

The CMO's guide to

Modern Marketing

Modern marketers are creative, curious, experimental, willing to fail, and obsessed with data and tech.

They work best in or with a C-suite with the same ethos.



Introduction

Making sense of modern marketing

One of marketing's most important missions is creating a consistent, predictable, attributable pipeline to drive sales.

But the demand gen playbooks that worked even two or three years ago no longer deliver the results companies need.

Email inboxes are overwhelmed by spam, so marketers turn to advertising. But an increase in channels, a proliferation of social media sites (TikTok, YouTube, Reddit, Quora, Facebook, LinkedIn, X etc) and the introduction of generative AI makes it hard for an average marketer to keep up.

With all of these different channels, variables, and rules, how do you create a single version of attribution truth the leadership team all accepts and trusts?

Forging a new path

There is no school for B2B marketers. There is no standard blueprint for demand generation.

There shouldn't be.

Many marketers are afraid to experiment and put their necks on the line because of a company culture that will punish failures. Others naturally fear change or unpredictability, or just don't know what to do.

But the fact is that the only way through uncharted territory is experimentation. There is no one-size fits all approach. It's what makes marketing so fun, so challenging, so demanding, and so frustrating. It's why those of us that do it can stay engaged for a lifetime.

The making of a modern marketer

There is a small group of elite marketers who have fun with the chaos and consistently generate sourced pipeline more efficiently every year. Here are some things they have in common:

1 Curious, innovative, independent personalities

The modern marketer doesn't care what everyone else is doing. They're free thinkers who design their own funnels, attribution models, and campaigns that have never been done before.

2 Willingness to experiment

Modern marketers are hungry for innovation and love experimenting. They leverage a perfect blend of art and science: creative campaigns that actually work for the unique matrix of their current product, market, environment, and buyers' needs in a way that yields maximum pipeline and ROI.

3 Obsession with data

Modern marketers look at data as the lifeblood of their decision-making process. They demote vanity metrics (i.e. impressions, open rates) and focus on the same KPIs their c-suite and board executives are tracking (ARR, NRR, pipeline, CAC, LTV).

4 Focus on their true buyers

Modern marketers hone in on their TRM (total relevant market) and ICP (Ideal Customer Profile). They avoid the pitfall of boiling the ocean by going after the whole TAM (total addressable market) with too few resources.

5 Use technology as a competitive advantage

Modern marketers leverage new technologies, data sources, channels, and generative AI to reimagine what's possible. They love to learn and are excited rather than overwhelmed by new possibilities.

6 Optimization is a way of life

Modern marketers run demand gen strategies that relentlessly segment, personalize, and optimize based on data...even when things are going well! They're always trying to improve.

Modern marketing maturity assessment

In summary, modern marketers are creative, curious, experimental, willing to fail, and obsessed with data and tech. They understand that the **business of marketing** (company strategy, P&L, NRR) must inform **marketing the business** (campaigns and activities).

Use the following Modern Marketing Maturity frameworks to assess:

- ✓ Are you a modern **marketer?** (psychology, leadership style, organizational role)
- ✓ Is your **company** supporting modern approaches? (culture, technology, alignment)
- ✓ Is your marketing **strategy** modern? (measurement, targeting, messaging, channels, and motions)

Data-driven companies are:

19x

more likely to stay profitable

23x

more likely to top competitors in customer acquisition

7x

more likely to retain customers

Source: McKinsey

Are you a modern marketer?

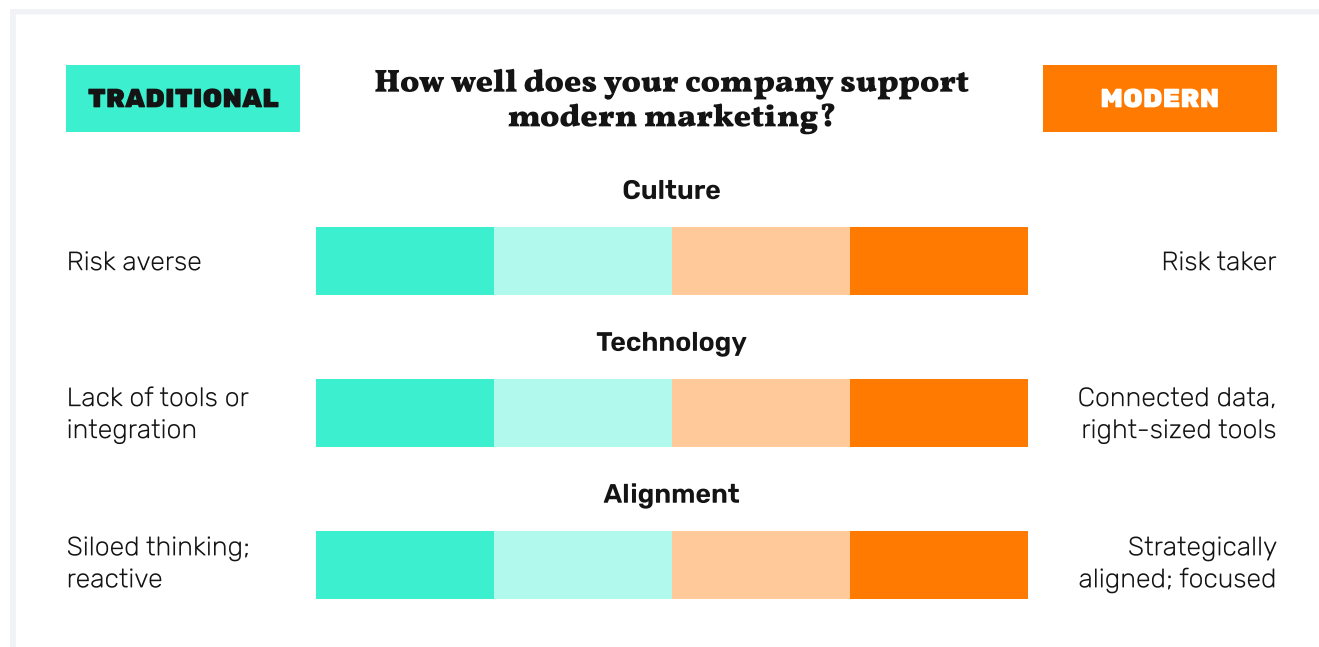
Assess yourself.



TRADITIONAL	MODERN
Focuses on following established processes & predefined norms	Innovates and experiments constantly. Ensures data is actionable. Adapts to market changes
Thinks linearly (5x results = 5x cost)	Audits results and constantly optimizes
Wary of emerging technologies and trends	Creates a culture of continuous learning. Supports their teams trying new things, taking risks, and failing forward.
Afraid to challenge authority (e.g., CEO or "experts")	Advises CMO, CEO & CRO in a strategic capacity
Focuses on tactics - no strategic oversight	Makes decisions independently with faith and confidence of leaders
Tracks vanity metrics - unaware of board level KPIs	Supports their teams trying new things, taking risks, and failing forward
Copy/pastes someone else's playbook	Resists silos and encourages cross-functional collaboration
Ignores data insights, missing out on opportunities for optimization and innovation	Evangelizes for marketing as a profit driver

Can your company support demand gen?

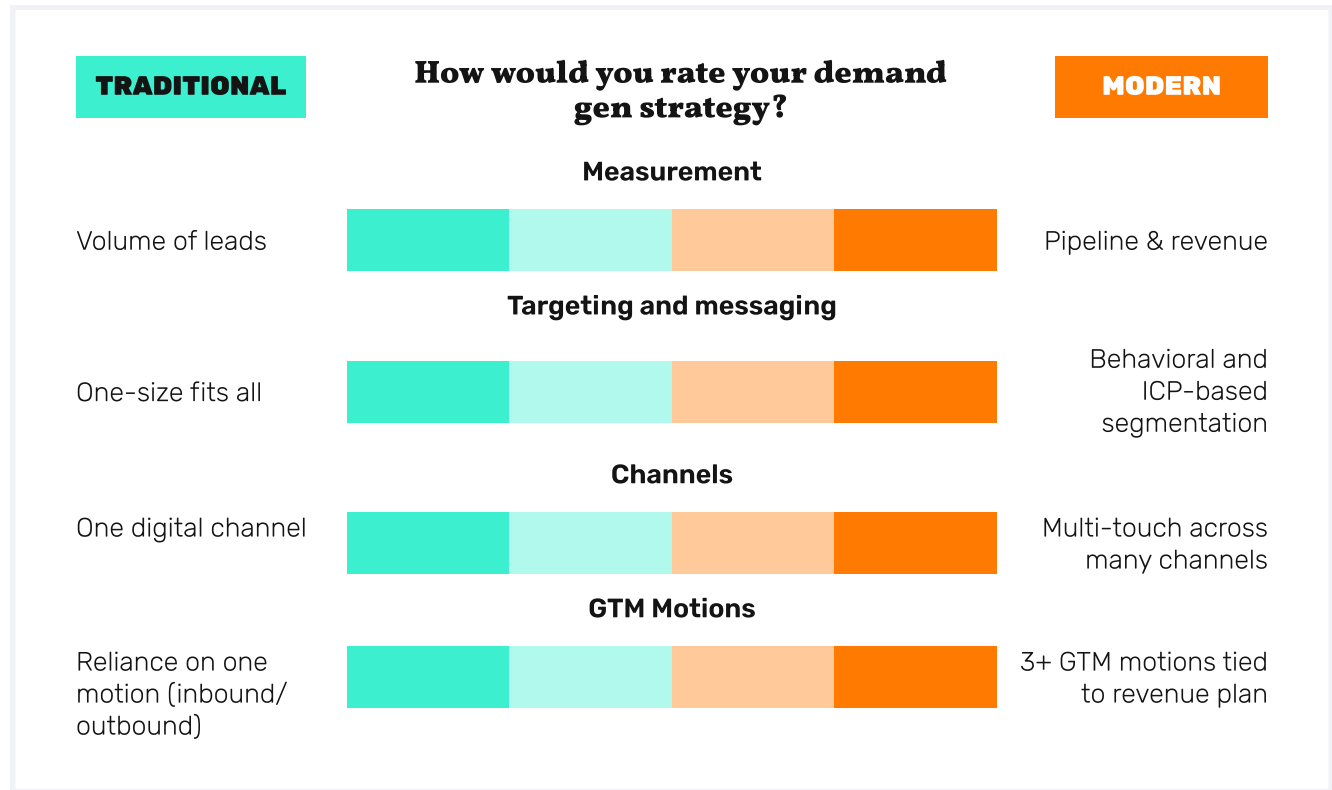
Assess your company.



TRADITIONAL	MODERN
Hires talent who follows instructions	Hires talent who questions status quo
Creates an ICP in a silo with a weak feedback loop with sales and CS	Funds experiments without knowing the outcomes
Orients towards tasks vs. outcomes. Uses analytics and data discovery in a limited way	Discourages fighting around pipeline credit (everyone wins or loses together)
Rewards vanity metrics (impressions, clicks, reach, opens, attendees)	Defines and refines TAM, TRM & ICP collaboratively with sales, CS, and product
Competes with sales on pipeline credit	Welcomes a CFO audit of ROI and P&L
Spreads themselves too thin and lack focus. Has multiple silos within GTM tech stack	Runs GTM motions tied to strategy (no random campaigns)
Suffer from poor communication and transparency to overall organization	Tracks board level KPI's (e.g. pipeline by stage, CAC, CLTV, ARR)
Afraid of CFO getting involved in the numbers. Get no support from RevOps	Learns from failure by digging at root causes (poor creative, bad CTA, lack of sales follow up)

Is your demand gen strategy modern?

Assess your strategy.



TRADITIONAL	MODERN
Celebrates quantity of leads sent to sales	Strives for high intent, high conversion, ICP-based leads
Emphasizes the top of the funnel only	Drives engagement in named account lists
Uses a rudimentary qualification process and little or no lead scoring	Supports leads throughout the whole funnel
Deploys unsophisticated nurture campaigns	Creates sophisticated multi channel nurture programs with proven conversion
Targets only with broad characteristics (e.g. # employees, industry, revenue)	Leverages A/B testing and optimization to maximize performance and ROI
Delivers random brand-level or topic-level content	Executes GTM Motions in coordination with sales & revops to deliver on revenue plans
Adapts slowly to changing marketing conditions or customer preference	Iterates and improves constantly
Relies on long-term, fixed marketing plans	Adapts quickly to market shifts

Modern Marketers

Thanks and appreciation to all the modern marketers who lent their expertise to framing this report.

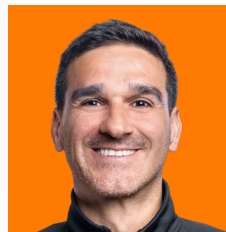
“When you really understand who customers are and what they care about, it’s much easier to get creative. That’s the bridge between the art and the science of marketing: data feeds innovation.”



James Gilbert

VP of Demand Gen,
Bloomerang

“There is no tech in the world that can make demand gen effective if you don’t have experimental people constantly changing ads, images, creative, and messaging based on data.”



**Carlos Mario
Tobon Camacho**

Director of Demand
Generation, Eightfold

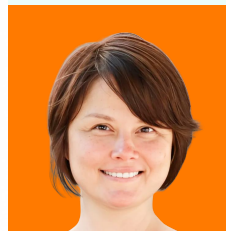
“Your north star always has to be revenue. Other metrics may help you optimize and iterate, but at the end of the day, the demand gen team has to prove its contribution to NRR.”



Corrina Owens

Chief Evangelist,
Purple Cork

“You don’t want sales and marketing fighting over credit for a lead. Attribution works when it shows us what is and isn’t working, and not when it’s focused on who should get credit.”



Julija Noskova

Head of North American
Marketing, Pigment

"The top 1% marketers are experimental, they have no sacred cows, they optimize for board-level goals such as revenue and CAC, and they always have hard data to prove what is working and what isn't."



Gil Allouche

CEO, Metadata.io

"Sales, marketing, product and customer success all have to be on the same page when it comes to TRM and ICP. Otherwise, you'll see sales bringing in accounts that are likely to churn."



Jen Leaver

Senior Director of Demand Gen + ABM, CloudBolt Software

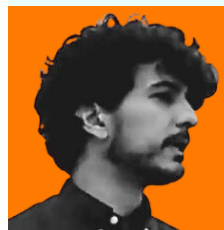
"Marketers really need to be Swiss army knives with expertise across many marketing disciplines in order to be successful."



Josh Carter

Director of Demand Generation, Pavilion

"Evergreen is a dirty word when it comes to marketing. It implies we aren't testing, iterating, optimizing, and constantly improving."



Adi Hagag

GM, MetaMatch by Metadata

“I am always asking myself and my team, ‘how do we continue to do cool stuff and what can we learn?’ Optimization is a word that wouldn’t exist if everything worked out perfectly the first time. We have to be here for the ride, not just the destination.”



**Kanika
Mirchandani**

Digital Marketing Manager
of Demand Generation,
Own

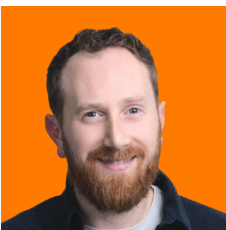
“Don’t be afraid to buck best practices and try new channels. Doing so will allow you to move faster than conventional wisdom allows.”



Rowan Tonkin

CMO, Planful

“Given the incredible array of tools and technologies, there is no excuse for relying on manual processes in the modern era.”



Roy Naar

Head of Strategic
Marketing, Atera

“Modern demand gen is not a support function that simply follows orders. It’s a strategic function that serves in an advisory capacity.”

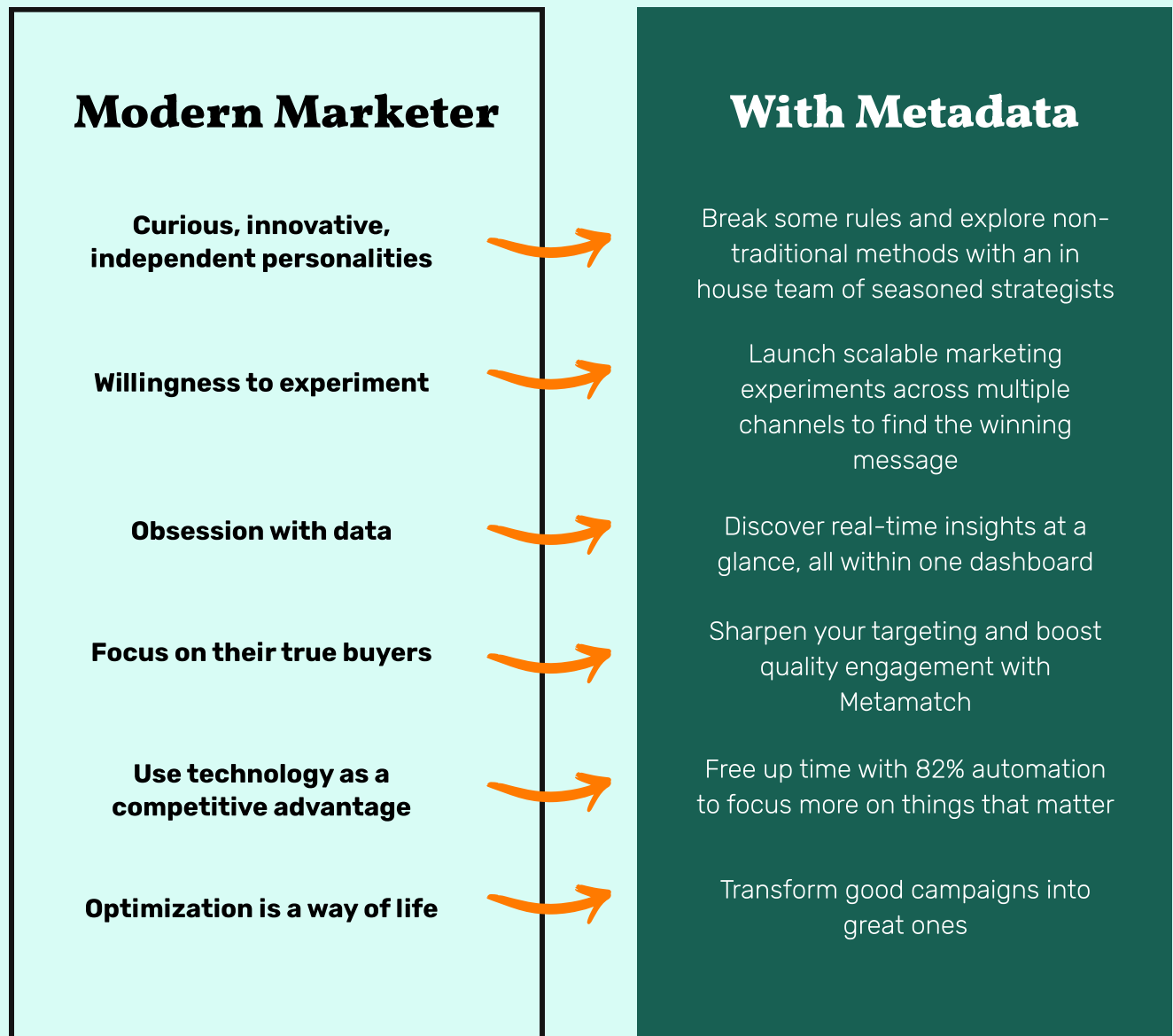


Tim Hillison

Founder and CEO,
Entrypoint1

The making of a modern marketer

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The Analysts



Bryan Brown

Cofounder, Chief Analyst

Bryan is a SaaS pioneer and thought leader in the marketing and sales tech industry. He has both created and brought to market innovative software products and ideas while helping thousands of companies in their effort to grow revenue more efficiently.

Bryan is a co-founder with multiple exits (Vtrenz), has led strategy teams in Fortune 100 Companies (IBM) and has helped multiple organizations scale their products and Go-to-Market approaches from point solutions to platforms (Silverpop, Terminus).



Lindsay Cordell

Senior GTM Analyst

Lindsay is a practitioner turned analyst who studies best practices and trends in Go-to-Market and develops actionable models and blueprints for our clients.

She has held both practitioner and leadership roles in almost every aspect of Go-to-Market, including Product, Marketing, Sales, RevOps, and Enablement in Fortune 500 companies including AT&T, Hearst and Cox. She most recently ran the GTM Center of Excellence for the Account-Based Marketing Platform Solution Terminus.



Sarah Allen-Short

GTM Analyst

Sarah brings more than 20 years of experience of B2B marketing and sales leadership to her role as a GTM analyst.

She's worked in technology, nonprofit, government, and higher education, with a specialty in B2B SaaS. She excels at taking the skills and experience she developed working with Fortune 500's and billion-dollar companies and helping startups and scaleups apply those lessons in practical, agile ways.

Sarah specializes in combining strategic and tactical approaches for maximum impact.



Sangram Vajre

Cofounder, Industry Analyst

Sangram is a three-time best-selling author and co-founder of several organizations, including Terminus, The Peak Community and most recently, GTM Partners.

Sangram has been at the forefront of B2B marketing trends, the Flip-my-Funnel movement, and defining the Account-Based Marketing category ushering in a new generation of marketers.

He has previously held CMO roles at Pardot, a Salesforce company and Terminus.

About Metadata

 metadata.io

Metadata is the first operating system for B2B marketers.

Through AI and machine learning, Metadata frees B2B marketers from mundane and repetitive tasks so they can spend more time on the work that matters most: strategy, creativity, and driving more revenue.

B2B marketers at Zoom, Okta, and ThoughtSpot rely on Metadata to automate their campaigns and drive more revenue.

