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A PLAYBOOK FOR MARKETING DIRECTORS

Marketing that earns its place in the *boardroom*.

You own a pipeline number. Your exec wants the number, not the method. Five phases to fix the plumbing, turn the site into a sales tool, get found in Google and AI answers, and report figures that survive the board meeting.



FIVE PHASES

01 Diagnose
02 Fix the plumbing
03 Build the site as a sales tool
04 Be found in Google and AI answers
05 Prove it to the board

What's inside.

Each phase has a page on why it matters, the tables and templates to do it, and two things you can do this week.

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You own the number. You don't own the stack.

You run marketing for a B2B software or services company — a hundred to a few hundred people, often PE-backed or recently acquired. You have a pipeline target in the millions a quarter and a CEO, CRO or COO who wants the number and does not care how it's made.

You have a small team who are good at content, product marketing and brand. What nobody on the team runs is paid media, SEO, tracking or the CRM. And you're usually newly in seat, or newly under pressure, with a stack somebody else built.

WHAT YOU HAVE	WHAT'S MISSING
Strategy, positioning and messaging	Anyone who runs paid media or SEO
A brand people inside the company are proud of	Tracking that joins the ad click to the closed deal
Content and product marketing capacity	A site built to convert the right buyer
Ideas — comparison pages, campaigns, formats	Presence where buyers now ask: AI answers
A number you're accountable for	Reporting the exec accepts without caveats



FOUR TELLS

- Half your attribution reads "direct".
- Traffic is up; MQLs are at a multi-year low.
- Your buyers don't search your category by name.
- The last agency reported activity, not outcomes.

Traffic up. Pipeline *down.*

The symptoms look like a marketing problem. Most of them are a plumbing, positioning or measurement problem wearing a marketing costume. Find yours in the left column.

SYMPTOM	WHAT IT USUALLY MEANS	FIXED IN
Traffic has doubled. MQLs are at their lowest since 2021.	The traffic isn't buyers. Or buyers are arriving and the site gives them nowhere to go.	01 · 03
Half of attribution reads "direct" or "unknown".	Tracking is broken between the click, the form and the CRM. Nothing you report can be trusted until this is fixed.	02
Hundreds of form fills a month. A handful of real prospects.	Non-buyers — end users, patients, students, job seekers — are hitting your forms and teaching your ad platforms to find more of them.	02 · 03
Paid capture is softening quarter on quarter.	Your buyers don't search your category by name. They describe a problem, or they ask an AI. Search capture alone has a ceiling.	04
Directory and review-site leads have fallen off a cliff.	A rented channel changed the rules. You have no owned visibility to fall back on — in Google or in AI answers.	04
The agency report is 30 pages and the CEO calls it fluff.	Nobody agreed a baseline or the three numbers that matter. Activity is being reported because outcomes can't be.	05

THE PATTERN

Every one of these was diagnosed as a creative problem first. None of them was.

Five phases. One loop.

The order matters. Creative before plumbing wastes the creative. Visibility before the site wastes the traffic. Reporting before a baseline proves nothing.

01

Diagnose

Find out what's true before anyone proposes a campaign. Ten checks, a red-amber-green verdict, an order of work.

Output: a diagnostic you can show your exec, and a baseline.

02

Fix the plumbing

Tracking, consent, conversions, UTMs, CRM join, offline conversions back to the ad platforms. Filter the non-buyers out.

Output: every lead has a source; every source has a cost.

03

Build the site as a sales tool

Stop the trophy cabinet. Each page has one job, one buyer and one next step. Comparison and problem pages, not feature tours.

Output: a site that qualifies as well as it converts.

04

Be found

SEO for the problem language buyers use, and AEO — answer-engine optimisation — so you appear when they ask ChatGPT, Gemini or Google's AI.

Output: owned visibility you don't rent from a directory.

05

Prove it

A one-page board report against the baseline from phase one. Enquiries, demos, pipeline, cost per opportunity. Then run the loop again.

Output: numbers your exec repeats without caveats.

THE RULE

Baseline first. Nothing gets launched until the starting numbers are written down and agreed with the person above you.

PHASE 01

Diagnose.

Diagnosis before a pitch. Always.

WHY IT MATTERS

You inherited a stack, a site and a set of reports you didn't build. Somebody will want to launch something in your first month. Don't. Spend two weeks finding out what's actually true — which numbers can be trusted, which can't, and where buyers are falling out — and you'll have a plan your exec believes and a baseline to be judged against later.

WHAT'S IN THIS PHASE

- The ten-point diagnostic table
- A red-amber-green verdict per area
- A worked example and the order of work it produces
- The baseline sheet you'll report against in phase five



The ten-point diagnostic

Score each area red, amber or green. Red means the number can't be trusted or the buyer can't get through. Fix reds before anything else.

AREA	WHAT WE CHECK	RED FLAG	PHASE
Attribution	Source on every lead, from click to closed-won	More than 20% "direct" or "unknown"	02
Form quality	Who is actually filling in the forms	Under 1 in 5 submissions is a prospect	02
Traffic fit	Top landing pages against your ICP	Top pages serve end users, not buyers	03
Conversion path	Clicks from a core page to a demo request	Three or more clicks; CTA is "Contact us"	03
Search category	Does anyone search for what you call yourselves	Brand term is your only ranking keyword	04
AI presence	Ten buyer prompts across ChatGPT, Gemini, AI Overviews	Named in fewer than 3 of 10; competitor in 7+	04
Paid targeting	Spend by keyword and audience against ICP	Over a third of spend on generic or non-ICP terms	02
CRM handoff	Time from form to first sales touch; lifecycle stages used	Over 24 hours; stages skipped or blank	02
Reporting	What the exec sees, how often, and whether it ties to pipeline	Report leads with traffic, impressions or rankings	05
Content inventory	Pages by traffic, conversions and last update	Dozens of orphaned pages; no comparison pages	03 · 04

- **Red.** Numbers can't be trusted or buyers can't get through. Fix before launching anything.
- **Amber.** Working, leaking. Schedule it in the first 90 days.
- **Green.** Leave it alone and say so. Restraint is a finding too.

A worked example

THE SITUATION — ILLUSTRATIVE

Regulated software, 200 staff, four-person marketing team, new marketing director. Target: 40 MQLs a month, $5m quarterly pipeline. Traffic doubled in a year; MQLs at a multi-year low. The last agency reported keyword rankings.

AREA	FINDING	VERDICT
Form quality	239 submissions last month. 17 were prospects. The rest were end users of a customer's product looking for support.	Red
Attribution	48% of CRM leads read "direct". UTMs inconsistent across three people who write ads.	Red
Paid targeting	Broad-match terms brought 95% non-ICP traffic. The platform learned from the polluted forms and found more of the same.	Red
AI presence	Named in 2 of 10 buyer prompts. Two competitors named in 8. Blog converts well — leave it alone.	Amber

ORDER OF WORK IT PRODUCES

Weeks 1–2: route non-buyers off the demo form; fix UTMs and the CRM join; agree the baseline with the CRO. **Weeks 3–6:** rebuild paid on ICP terms with clean conversions. **Weeks 6–12:** AI-answer content.



USE IT TODAY

WAY 1 Export last month's form submissions. Tag each one buyer / not buyer by hand. It takes an hour and it's the most useful number you'll produce this quarter.

WAY 2 Type ten questions your buyer would ask into ChatGPT and Gemini. Count how often you're named versus each competitor. That's your AI baseline.

PHASE 02

Fix the plumbing.

Plumbing before creative. Every time.

WHY IT MATTERS

Half of "direct" attribution isn't a mystery — it's a missing tag, an inconsistent UTM, or a form that doesn't pass its source to the CRM. Until the click, the form and the closed deal are joined, every number you report has a caveat, and the ad platforms are learning from the wrong conversions. This is unglamorous work. It's also the work that makes everything after it measurable.

WHAT'S IN THIS PHASE

- The tracking stack — seven layers, what must be true at each
- Offline conversions back to the ad platforms
- The lead-quality filter — routing non-buyers away from your numbers
- A campaign-naming convention the whole team follows



The tracking stack

Seven layers. Work top to bottom — each depends on the one above. Name an owner for every row or it won't stay fixed.

LAYER	WHAT MUST BE TRUE	HOW TO CHECK	OWNER
1 · Tags & consent	One tag manager. Consent mode set up so you don't lose half your data to a cookie banner.	Tag assistant on five pages; compare analytics sessions to server logs	Marketing ops
2 · Analytics	Internal traffic, bots and customer logins excluded. One property, one set of definitions.	Filter report for your office IPs and the app subdomain	Marketing ops
3 · Conversions	Demo request, contact, call and content download tracked as separate events — not one "form submit".	Submit each form in test; see each land as its own event	Marketing ops
4 · UTMs	One naming convention, lower case, written down. Every paid, email and social link uses it.	Pull last 90 days of campaign names; count the variants of "LinkedIn"	Whoever writes ads
5 · CRM join	Original source, campaign and landing page land on the contact and the deal. Lifecycle stages actually used.	Open ten recent deals; can you see the first click on each?	Rev ops
6 · Offline conversions	SQL and closed-won sent back to Google and LinkedIn so they optimise for pipeline, not form fills.	Ad platform shows "qualified" conversions with a lag, not just leads	Paid media
7 · Dashboard	One view: source → lead → SQL → pipeline → cost. Refreshes itself. Same numbers the CRO sees.	Ask the CRO to read it back to you without your help	You

WHY LAYER 6 MATTERS

Ad platforms optimise toward whatever you call a conversion. Feed them form fills and they'll find you form-fillers. Feed them qualified opportunities and they'll go looking for buyers. It's the single biggest lever most B2B accounts never pull.

The lead-quality filter

Non-buyers aren't a nuisance — they're pollution. Every one that hits the demo form teaches your analytics and your ad platforms the wrong lesson. Give each type somewhere else to go.

WHO'S ARRIVING	HOW YOU'LL SPOT THEM	ROUTE THEM TO
End users of a customer	"I can't log in", "my appointment", personal email domains	A customer-support page, clearly linked from the header
Job seekers	CVs attached; "opportunities"; traffic from job boards	Careers page with its own form, excluded from conversions
Students & researchers	.edu / .ac.uk domains; "for my dissertation"	Resources hub; downloads tracked as content, not leads
Existing customers	Domain matches a CRM account	Login and support; auto-tagged, never counted as new
Vendors selling to you	"Partnership", "quick question", agencies	A partnerships form. Or nowhere.

EXAMPLE · ONE FORM FIELD

I am…

- Evaluating software for my team → **Sales**
- A user of a client's system → Support
- Interested in working here → Careers
- Something else → Inbox

Only the first option fires the conversion event. Everything else is routed, answered and kept out of your numbers.

USE IT TODAY

WAY 1 Add the "I am…" field to your main form this week. Only the buyer option counts as a conversion.

WAY 2 Write the UTM convention on one page and pin it in the team channel. Five fields, lower case, no exceptions.

PHASE 03

Build the site as a sales tool.

A trophy cabinet is not a sales tool.

WHY IT MATTERS

Most B2B software sites were built piecemeal to please the people inside the company. They list features, awards and a leadership team. A buyer with a problem arrives, can't tell in ten seconds whether this is for them, and leaves. A sales tool does the opposite: it names the buyer's problem in the buyer's words, shows who it's for and who it isn't, proves it, and offers one next step. It also quietly sends the wrong visitors elsewhere.

WHAT'S IN THIS PHASE

- Trophy cabinet versus sales tool — the comparison
- Page anatomy: the job, the must-haves and the metric for each core page
- The homepage blueprint, block by block
- Why comparison pages outperform feature tours



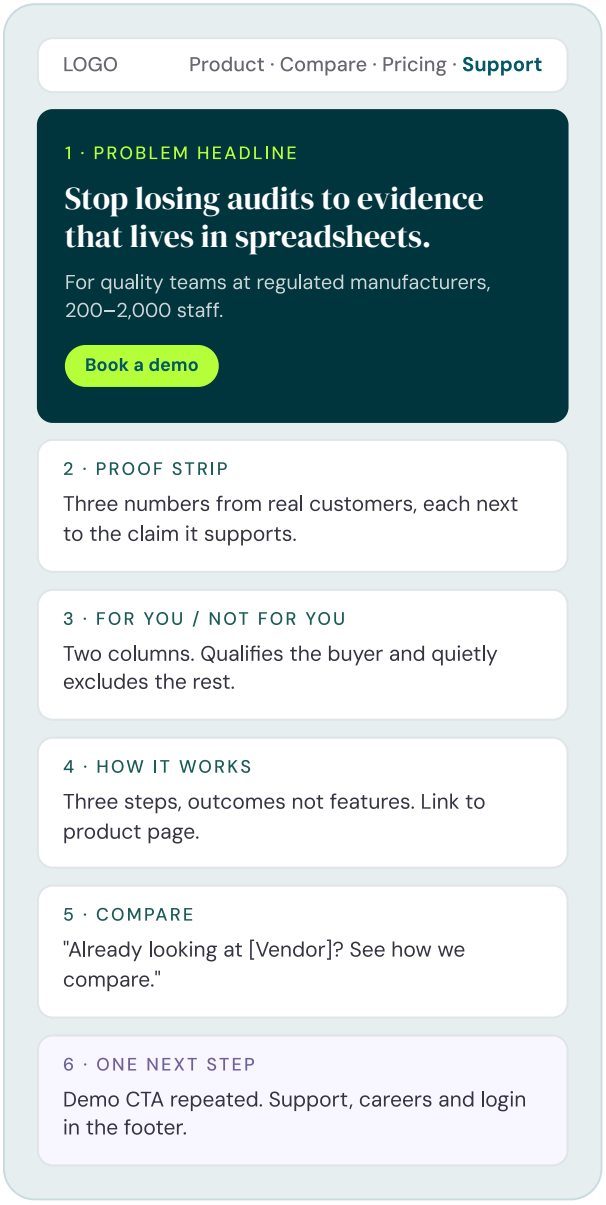
Trophy cabinet or sales tool?

TROPHY CABINET	SALES TOOL
Headline is what you call yourselves	Headline is the buyer's problem, in their words
Features listed; benefits implied	Outcomes with numbers; features on the product page
Awards, logos and "trusted by" above the fold	Proof next to the claim it supports
One "Contact us" button for everyone	"Book a demo" for buyers; support and careers routed away
Leadership team on the homepage	Who it's for — and who it isn't — stated plainly
Every visitor treated the same	Comparison pages for buyers who've shortlisted

Page anatomy

PAGE	ITS ONE JOB	MUST INCLUDE	ITS METRIC
Home	Tell the buyer they're in the right place in ten seconds	Problem headline · who it's for · three outcomes · one CTA · routes for non-buyers	Click-through to product or demo
Problem page	Rank for the way buyers describe the pain	The problem named · why it happens · what good looks like · how you fix it	Organic entrances → demo
Comparison	Win the shortlisted buyer — and get cited by AI	Honest feature matrix · who each is best for · pricing shape · FAQs · schema	Demo rate; AI citations
Pricing	Qualify out the wrong buyer before sales does	Pricing shape even if not the number · what drives cost · "typical customer" band	Demo requests that become SQLs
Case study	Prove it for a buyer who looks like this one	Where they started · what changed · the number · who to talk to	Assisted conversions
Demo	Convert without friction; filter without offence	Five fields · the "I am…" router · what happens next, with a time	Completion rate; time to first touch

The homepage, block by block



1 **Headline the problem, not the product**

Lift the words from your last ten discovery calls. If your CEO says it's not "on brand", that's usually a sign it's right.

2 **Proof beside the claim**

A logo wall proves you have customers. A number next to a claim proves the claim. Use the latter.

3 **Say who it isn't for**

"Not for teams under 50" costs you nothing you wanted and saves sales a dozen calls a month.

4 **Outcomes, then features**

The homepage sells the outcome. The product page sells the feature. Keep them apart.

5 **Name the competitor**

Shortlisted buyers are already comparing you. Give them the page or they'll get it from the competitor.

6 **One call to action**

Demo. Not "contact us", not "learn more". Everything else routes to the footer.

USE IT TODAY

WAY 1 Show your homepage to someone outside the company for ten seconds. Ask what you sell and who it's for. Write down what they say.

WAY 2 Write one comparison page against the competitor sales loses to most. Publish it before you redesign anything.

PHASE 04

Be found — in Google and in AI answers.

Buyers describe a problem. They don't search your category name.

WHY IT MATTERS

If your product sits in a category nobody searches for by name, keyword SEO has a low ceiling and paid capture will keep softening. Your buyers describe the problem — or, increasingly, ask ChatGPT, Gemini or Google's AI for "the best tools for..." and get a shortlist of five. If you're not on it, you're not in the deal. AEO is how you get on it: the same discipline as SEO, aimed at the pages AI engines cite.

WHAT'S IN THIS PHASE

- The translation table: what buyers say → search → ask an AI → page that wins
- The four formats AI answers cite
- SEO and AEO side by side — what's shared, what's different
- How to measure AI presence monthly



The translation table

Start from what the buyer says on a discovery call. Work right. The last column is the page you build. Examples are illustrative — fill in your own rows.

THE BUYER SAYS	THEY SEARCH	THEY ASK AN AI	PAGE THAT WINS
"We fail audits because the evidence lives in spreadsheets."	audit evidence software · compliance tracking tool	"Best tools to manage audit evidence for ISO 9001"	**Problem page + a listicle you appear in**
"New hires take six months to be useful."	reduce onboarding time · employee onboarding software	"How do companies cut ramp time for new hires?"	**Guide with a number in it + comparison**
"Approvals get stuck in email for weeks."	approval workflow software · [Big Vendor] alternatives	"Alternatives to [Big Vendor] for approval workflows"	**Comparison page, honest matrix**
"We can't prove which campaigns make revenue."	B2B marketing attribution · HubSpot attribution setup	"What's the best attribution setup for a HubSpot B2B team?"	**How-to with FAQs, structured data**
"There isn't really a name for what we do."	— nothing. That's the point.	"Top vendors for [the problem] in [sector]"	**Get cited in the lists the AI already reads**

What AI answers cite

Listicles
"Best X for Y" round-ups. Get on the ones that exist; publish your own, honestly.

Comparisons
"X vs Y" and "alternatives to X" with a real matrix. Engines love a table.

Definitions & FAQs
Short, quotable answers under a clear question heading, marked up as FAQ schema.

Original numbers
Benchmarks, surveys, your own data. Unique facts get cited; opinions don't.

SEO and AEO, side by side

	GOOGLE (SEO)	AI ANSWERS (AEO)
The goal	Rank on page one for problem-language keywords	Be named and cited in the shortlist the engine gives
Research	Keyword volume, difficulty, SERP intent	Ten buyer prompts, run monthly across ChatGPT, Gemini, AI Overviews, Perplexity
Content	Problem pages, guides, product pages	Listicles, comparisons, FAQs, original data — plus third-party mentions
Technical	Crawlability, speed, internal links, schema	Same — plus clear headings, quotable paragraphs, entity consistency across the web
Off-site	Links from relevant sites	Presence in review sites, directories and round-ups the engines already trust
The metric	Organic entrances that become demos	Share of prompts you're named in; demos citing "ChatGPT" as source

AI ANSWER · ILLUSTRATIVE

"Best audit evidence tools for ISO 9001 manufacturers?"

For mid-sized regulated manufacturers, the most-cited options are:

1. Competitor A — broad QMS suite
2. **You** — evidence-first, 200–2,000 staff [1][3]
3. Competitor B — enterprise

Sources: [1] your comparison page · [3] an industry round-up

Measure it like this. Ten prompts, four engines, once a month. Score: named / not named / competitor named. Report the share, not the screenshots.

USE IT TODAY

WAY 1 Add "How did you hear about us?" as a free-text field on the demo form. Within a month you'll know how many buyers say "ChatGPT".

WAY 2 Find the three round-ups the AI cites for your buyer's problem. Get listed in them before you write anything new.

PHASE 05

Prove it to the board.

Numbers that survive the meeting without you in the room.

WHY IT MATTERS

Your biggest fear isn't a bad month. It's not being able to explain one. A thirty-page agency deck full of impressions and rankings is activity, and your CEO can smell it. What survives a board meeting is one page: the three numbers you're judged on, against the baseline you agreed in phase one, with what changed and what you'll do next. Same page, every month, no caveats.

WHAT'S IN THIS PHASE

- The one-page board report, as a template
- Activity metrics versus outcome metrics — what to stop reporting
- The weekly, monthly and quarterly cadence
- How to embed the exec above you so the account outlives any one person



The one-page board report

Marketing → pipeline · [Month]

Baseline: [Month, year]

QUALIFIED ENQUIRIES / WK	DEMOS BOOKED / MONTH	PIPELINE CREATED
___	___	$___
Baseline __ · Target __	Baseline __ · Target __	Baseline $__ · Target $__

MQL → SQL RATE	COST PER OPPORTUNITY	AI-ANSWER SHARE
__%	$__	__ / 10

WHAT CHANGED, AND WHY

WHAT WE'RE DOING NEXT MONTH

WHERE THE NUMBER IS AT RISK

Same six boxes every month. Source data: CRM, not ad platforms. Anything not on this page goes in an appendix nobody has to read.

STOP REPORTING	REPORT
Impressions	Qualified enquiries
Sessions	Demos booked
Keyword rankings	MQL → SQL rate
Form fills	Pipeline created
Engagement rate	Cost per opportunity
Posts published	AI-answer share

Test. Hand the page to the CRO without commentary. If they can read it back to the CEO correctly, it's finished.

The cadence

Three rhythms, three audiences, three decisions. Each meeting ends with a decision or it's a status update, and status updates get cancelled.

RHYTHM	WHO'S IN IT	WHAT'S REVIEWED	THE DECISION
Weekly 30 min	You, paid media, SEO/AEO, marketing ops	Enquiries by source · anything broken in the stack · this week's launches against demand	What to pause, what to push, what to fix first
Monthly 45 min	You, your CRO or CEO, sales lead, agency lead	The one-page report against baseline · lead quality from sales' side · AI-answer share	Where next month's budget moves, and by how much
Quarterly 90 min	Exec team, you, agency	Pipeline created vs target · cost per opportunity trend · re-run the ten-point diagnostic	Continue, expand or stop each channel. Reset the baseline.



PROTECT YOURSELF

Marketing directors move jobs. Get your CRO or CEO into the monthly from month one, reading the same page you read. When the number is theirs as much as yours, the programme survives a reorganisation — and so does your reputation.

USE IT TODAY

WAY 1 Book the monthly with your exec now, for the next six months. Put the six boxes in the invite so they know what they'll see.

WAY 2 Ask sales to score last month's MQLs 1–3 for quality. Put the average on the report. It's the number that ends the "marketing sends rubbish" conversation.

Three problems. Three chains.

The phases aren't a menu. Start from the symptom you have and run the chain.

"Traffic has doubled and MQLs are at their lowest in years."

DIAGNOSE	Tag last month's form fills buyer / non-buyer. Check the top landing pages against ICP.
PLUMB	Route non-buyers off the demo form. Send only SQLs back to the ad platforms as conversions.
BUILD	Rewrite the homepage headline for the buyer; add "for you / not for you"; move support to the header.
PROVE	Report qualified enquiries, not form fills. Expect the top-line lead count to fall and the pipeline to rise.

→ Fewer leads. More pipeline. A CEO who stops asking about traffic.

"Nobody searches for what we do, and paid capture is drying up."

DIAGNOSE	Run the ten buyer prompts across four AI engines. Count who's named.
BUILD	Problem pages in the buyer's language. One comparison page against the vendor you lose to.
BE FOUND	Get into the round-ups the engines already cite. Publish the listicle and the FAQs. Shift paid to problem terms.
PROVE	Monthly AI-answer share on the report, next to demos citing "ChatGPT" as source.

→ Owned visibility that doesn't depend on a directory's algorithm or a keyword nobody types.

"The CEO calls marketing fluff and I can't prove otherwise."

DIAGNOSE	Agree the baseline — three numbers, this month — with the CEO in the room. Write it down.
PLUMB	Fix the CRM join so every deal shows its first click. Kill the "direct" bucket.
PROVE	One page, six boxes, monthly, in the CEO's diary. Stop sending the 30-page deck.

→ A number the CEO repeats in the board meeting — and attributes to you.

What the first quarter looks like.

Whether you run it with your team or with us, this is the shape. Each 30 days ends with a gate: a number that has to be true before the next block starts.

	DAYS 0–30	DAYS 31–60	DAYS 61–90
Diagnose	Ten-point diagnostic. Baseline agreed with exec. Buyer / non-buyer tagging.	Re-check reds weekly	Re-run the ten points for the quarterly
Plumb	Tags, consent, conversions, UTM convention, form router, CRM join.	Offline conversions live. Paid rebuilt on ICP terms with clean signals.	Dashboard self-serve for the CRO
Build	Homepage headline and CTA fixed. Support routed.	First comparison page. Demo page with router. Pricing shape published.	Problem pages live. Site rebuild scoped if needed.
Be found	AI-answer baseline: ten prompts, four engines.	Listed in the three round-ups that matter. FAQ and comparison schema live.	Listicle and original-data piece published. Second AI-answer read.
Prove	Board report template agreed. First monthly booked.	First report against baseline. Sales scores lead quality.	Quarterly: continue / expand / stop per channel.

GATE · DAY 30
Under 10% of leads read "direct". Buyer share of form fills known.

GATE · DAY 60
Qualified enquiries up on baseline. Cost per opportunity known.

GATE · DAY 90
Pipeline created vs target on one page the CEO has read.

We become the layer your team doesn't have.

Your content and product marketers stay. We run paid media, SEO and AEO, tracking and marketing ops — with reporting built for the person above you.

YOUR TEAM KEEPS	MUNRO RUNS
Strategy, positioning, brand	Paid media — search, LinkedIn, retargeting
Product marketing and launches	SEO and AEO — Google and AI answers
Content calendar and writing	Tracking, CRM plumbing, offline conversions
Sales enablement	Site build or rebuild as a sales tool
The relationship with your exec	The one-page report, monthly, against baseline

Diagnosis first
We run the ten-point diagnostic before we propose anything. If the answer is "your stack is fine, fix the site", we'll say so.

Senior people stay on it
The people in the pitch are the people on the account. Nobody hands you to a junior after month two.

We'll say no
If a keyword will bring 95% non-ICP traffic, we won't bid on it, however big the volume. You're paying for judgement, not activity.

Complex B2B is what we do
Regulated software, long cycles, products with no search category, US markets. We've done it for people in your seat.

Not a fit if you want a channel run without anyone touching tracking or follow-up, or you're measured on traffic and rankings rather than pipeline.


JENNY · MUNRO



WHAT TO DO NEXT

Start with the *diagnosis.*

We'll run the ten-point diagnostic on your stack, site and reporting, and tell you plainly where your pipeline is leaking — and what we'd fix first. If the answer is "not much", you'll hear that too.

Book a Pipeline Growth Plan. Bring your CRO.

Get your pipeline growth plan →

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