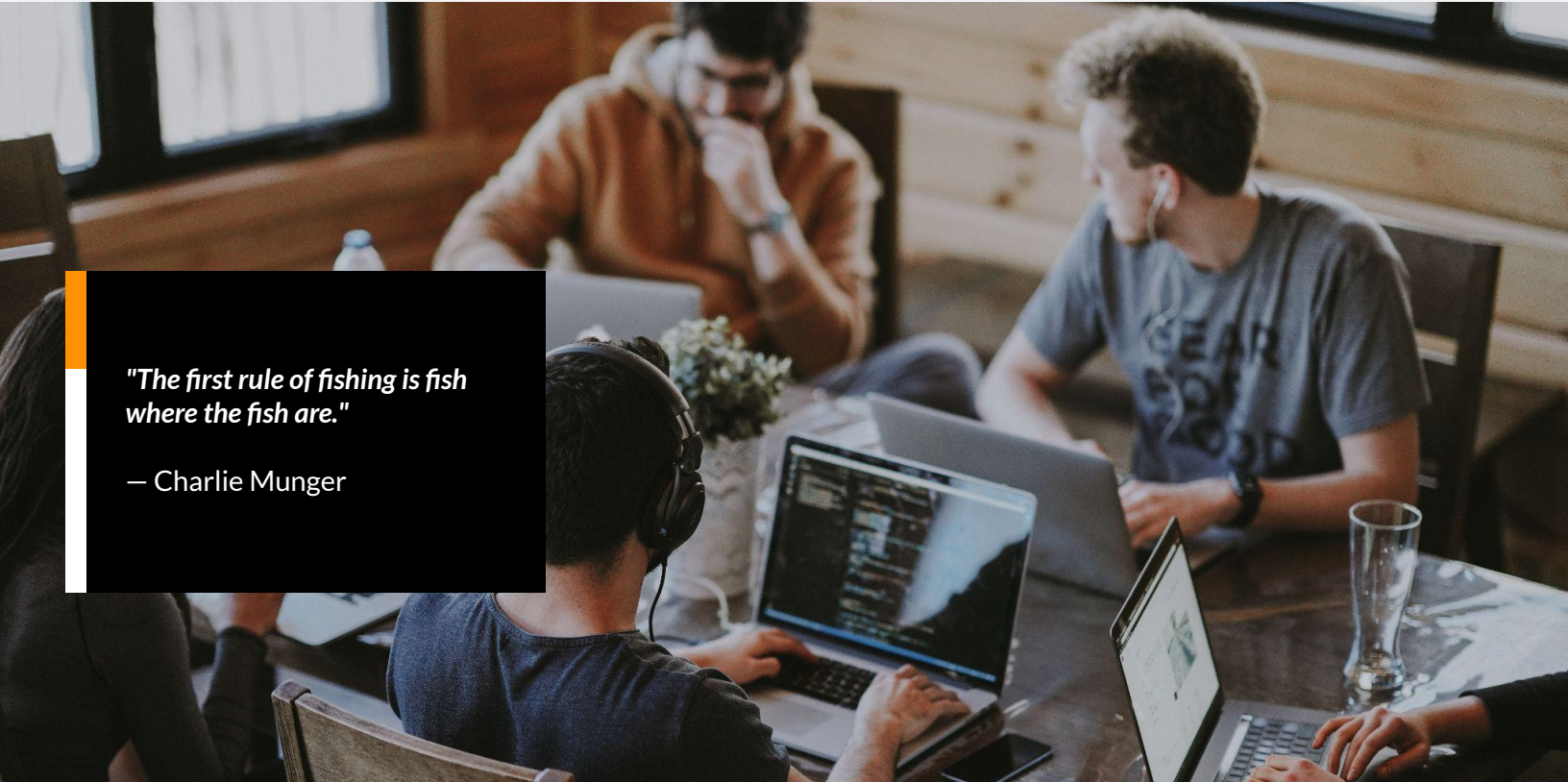
**PR:** In the early stages of a company, PR can have a major impact. There are various ways to work a PR component into your initial marketing strategy including working with PR agencies or hiring a full-time PR person if your budget allows. There are other ways too including building up one of your executives as a thought leader in your space and putting them forward for media appearances etc.



**Partner Marketing:** A really great partnership can be the making of a company. In many ways, partnerships and the type of partnership options available to you will be tied in with the makeup of your product. In a situation where a technical decision is made to integrate with an established platform, that can open up many marketing possibilities for you. You can also leverage the brand power and name recognition associated with an established platform. There are other possibilities here too around online marketplaces like the Salesforce AppExchange and others.



**Podcasts and Webinars:** Another channel at your disposal will be webinars and/or podcasts. Once again, this channel has grown incredibly crowded over the past decade or so, but it can still be valuable particularly if you are targeting a niche audience. There are a number of things to consider here - for starters you could simply try to put someone forward from your own company to appear on established podcasts. Alternatively, you could try and host your own and leverage existing customer relationships to appear on your own webinar or podcast. Possible guests may be interested in appearing as a means of building their own brand be it personal or company. This social proof can be invaluable as you look to attract and convince new customers of your product's value.



*"The first rule of fishing is fish where the fish are."*

— Charlie Munger



## EXERCISE 4

In this section we have covered the main marketing channels available to you. The task for you is to figure out which channels are best suited to your current situation. There are a number of key questions to consider as you weigh up which channels to invest your marketing budget, time, and focus.

- Where do your target customers hangout online?
- Is your target customer reachable online or do you need to incorporate a mix of traditional channels like events or print ads?
- What is your average deal size?
- What is the cost of a marketing campaign in relation to your average annual deal size?
- What are the key components you would need to launch an initial marketing campaign?
- What would a healthy ROI on a marketing campaign look like?
- How would you measure ROI?

The exercise, once again, is to simply work through these questions allowing yourself 30 seconds for each answer. If you can not answer satisfactorily, you can mark the question as an area you might need to invest some time in - time that could be spent on either research, planning, or even trying out a pilot campaign in a given area to test out some real world results.

These exercises should not themselves be seen as a time investment, instead they can be used as a tool to help you figure out where to invest your time as you build up a highly effective marketing machine.

# FINDING YOUR FASTBALL


Following on from setting up your various marketing channels and small bets - what is the feedback in your monthly retro meetings? Where are your closed won deals coming from? Sometimes it can be an oversimplification to credit one channel in particular as the source of a deal as it can often be a situation where a lead might come across your product on a variety of channels before they themselves decide to post an inbound enquiry. However, setting an original lead source contact field on your CRM is well worth doing and can give you important - if not complete - insight into a successful buyer's journey.

You will find your fastball by tracking and analyzing the various metrics available for each channel. In the sea of modern day marketing metrics, remember you need to identify the signal from the noise. At the end of the day, revenue is the key metric. Find out what activities are linked to the most revenue and you won't be long identifying your fastball.

Every company is unique and there are a number of considerations to weigh up as you strive to find your marketing fastball or - as the case may be - fastballs. Consider the resources you have available to you in terms of both budget and personnel. Other factors will include things like average deal size, average sales cycle time, and the makeup of your target audience. For example, if you are marketing a self-signup SaaS product with relatively low deal size, but minimal or no complexity involved in the sales process - then it might not make much sense for you to be shelling out precious budgetary resources to attend expensive industry conferences. In this example, focusing on your inbound marketing efforts, building up conversions, and finessing the self-signup process should be a higher priority for you and inbound marketing may ultimately be the fastball that drives revenue growth at your company.

On the other hand, if you are targeting enterprise sales deals with 6 figure + annual returns, then it might make sense for you to attend industry events and conferences as you look to build relationships with key decision makers at your target companies.

Finding that fastball is probably more of a priority for startup companies than larger enterprise companies with greater resources - however, there is still a lot that can be gained by understanding what channel or tactic is responsible for the most revenue generated and will ultimately help you decide where to spend your marketing budget.



*"To succeed in baseball, as in life, you must make adjustments."*

— Ken Griffey Jr.



## EXERCISE 5

The first four exercises in this guide are designed to be quick and used in such a way that they will help you identify areas that might need work. Unfortunately, this exercise is something of a departure in that it can not be completed over the time it takes you to make and enjoy a cup of coffee! However - the time investment you are willing to make is up to yourself and the specifics of the task are also up to you.

The mission - if you choose to accept it - is to spend some time on a revenue attribution project. The goal is to figure out which activities are bringing the most revenue into your company so you can double-down on these activities and *find your marketing fastball*.

The exact specifics of any revenue attribution project will vary by company, but there are some key factors to keep in mind:

- **CRM Insights** - Look into key CRM contact properties associated with winning deals such as original lead source, contact website journey, length of sales cycle, etc. The goal here is to identify commonalities in both closed won and closed lost deals. Data analysis skills can be important here to extract relevant reports, but you will also need to apply some critical analysis skills to interpret the data.
- **Acquisition Cost** - Weigh up the acquisition costs of successful leads. There are varying models you can adopt here, but multi-touch attribution is often the most suitable for the modern buyer's journey.
- **Sales Feedback** - This feedback may or may not exist on your CRM - but it is absolutely vital. Your sales team are the ones who are actively engaged with customers and they will have invaluable insights on areas like lead quality per source, customer objections, and commonalities in winning deals.
- **Winning Content** - Is there a case study, web page, or other piece of content that can be linked to closed won opportunities? Look into past meeting notes to find out.

# METRICS

We live in the age of metrics. - the modern b2b marketing leader is inundated with them. On the one hand, the widespread availability of data sources can provide invaluable insights into customer behavior, however, such is the breadth of metrics and data points available to the modern marketing team, that there is a danger of losing focus on what really matters.

Data and metrics are valuable, but if you can't interpret them with a clear focus on driving revenue growth, you're simply wasting your time. At the end of the day, the ultimate metric against which any marketing leader will be judged is revenue. While Sales teams are mostly associated with revenue-related metrics, more and more we are seeing Marketing teams take on revenue responsibility. As a general rule of thumb, it is advisable to make sure that any metrics you prioritize - you do so in a way that you can connect to revenue.

All that being said, you do need to develop a deep understanding of both your revenue attribution model and also your marketing and sales funnel, and there are some key metrics to focus on. In terms of your marketing funnel, it is important to understand the following:

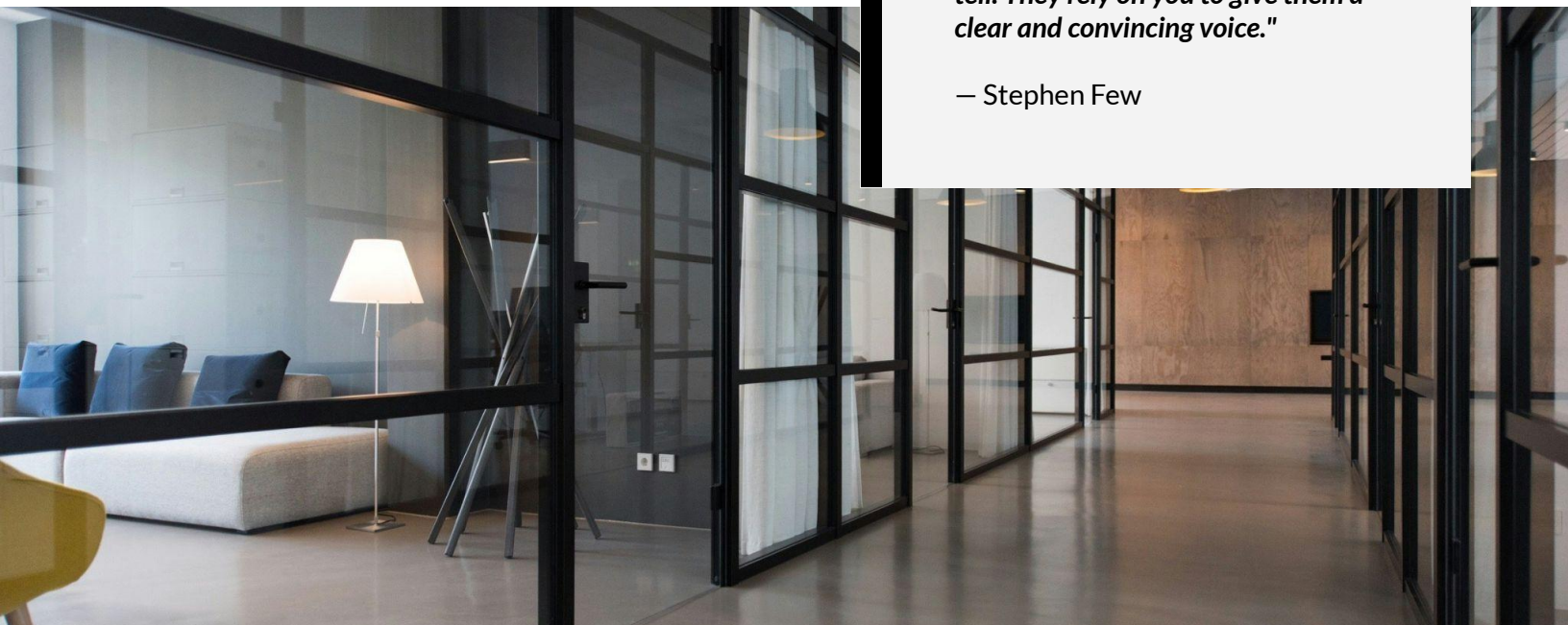


## Awareness

- Impressions: The number of views a web page or marketing asset received.
- Clicks: The number of clicks on a marketing asset e.g. email action button, web page CTA, etc.
- Total traffic: The total number of users directed to a website, landing page, or other digital platform.

*"Numbers have an important story to tell. They rely on you to give them a clear and convincing voice."*

– Stephen Few





## Consideration

- Total leads: Visitors who complete a conversion action.
- Traffic-to-lead conversion rate: The percentage of visitors who become leads.
- Cost per lead: Marketing spend divided by total leads generated.
- Marketing Qualified Leads (MQLs): Leads vetted by marketing as strong prospects.
- Cost per MQL: Marketing spend divided by the number of MQLs.



## Decision

- Sales Qualified Leads (SQLs) and Cost per SQL: Leads approved by sales and the cost to acquire them.
- MQL-to-SQL conversion rate: Percentage of MQLs that move forward as SQLs.
- Total closed/won deals: Marketing-driven opportunities that result in closed sales.
- Cost per acquisition (CPA): Total marketing spend divided by the number of new customers.
- Marketing-attributed revenue: Revenue generated directly from marketing efforts.
- Marketing ROI: Marketing-attributed revenue divided by total marketing costs.
- Return on Ad Spend (ROAS): Revenue from advertising divided by ad spend.
- Customer Lifetime Value (CLV): Average revenue a customer generates over their full relationship with the business.

Remember, it is a combination of the critical thinking capabilities you have honed over your marketing career combined with a level of comfort with data analytics that will help you get the most out of the various metrics available to you and your team. **Revenue is your true focus**, and learning from the various data points available about the ways you can grow revenue should be your priority. Impressions and click throughs will do little to impress the c-suite and board level operators who think only in terms of revenue. These metrics may however help you identify what is and isn't working across each marketing campaign and provide important insights that can be used to grow revenue.



# BUILDING YOUR TEAM



*“Talent wins games but teamwork and intelligence wins championships.”*

— Michael Jordan

As a B2B marketing leader, one of the most important steps in your journey will be the team-building and hiring stage. For smaller startup companies, it makes sense to focus on hiring generalists who possess broad skill sets and the learn-on-the-job mindset required to contribute in a fast-paced - and often bootstrapped - startup environment. The candidates that will most suit an early-stage B2B startup company are those that have demonstrable self-taught skills and a willingness to apply this mindset to whatever task is required. Ideally, these early marketing hires would possess the following mix of skills:

- Revenue-focus - early marketing hires can't lose sight of the big picture and will need to link in closely with business development and sales teams to ensure campaigns are not being run in isolation.
- Agile mindset - Undoubtedly the most important trait for an early stage marketing hire. A rapidly growing startup will require a wide range of activities from early hires. Activities will include a variation of content development, sales support, identifying and creating case studies, SEO, reporting, CPC and social media ads, event support, and maybe even event attendance. And, remember, things can change at any moment and team members can be pulled into high priority projects at the drop of a hat.
- Deep understanding of SaaS technologies, markets, and ecosystems
- Proficiencies in HTML and CSS. Anything beyond that is bonus territory.
- Familiarity with key systems such as CRMs, marketing automation systems, CMS, and Adobe Suite or equivalent.

When it boils down to it, there are a number of key questions to keep in mind as you weigh up your early stage recruitment options.

1. Does this person believe in the company's vision?
2. Does this person have the energy and adaptability for the task at hand?
3. Will this person help the company execute its vision?

Recruitment is not a box-ticking exercise - it is ultimately about finding people who will go on - and contribute to - the journey ahead.



# THANK YOU

Finally, we would like to thank you once again for downloading our guide and we hope you find some value in it. We have purposely kept it high level for the most part. The key strategic areas we focused on are - we feel - the most important areas to get right during the early stages of your startup journey.

The next stage for you is going to come down to tactical warfare and figuring out and honing the tactics and campaigns that are the best fit for your company. With a strong foundation in place, you will be well prepared to execute. Just remember to stay agile and be prepared to switch your focus as you need to - agility can be an enormous advantage over larger competitors.

As you roll out your various tactics and marketing campaigns, feel free to reach out if you require some extra guidance. At MFS, we have many years of experience in the B2B space and we are happy to jump on a no obligation consultation at any time. At any rate, we wish you well on your journey.



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