Winning in the Brand-to-Demand Zone™. A playbook for B2B growth.

How to focus investment, engage buyers “just in time,” win more and drive growth



Stein. | 6sense

Contents.

Executive summary 03

Part 1: Understanding the Brand-to-Demand Zone 05

- **Chapter 1:** The shifting B2B buyer journey 06
- **Chapter 2:** Rethinking the 95/5 rule and why it matters now 08
- **Chapter 3:** The Brand-to-Demand Zone defined 10

Part 2: Winning strategies in the B2D Zone 12

- **Chapter 4:** Out-of-market plays 13
- **Chapter 5:** In-market plays 14
- **Chapter 6:** Always-on brand activation 17

Part 3: Practical application and the Category-Brand Matrix 20

- **Chapter 7:** The BDX models in action 21
- **Chapter 8:** The Category-Brand Matrix 23

Part 4: B2D Zone maturity action plan 26

- **Chapter 9:** Where to start 27
- **Chapter 10:** Key takeaways and next steps 29

The B2D Readiness Checklist 31

Final takeaway 32

Appendix 33

Executive summary.

Through deep empirical analysis, the critical juncture where B2B buyers transition from passive market observers to active evaluators has been identified. With this comes invaluable new input to support strategies and drive higher-impact investment allocation. This juncture is called the Brand-to-Demand Zone™.

In this definitive playbook, you'll find the data and detail you need to leverage the Brand-to-Demand Zone as a strategic and tactical opportunity. Its authors — Marc Keating, Chief Innovation Officer at Stein, and Kerry Cunningham, Research and Thought Leadership, 6sense — have brought together Stein's expertise in unified brand-to-demand experiences (BDX™) with 6sense's deep understanding of buyer behavior, ABX and orchestration technology to unlock B2B's "zone of opportunity."

The problem

Why brands miss the B2D Zone

The B2B buying landscape has fundamentally shifted. New data from 6sense's analysis of over 19 million buyer interactions" should be "1,000 of its customers and the 19 million of their customer's ICP accounts reveals that the 95/5 rule, which states that on average only 5% of a B2B brand's potential customers are actively in market at a given point in time, tells only part of the story. The reality is more nuanced.

- More of your market is actively in market, with 34% exploring and evaluating and 6% ready to buy
- Buyers fill 80% of their shortlist on day 1 of their buying journey
- 90% of buyers purchase from the day 1 shortlist
- 95% of buyers pick a favorite vendor before engaging with sales
- 95% of buying group members have prior experience with vendors they evaluate
- 80% of buyers purchase from the pre-sales favorite

This creates a paradox: vendors must establish category fame and, in doing so, be memorable when buyers aren't actively in market — yet also be immediately relevant and inevitably shortlisted when they are in market. Many organizations fail this test because they're trapped in outdated go-to-market motions that treat brand and demand as separate disciplines.

The opportunity

What the data shows

Our research reveals that B2B organizations are significantly underinvesting in brand. According to the 2025 Brand-to-Demand Maturity Study developed by ANA and Stein, 80% of B2B organizations remain stuck in the bottom two maturity tiers, either severely underinvested in brand or operating with disconnected brand and demand silos. This misalignment comes at a high cost: buyers for the most part reject vendors they don't already know and trust. In fact, LinkedIn and Bain & Company research shows that being widely known in your target category is more important than being known by niche experts — with vendors 20x more likely to be bought from when known by the whole buying group compared to when recommended only by experts.

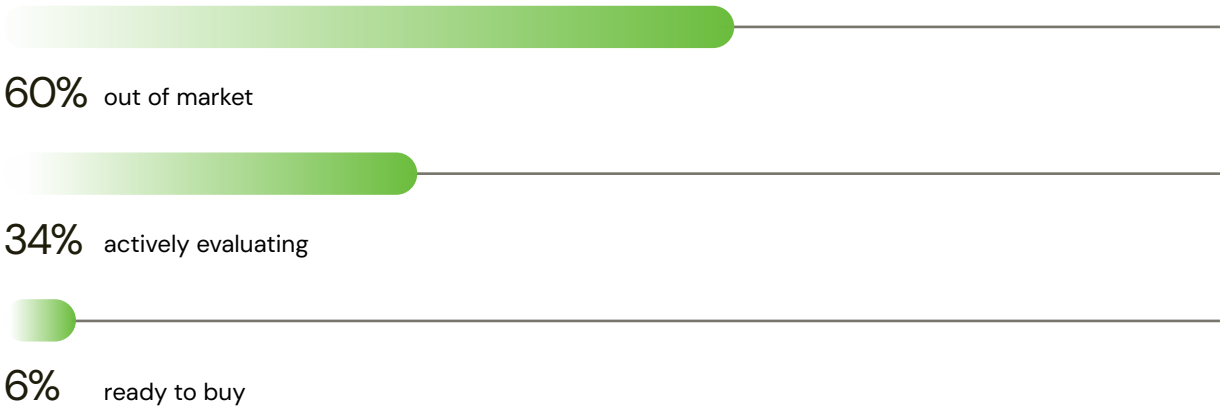
Core takeaway

Always-on, buyer-first strategies

Brands can lose deals on day 1 of the buying journey, before they know the opportunity exists — even when ultimately winning the deal is months or quarters into the future. Success in the B2D Zone (the critical transition space where buyers shift from being passive market participants to active evaluators) requires a fundamental shift from pure campaign-based thinking to incorporate always-on orchestration, from funnel stages to buying journeys. The new 6sense data reveals the true nuance: 60% of your target audience is out of market, 34% is actively exploring and evaluating (moving from awareness to consideration), and 6% are in late-stage decision and purchase modes.

Continuous presence required

This means brands must maintain a continuous presence across the entire journey; maintaining mental availability, category fame/relevance and memory structures with the 60%, engaging the active 34% to ensure shortlisting and converting the 6% to closed-won. Of note, this doesn't require investing more — it's about investing smarter through unified brand-to-demand strategies.



This playbook will empower you to:

- Understand the new 60/34/6 market reality
- Recognize and capitalize on the moments that trigger buyer entry into market
- Build brand memorability that translates to day 1 shortlist inclusion
- Build collective buying group confidence and prompt hidden buyer personas to say "yes"
- Orchestrate seamless experiences from brand awareness through demand capture through closed-won
- Align investment, messaging and measurement to leverage the B2D Zone
- Adapt strategies based on your brand's awareness and consideration levels, as well as your category maturity and fame

PART ONE:

Understanding the Brand-to-Demand Zone.

The new dynamics essential for any organization seeking to win today and into the future.

Chapter 1:

The shifting B2B buyer journey.

Today's B2B buyers navigate complex, non-linear paths shaped by digital accessibility, prior experience, peer influence and increasingly sophisticated research capabilities. Understanding these new dynamics is essential for any organization seeking to win today and into the future.

Traditional funnel vs. actual journeys

The traditional B2B funnel assumed a predictable progression:

awareness → consideration → decision → purchase

Buyers would engage with vendors sequentially, gathering information through controlled touchpoints. Sales teams guided much of the journey, qualifying leads and nurturing them through stages.

Even though buyers are still moving through these stages, the reality is radically different than a linear construct. Buyers conduct 70% of their research independently before contacting any vendor (6sense). They form opinions through prior experience, peer networks, online communities, digital content and now LLMs (large language models). Most critically, they create shortlists the moment they enter the market, not after weeks of vendor evaluation. They buy from these shortlists nearly all the time.

The semipermeable membrane

Think of the boundary between "in market" and "out of market" not as a wall but as a semipermeable membrane, where buyers constantly move between:

- **Active monitoring:** Staying current on industry trends
- **Passive absorption:** Encountering vendor messages while focused elsewhere
- **Triggered exploration:** Responding to business events that create urgency
- **Intentional research:** Actively investigating solutions

When buyers cross into the intentional research state, they put their prior experience and research to work immediately, forming shortlists from which the ultimate winner will come 95% of the time. Even when the purchase is months or quarters away, buyers make decisions that determine the ultimate outcome of the buying journey. These decisions are shaped by their prior experiences and by how they experience brands when they are not in market.

This means your brand must be present and relevant across all states, not just when buyers raise their hands.

The day 1 shortlist imperative

Here's the stark reality: if you're not on the shortlist when buyers enter the market, you have effectively no chance of winning. 6sense's data shows:

- **95% of purchases come from the day 1 shortlist**
- **Average day 1 shortlist contains just 3.3 vendors**

This is about more than being considered, it's about being pre-selected before the buying process formally begins.

Re-engaging past buyers

Equally important is the finding that 95% of buying group members have experience with one or more vendors they'll evaluate. This means:



Past customers carry memories (positive, neutral and negative) that shape the shortlists



Former evaluators who didn't buy still influence new decisions



Brand repositioning must overcome historical perceptions — removing old brand residue and recalibrating the brand with new messaging

Successful brands don't just attract new buyers; they continuously re-engage past and current ones with evolved positioning and renewed relevance.

The role of LLMs and AI

We already see that brands are losing web traffic to LLMs. But does that mean brands are also losing pipeline to LLMs? Not necessarily. It's true that 94% of buyers consult LLMs during the early stages of their buying journeys. They are using LLMs to collect and synthesize information on the brands they will evaluate. However, buyers are deeply experienced in established solution categories. On day 1, they know which vendors they'll evaluate, and they're still relying on those vendors and reliable third parties to help them inform or update their understanding of vendor offerings.

Crucially, much of what buyers experience of brands before they go into market and form shortlists happens via LLMs. During the years buyers spend between purchase cycles, they are much more likely now to keep up to date through LLM summaries rather than visits to individual vendor websites or even industry publications. If your content isn't structured for the LLMs to learn from it, they won't know about the new brand positioning you launch, updates to your product portfolio or the great new reviews you are getting from industry pundits — meaning your future prospects are likely not going to learn about them either. All of which has profound implications:

- Your brand must be accurately represented in training data
- Content must be structured for AI comprehension
- Thought leadership must address the questions AI tools surface

Brands invisible to LLMs risk being invisible to buyers. By building content and experiences for LLMs to learn from, you can help ensure your brand shows up when targets search, rather than competitors or outdated information.

The hidden buyer challenge

Another considerable challenge facing marketers are "hidden buyers" – such as legal, HR, finance and procurement stakeholders — who wield veto power but rarely appear in traditional marketing targeting. 6sense research shows:

- Hidden buyers reject 50% of shortlisted vendors
- They are 1.7x more influenced by brand reputation than their peers
- They prioritize risk mitigation over feature differentiation
- Vendors are 20x more likely to be bought when known by the whole buying group (Bain & Company)

These professional de-riskers don't care about your product's bells and whistles. They care about your financial stability, customer satisfaction scores and market reputation. This requires a shift in messaging to address the "fear of messing up" rather than the "fear of missing out" — which in turn requires content that provides defendable rationales for choosing the solution and shows how similar companies succeeded.

Buyability: The new B2B imperative

LinkedIn's concept of "Buyability" — as endorsed by Bain, WARC, Stein and many CMOs globally — synthesizes these dynamics into two essential rules:

01 **Get on your buyers' day 1 list** by being active and relevant in their categories

02 **Put advocacy at the heart of your strategy** so that recommendations, relationships and relatability maximize your purchase probability

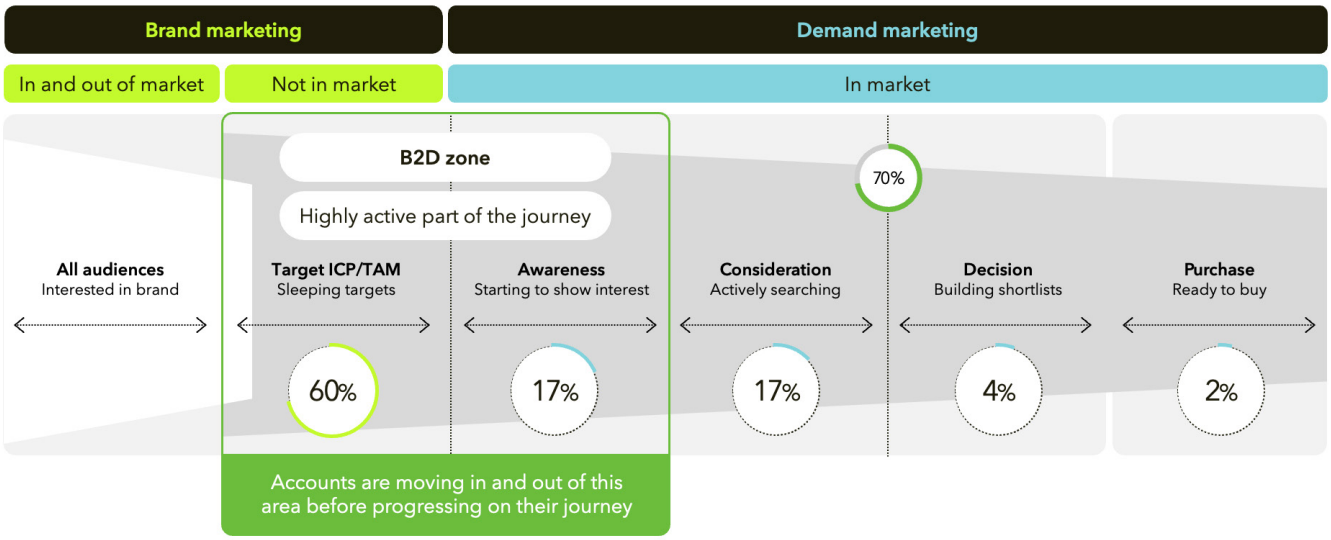
Buyability isn't about being the best solution, it's about being the most defensible choice when buyers enter the market. The drivers of this Buyability were revealed as reputation, trust and peer network validation — and they become more important the closer you get to the final buying decision, not less (as conventional wisdom suggests).

This new insight fundamentally reframes the role of brand as full funnel, and it suggests a new set of strategies and tactics to ensure you're on the shortlist on day 1.

Chapter 2:

Rethinking the 95/5 rule and why it matters now.

The 95/5 rule, popularized by the LinkedIn B2B Institute and rooted in the Ehrenberg-Bass Institute's research, states that only 5% of your addressable market is actively in market at any given time. While this remains directionally true, new data reveals a more complex picture that demands a refined response.



Source: 6sense - 19 million data points across more than 1,200 B2B brands

The active market is larger than you think

As buyers and buying groups move into market (the Brand-to-Demand Zone), key behaviors merge that are highly leverageable for marketers:

34% are actively exploring and evaluating solutions

4% are in decision mode, finalizing requirements and building consensus

2% are in purchase validation, confirming their choice

This means up to 40% of your market is exploring solutions at any time, but only 6% have progressed to the point where they are willing to engage with sellers. The other 60% that remain out of market require different engagement strategies.

6sense has dubbed the early stages of the buying journey — where 34% of your ideal customer profile (ICP) is — the Selection phase. During these early stages of their journeys, buyers are not just researching solutions, they are updating their brand memories and knowledge, debating about best fits and putting their shortlists in order. The favorite at the end of the Selection phase, when the shortlist is created, wins the deal 80% of the time.

The final two stages, Decision and Purchase, form the Validation phase. By the time they reach the Decision stage, most buyers will have already made a preliminary choice. The final two stages of the journey are about validating that choice.

The shift to brand awareness and repositioning

The Stein/ANA Brand-to-Demand Maturity Study reveals a critical imbalance: most B2B organizations allocate 70-80% of budget to demand programs targeting the 6% of buyers in late-stage buying and the 34% showing early signals, while underinvesting in reaching the other 60% who will enter the market in the next 12-18 months.

This misallocation has consequences:



Cost-per-lead inflation as vendors compete for the same 6%



Missed opportunities to shape consideration/selection before shortlists form



Weakened competitive position for the near, mid and long term as better-balanced competitors gain mindshare



Lower-funnel performance issues due to lack of brand awareness across the buying group

With buyers 20x more likely to purchase from a brand known by the whole buying group on day 1, the need to shift to balanced demand and brand marketing becomes evident.

Implications for media, messaging and measurement



Media mix
Balance investment across the three segments

- Out of market (60%) requires both big-burst and consistent brand presence for memory building as well as for keeping the market current on positioning and offerings
- The Selection phase (34%) needs intensive, real-time engagement to lock in the top spot on shortlists
- The Validation phase (6%) requires conversion-focused demand capture and seller enablement
- Dynamic reallocation and always-on presence as accounts move between segments



Messaging architecture
Deploy different narratives for different market states

- **Out of market (60%)**: Vision, transformation and category leadership/relevance
- **Selection phase (34%):** Problem articulation, solution exploration and differentiation
- **Validation phase (6%):** Proof, risk mitigation and urgency



Measurement evolution
Track progression through the 60/34/6 journey

- Monitor account movement from the 60% into the 34%
- Measure shortlist inclusion when accounts enter the Selection phase
- Track conversion efficiency for the 6% in the final stages
- Connect brand investment in the 60% to future pipeline generation

Chapter 3:

The Brand-to-Demand Zone defined.

The Brand-to-Demand (B2D) Zone represents the critical transition space where buyers shift from passive market participants to active evaluators. Understanding its characteristics, triggers and dynamics is essential for orchestrating effective engagement.

Characteristics of the B2D Zone

The B2D Zone is marked by several distinct features:

Heightened attention: Buyers become hyperaware of category messages. Content previously ignored suddenly becomes relevant. Your brand moves from background to foreground in their consciousness.

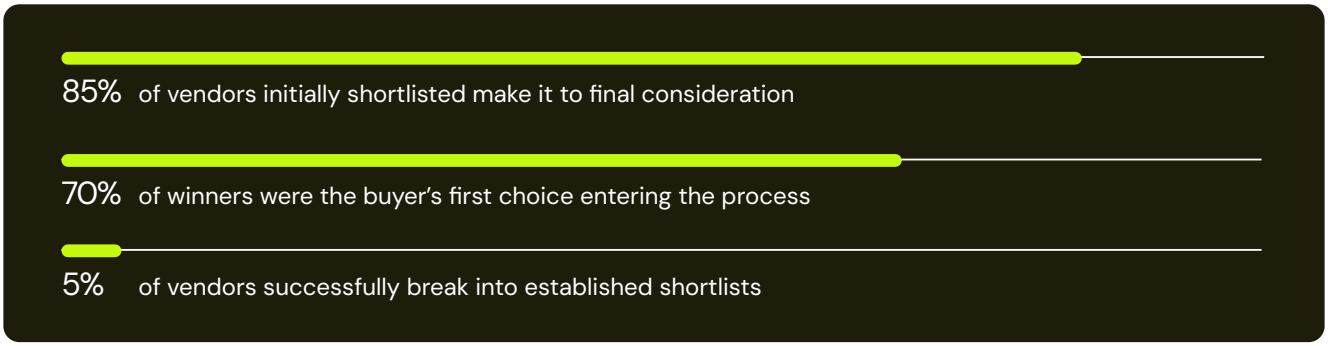
Accelerated learning: Information consumption intensifies. Buyers might engage with 20+ pieces of content in days after months of dormancy. They seek to quickly build expertise and confidence.

Network activation: Buyers tap their professional networks for recommendations. They join communities, attend webinars and seek peer validation. Social proof becomes paramount.

Shortlist crystallization: Mental shortlists solidify rapidly. Within 72 hours of entering the Zone, most buyers have identified their top 3-4 vendors. Late entrants face near-impossible odds.

Data insights: The 85% day 1 shortlist reality

The dominance of day 1 shortlists cannot be overstated. Our analysis of thousands of buying journeys reveals:



This data demolishes the myth that great sales execution can overcome weak brand position. By the time sales engages, the game is largely decided.

B2D Zone entry triggers: Three scenarios

Understanding what prompts buyers to enter the B2D Zone enables predictive engagement.

Scenario 1
Scheduled triggers

- Contract renewals approaching
- Annual planning cycles
- Compliance deadlines
- Budget availability

These buyers know they'll be in market months in advance. They passively monitor the category then shift to active mode on schedule. Predictable triggers enable proactive orchestration.

Scenario 2
Pain-driven triggers

- System failures or limitations
- Competitive pressure
- Efficiency mandates
- Growth constraints

These buyers enter the market urgently, often with truncated evaluation cycles. They prize speed and certainty over perfection. Vendors who can demonstrate immediate value win.

Scenario 3
Opportunity-driven triggers

- New funding or leadership
- Market expansion
- Digital transformation initiatives
- Competitive advantages identified

These buyers are pulled into market by possibility rather than pushed by pain. They're often more strategic, taking time to evaluate transformational approaches rather than quick fixes.

Buyer profiles in the B2D Zone

Buying groups enter the market for very different reasons. While category entry points can vary considerably for any given category, three generally applicable buyer profiles have been identified. These distinct buyer profiles navigate the B2D Zone quite differently.

Fast trackers

- Enter market with clear needs and requirements
- Form shortlists within 48 hours
- Move from awareness to decision in under 30 days
- Rely heavily on prior experience and peer recommendations
- Require being known immediately, with even less room to come in after a shortlist is created

Serial explorers

- Start and stop evaluation multiple times
- Constantly refine requirements based on learning
- May exit and re-enter the Zone multiple times
- Not solving an urgent need; less impetus to make a decision
- Are seeking the right validation and confidence to move forward

Boomerangers

- Explore solutions without clear or immediate intent to buy
- Often evaluating for future reference
- Are still evaluating the business case for acquiring a new solution
- Need access to clear business justification, ROI stories and proof points to convince skeptical hidden buyers
- Require nurture strategies that maintain engagement without pushing for immediate decision

Understanding that buyers from all three profiles will be engaging at any given time suggests the necessity to have content and go-to-market orchestration to support each. It is important to ensure — regardless of buyer profile — that the right content to capture their attention, interest and trust is easily findable. This means evolving approaches to integrate different strategies that are fit for different buyer states, so no audience is left behind.

PART TWO:

Winning strategies in the B2D Zone.

Success in the B2D Zone requires different strategies for different buyer states. This section details specific plays for out-of-market and in-market audiences, plus the always-on foundation that connects them

Chapter 4:

Out-of-market plays.

Out-of-market but good-fit accounts represent 60% of your total addressable market, the vast majority of future opportunities. Yet most B2B organizations dramatically underinvest in this audience, ceding tomorrow's pipeline to competitors who establish and maintain strong and consistent brand presence.

Objectives for out-of-market engagement

The key objective for marketing to out-of-market buyers is to keep them engaged, continuously receiving value from, and clarity on, your brand.



Build and maintain awareness

You can't win deals from buyers who don't know you exist or don't consider and trust that you are a category leader. Consistent presence ensures you're mentally available when triggers occur.



Establish category position

Define how you want to be remembered. Are you the innovation leader? The safe choice? The disruptor? Plant these associations to set the stage to be shortlisted when buyers move into market.



Prime future preference

Shape the criteria buyers will use to evaluate. If speed is your differentiator, make speed matter before they start looking. Show them what success looks like, aligned to your offering's features and benefits.



Re-engage past buyers

Most of your out-of-market audience has some prior experience with your brand. Refresh outdated perceptions with current positioning and offering focus.

Messaging principles for out-of-market engagement



Lead with vision, not product

Out-of-market buyers don't care about feature/function specificity. They care about brand leaders who can meet their needs in the future. Paint pictures of transformation, not specification.



Emphasize category, not company

Lead with category importance above your solution's superiority. If the problem doesn't matter, neither does your solution.



Deploy thought leadership

Demonstrate expertise through insights, not assertions. Help buyers think differently about their business.



Leverage executive voices

CEOs and senior leaders carry authority that product marketing lacks. Their vision delivered as content resonates with out-of-market executives planning strategic shifts.

Chapter 5:

In-market plays.

When buyers enter the market, the game fundamentally changes. Speed, relevancy and precision matter more than reach and frequency. Your objective shifts from building awareness to winning preference immediately. Your brand needs to be the first to intercept active buyers, ensuring you are delivering immediate relevancy before your competitors.

Objectives for in-market engagement



Intent interception

Identify and engage buying groups the moment they show signals of being in market. First movers gain disproportionate advantage in shortlist formation. Align creative and messaging with the category entry points (CEPs) used by buyers. Understand that most buyers will not want to engage personally, even while beginning a serious evaluation.



Emotional connection

In-market buyers seek justification to support their pre-existing preferences and biases rather than seeking out rationales for new options. Connect with their aspirations, not just their requirements.



Shortlist dominance

If you're on the shortlist, maximize your position. If you're not, execute breakthrough strategies to earn consideration.



Competitive displacement

Most evaluations include incumbents or established players. Provide clear reasons to switch, not just reasons to consider.

Leveraging intent data

Modern orchestration platforms provide unprecedented visibility into buying signals. But data without activation is worthless. Here's how to leverage intent in the B2D Zone:

Combining signal types Orchestrated activation

First-party intent: Your owned signal

- Website behavior showing research patterns
- Content consumption indicating interest areas
- Event attendance demonstrating commitment
- Direct inquiries revealing specific needs

Third-party intent: External signals

- Competitor website visits
- Category content consumption
- Peer review site activity
- Community question patterns

First + Third = Highest priority
(active on your site and elsewhere)

First only = Nurture opportunity
(interested but not actively buying)

Third only = Competitive opportunity
(shopping but haven't found you)

Low/no signal = Maintain awareness plays

Time series: The importance of sustained signals

- Notice and respond to bursts of signal to ensure shortlist includes your organization
- When bursts are not followed by sustained, elevated interest signals, pull back on demand capture spend and revert to out-of-market tactics

Quick message principles for in-market plays

Pain-first messaging: Lead with problem articulation

- "We understand you're struggling with..."
- "Companies like yours tell us..."
- "The challenge with traditional approaches..."

Proof-heavy content: Demonstrate capability

- Customer success stories with metrics
- Third-party validation and analyst recognition
- Product demonstrations and trials
- ROI calculators and business cases

Risk mitigation: Address hidden buyer careabouts

- Implementation methodology and timelines
- Change management support
- Financial stability and viability
- Post-purchase support structure

Category entry-point positioning

Professor Jenni Romaniuk's concept of CEPs is crucial for in-market success. CEPs are the cues that trigger brand consideration when buyers enter market. The more CEPs you own, the more likely you are to be shortlisted.

Identifying your CEPs

- When buyers think "speed," do they think of you?
- When buyers need "integration," are you top of mind?
- When buyers want "innovation," do you come up?

Building CEP dominance

- Consistently link your brand to specific CEPs
- Avoid dilution by focusing on competitive strengths
- Measure CEP ownership through brand tracking
- Defend owned CEPs while building new ones

Hero content formats

Interactive assessments

Help buyers evaluate their maturity and identify gaps. Provide personalized recommendations that position your solution as the logical next step.

Vendor comparison guides

Create honest comparisons that acknowledge competitor strengths while highlighting your differentiation. Buyers appreciate transparency.

Implementation playbooks

Show exactly how you'll deliver value. Detailed methodologies reduce perceived risk and accelerate decision making.

Business case frameworks

Provide tools that help buyers build business cases. When they use your framework to justify a purchase, you become integral to their success narrative.

LLM optimization strategies

With buyers increasingly using AI for research, your content must be optimized for LLM consumption. Until they go into market, and perhaps even after they form their shortlist, buyers are not going to see your new brand, shiny website or updated product offerings. They'll just see whatever the LLM shows them in black and white text on the screen.

When buyers cross the threshold into the demand side of the B2D Zone, the buying group will still come to your website, but whether you make the shortlist or not will depend to a great extent on how LLMs present you (or not) before they go into market.

Structured content

Use clear hierarchies and consistent formatting that AI can parse

Semantic clarity

Write with precise, unambiguous language that AI interprets correctly

Fresh perspectives

Regularly publish new insights that could be included in training updates

Q&A formats

Create content that directly answers the questions buyers ask AI

Competitive comparisons

Ensure your differentiation is clearly articulated for AI synthesis

Supporting buying groups vs. individual champions

Most B2B marketing targets individual champions, but purchases require group consensus. In-market strategies must enable champions to sell internally.

Champion enablement tools

- Executive presentation templates
- Email templates for stakeholder outreach
- FAQs addressing common objections
- Financial justification frameworks

Buying group content

- Role-specific value propositions
- Stakeholder-specific risk mitigation
- Cross-functional benefit articulation
- Group presentation tools

Consensus-building assets

- Comparison matrices for evaluation
- Scoring frameworks for decision making
- Reference architectures for implementation
- Success metrics for post-purchase

Chapter 6:

Always-on brand activation.

The B2D Zone demands continuous presence, not periodic campaigns. Always-on strategies maintain brand salience while remaining ready to capture demand signals instantly. This is what we call "brand simultaneity."

The case for balanced budget allocation

LinkedIn research reveals that organizations balancing brand and demand investment see:

208% more marketing-generated revenue

30% lower customer acquisition costs

40% shorter sales cycles

2.5x higher win rates

Yet, most B2B organizations allocate 70-80% to demand, starving brand of resources needed to fill tomorrow's pipeline.

The optimal mix

- Minimum 40% brand investment to maintain and build awareness, mental availability and brand preference
- Maximum 60% demand investment to capture current opportunity
- Flexibility to shift 10-20% based on market conditions
- Quarterly rebalancing based on pipeline coverage

The optimal mix and balance will also be determined by a number of other factors aligned with the growth cycle of a brand, including:

- Current levels of brand awareness and share of voice vs. competitors
- Category maturity (see Chapter 8 for more details)
- Growth objectives and annual revenue targets
- Brand maturity and growth cycle (start-up, fast growth vs. stable enterprise)

For more guidance in this area, the aforementioned BDX Maturity Study provides insight into overall marketing and media investment ratios.

Intent monitoring and dynamic activation

Always on doesn't mean always the same. Modern orchestration platforms enable dynamic activation based on real-time signals. Monitoring and scoring account behavior over time allows marketers to understand how to communicate effectively with buyers.

Account scoring models
Combine multiple signal types

- Engagement velocity (increasing touchpoints)
- Stakeholder expansion (more people involved)
- Content progression (moving from awareness to consideration assets)
- Competitive signals (researching alternatives)

Automated program triggers
Let signals determine tactics

- Minimal buying signals → Brand awareness campaigns
- Initial signal burst → Begin sequences to drive shortlist inclusion
- Ongoing buying signals → Implement journey-aligned demand programs, including sales activation, where appropriate
- Customer risk → Retention plays trigger

Budget fluidity
Shift spend to opportunity

- Set floor/ceiling ranges for brand/demand
- Allow 20% monthly flex based on signals
- Maintain reserve for competitive responses
- Track ROI by allocation mix to optimize

Brand simultaneity

The concept of "brand simultaneity" being meaningfully present wherever buyers are requires an orchestrated presence across touchpoints.

Owned channels
Your controlled narrative

- Website experience optimized for different buyer stages
- Email nurture tracks aligned to journey stage
- Community platforms fostering peer engagement
- Event strategies building personal connection

Earned channels
Your amplified authority

- Executive thought leadership in industry publications and events
- Analyst relations driving category conversations
- Customer advocacy in peer communities
- Employee voices on social platforms

Paid channels
Your scaled reach

- Always-on awareness campaigns to total addressable market
- Intent-triggered demand programs to in-market accounts
- Competitive conquesting when rivals show weakness
- Retargeting to maintain presence after engagement

Creative consistency across states

The buyer that's experiencing your brand shouldn't feel jarring shifts as they move from out of market to in market. Creative consistency ensures smooth progression and reinforces your brand across campaigns and media touchpoints. This is where brands can realize value from having a big, long idea (BLI). An idea big enough that it works across all stakeholders, media formats and campaigns, and also long enough to support all stages of the customer journey as well as emotional and rational content needs. An effective BLI provides a golden thread that connects all stages of the brand-to-demand journey.

Brand and visual identity
Recognizable across touchpoints

- Consistent color, typography and imagery
- Flexible templates adapting to different formats
- Motion principles carrying through video and digital
- Distinctive assets that build memory structures across the journey

Message architecture
Connected narratives

- Brand promise flowing into product proof
- Vision statements supporting benefit claims
- Customer success reinforcing brand attributes
- Competitive differentiation laddering to brand position

Tonal progression
Appropriate to buyer state as well as emotional and rational needs

- Inspirational and visionary for out of market
- Educational and helpful for early market
- Confident and specific for in market
- Supportive and reassuring for Decision stage

LLM presence strategies

To ensure strong LLM presence to build your brand reputation and support early-stage consideration.

Content authority
Be the cited source

- Publish definitive guides that become references
- Create frameworks that shape category thinking
- Generate research that others quote
- Build glossaries that define category terms

Semantic ownership
Own category language

- Consistently use specific phrases you want to own
- Create unique terminology that becomes the category standard
- Build conceptual frameworks that require your interpretation
- Develop methodologies that competitors must acknowledge

Fresh insights
Stay in the conversation

- Establish regular publishing cadence to ensure content freshness
- Develop newsworthy research that media covers
- Share controversial perspectives that spark discussion
- Publish future-focused predictions that demonstrate leadership

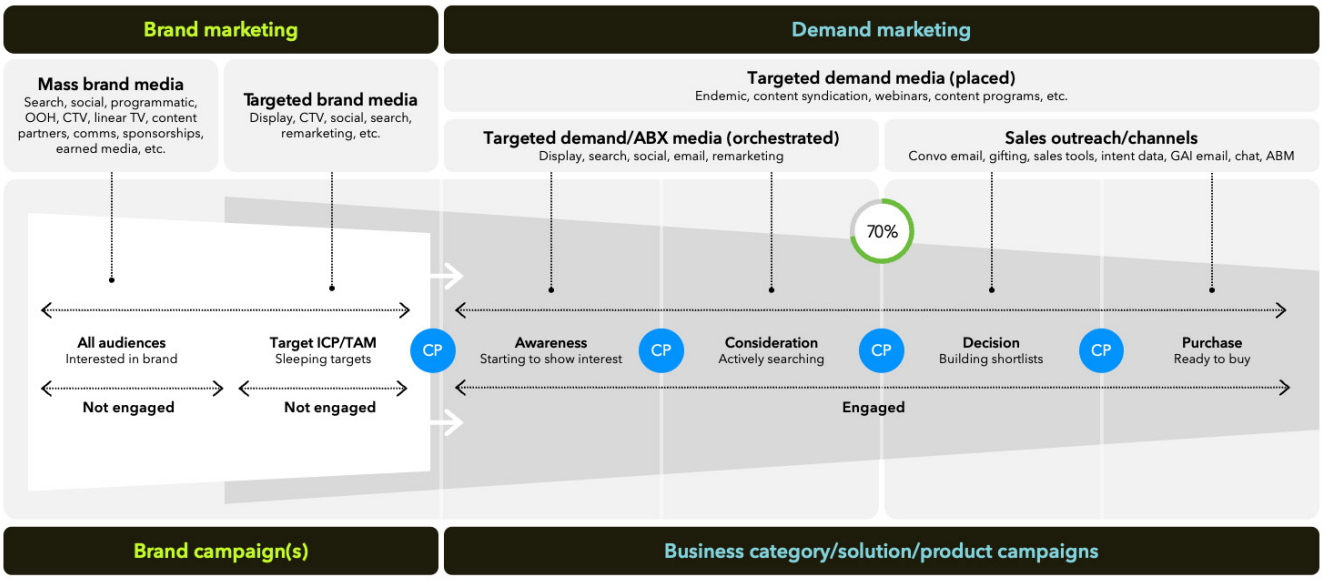
PART THREE:

Practical application and the Category–Brand Matrix.

Chapter 7:

The BDX Model in action.

The Brand-to-Demand Experience (BDX) Model provides a practical methodology for orchestrating unified go-to-market strategies. This chapter translates theory into actionable steps.



Mapping your ICP across journey stages

Start by understanding where your ideal customer profile (ICP) accounts currently sit:

Journey distribution analysis

01 Segment your total addressable market by account

02 Score each account's current journey position using intent and engagement data

03 Map distribution across stages (typically 60% out of market, 34% early market, 6% in market)

04 Identify movement patterns and velocity between stages

05 Project future pipeline based on current distribution

Account prioritization framework

Tier 1a: High-fit accounts showing sustained in-market signals (immediate activation)

Tier 1b: High-fit accounts showing signal bursts, suggesting possible start of a buying journey

Tier 2: High-fit accounts out of market (brand investment priority)

Tier 3: Medium-fit accounts showing sustained in-market signals (selective engagement)

Tier 4: Broader market (efficient awareness plays)

Identifying and segmenting buying groups

Modern B2B purchases involve 11+ stakeholders on average. Each requires different messaging and content:

Core buying group roles

- **Economic buyer:** ROI, risk, strategic value
- **Technical evaluator:** Capabilities, integration, architecture
- **User champion:** Usability, efficiency, daily impact
- **Executive sponsor:** Transformation, competitive advantage, vision
- **Hidden influencers:** Compliance, security, scalability

Stakeholder journey mapping

- Plot each role's typical engagement pattern
- Identify content preferences by role
- Map influence dynamics between roles
- Design orchestration sequences for group progression

Trigger-based activation planning

Build response plans for each entry trigger type:

Scheduled trigger response

- Begin engagement six months before known events
- Escalate intensity as trigger approaches
- Position as trusted advisor, not opportunistic vendor
- Provide value whether they buy or not

Pain trigger response

- Lead with empathy and understanding
- Provide immediate value through insights
- Demonstrate rapid time to value
- Show similar customer success stories

Opportunity trigger response

- Focus on possibility and transformation
- Provide vision and roadmap
- Connect to strategic initiatives
- Demonstrate thought leadership

Key performance metrics (KPIs) for each stage

Measure what matters at each journey stage:

Out-of-market KPIs

- Unaided brand awareness
- Category consideration
- Share of voice
- Share of search
- Engagement rate with thought leadership
- Account reach within ICP

Early-market KPIs

- Intent signal velocity
- Content engagement depth
- Stakeholder expansion rate
- Progressive engagement score
- Shortlist inclusion rate
- Share of search

In-market KPIs

- Buying group engagement
- Qualified opportunity creation
- Sales acceptance rate
- Win rate
- Deal velocity
- Average contract value

Holistic metrics

- Brand contribution to pipeline
- Brand impact on conversion uplift from MQL/AQL to SQO
- Account progression velocity
- Customer acquisition cost
- Lifetime value to customer acquisition cost (CAC) ratio
- Revenue per marketing dollar invested

Chapter 8:

The Category-Brand Matrix.

Different buyer journeys are far from identical. Your brand's market position and category dynamics fundamentally shape how buyers engage with you. The Category-Brand Matrix provides a strategic framework for tailoring your approach.

Understanding your position

Two dimensions determine your strategic imperatives:

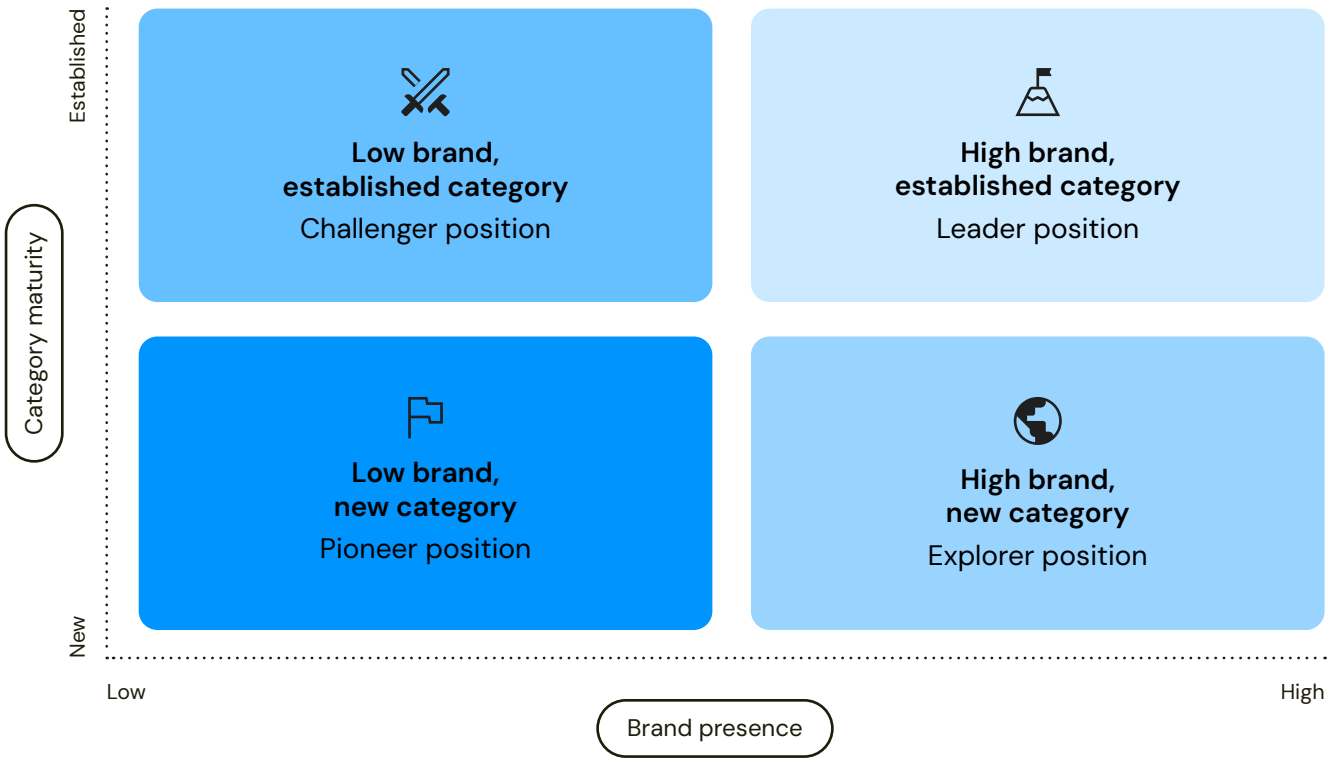
Brand presence
How well known are you?

- High: Approaching 100% awareness among ICP
- Low: Limited recognition requiring awareness building

Category maturity
How established is your solution category?

- Established: Clear business case, defined vendors, understood value, market penetration of category near 100%
- New: Emerging need, undefined solution space, educational requirement

Four strategic quadrants



Low brand, established category (challenger position)

You're unknown in a defined space. Breaking through requires differentiation.

Characteristics	Strategic imperatives
• No established competitors	• Define the category before competitors do
• Business case not proven	• Become the thought leader and trusted source
• Buyers don't know to look for you	• Build awareness through education, not promotion
• Long education cycles required	• Create the vocabulary others must adopt
	• Build category advocates within analyst and journalist communities

Low brand, established category (challenger position)

You're unknown in a defined space. Breaking through requires differentiation.

Characteristics	Strategic imperatives
• Entrenched competitors with strong positions	• Identify underserved segments or use cases
• Buyers have established preferences	• Challenge category conventions
• Clear evaluation criteria exist	• Demonstrate clear differentiation
• Price and feature comparisons dominate	• Build credibility through customer proof
	• Leverage third parties for deal intros and social proof

High brand, new category (explorer position)

You're known but entering uncharted territory. Leverage trust to define new space.

Characteristics	Strategic imperatives
• Strong reputation in other categories	• Transfer brand equity to new category
• Existing customer relationships	• Leverage customer base for early adoption
• Credibility but not category authority	• Use reputation to build category credibility
• Permission to innovate	• Partner with analysts to define space

High brand, established category (leader position)

You're known and in a defined space. Maintain dominance while driving innovation.

Characteristics	Strategic imperatives
• High consideration and shortlist inclusion	• Defend position through innovation
• Competitive threats from multiple directions	• Shape category evolution
• Commoditization pressure	• Expand definition to maintain differentiation
• Expectation of thought leadership	• Build switching barriers through ecosystem

Breaking into established categories

There is an assumption that only big legacy brands dominate key categories and their related shortlists (e.g., IBM, Microsoft, HP, Salesforce in the technology category); however, Brand Finance data reveals encouraging news: the B2B brand landscape is more fluid than many believe, providing hope for fast-growth challenger brands. Its research shows:

- League table list expansion from 100 to 150 brands in one year, increasing to 250 brands in 2026
- NVIDIA's 41-position jump proving rapid rise is possible
- 10% year-over-year growth in total brand value ($250 billion new value) creates opportunities for movement
- M&A activity can dramatically alter positions

Strategies for category entry

Find the underserved edge
Established players can't serve everyone equally

- Identify segments they ignore or undervalue
- Build dominant position in niche before expanding
- Use success stories to build broader credibility
- Gradually expand from edge to center

Leverage technology shifts
Disruption creates opportunity

- AI transformation reshuffling vendor positions
- Cloud migration opening new requirements
- Digital transformation changing buyer needs
- Sustainability mandates creating new criteria

Reframe the category
Change the conversation

- Introduce new evaluation criteria
- Shift focus from features to outcomes
- Create new category segments
- Challenge fundamental assumptions

Build a coalition of customers
Success stories break through

- Focus on lighthouse customers who influence others
- Create customer communities that self-advocate
- Generate peer validation through case studies
- Enable customer-to-prospect selling

Remember: established doesn't mean immovable. Every leader was once a challenger. Every category was once new. Your position today doesn't determine your position tomorrow, your strategy does.

PART FOUR:

B2D Zone maturity action plan.

From laying the foundation to progressive activation and maturity, planning to capitalize on the B2D Zone

Chapter 9:

Where to start.

Transforming your go-to-market strategy requires systematic progression. This action plan provides the roadmap.

Key dependencies for success

Before launching your B2D transformation, ensuring the following foundational elements are in place:



Orchestration technology
You can't manually coordinate always-on presence

- Buying signal platform (like 6sense) for signal visibility and orchestration
- Marketing automation for scalable engagement
- CRM integration for unified account view
- Content management for asset activation



Content and messaging architecture: Fuel for the engine

- Journey-staged content library
- Role-specific messaging frameworks
- Competitive differentiation guides
- Customer success story bank
- Thought leadership calendar



Organizational alignment:
United front to market

- Shared KPIs between brand and demand teams
- Integrated planning processes
- Cross-functional account teams
- Unified budget planning
- Common measurement framework

To go deeper in this area, refer to "Unifying Brand to Demand: Unlocking Sustainable Growth in B2B," which outlines the six strategic pillars brands need to consider to ensure you have a solid foundation for advanced brand-to-demand deployment.

Assessment and prioritization

Step 1: Current state diagnosis

Honestly evaluate your starting position:

- What percentage of budget goes to brand vs. demand?
- How many of your deals come from day 1 shortlists?
- How often do you lose uncontested deals?
- What's your unaided awareness among your ICP?
- How integrated are your brand and demand teams?
- What percentage of pipeline comes from marketing?

Step 2: Maturity mapping

Place yourself on the B2D maturity scale:

- Under-invested in brand (<25% budget to brand)
- Disconnected (balanced budget but siloed execution)
- Connected (integrated strategies and measurement)
- Fully unified (complete orchestration)

Most organizations start in one of the first two stages. That's OK — what matters is progression.

Step 3: Gap analysis

Identify your three biggest gaps:

- Investment allocation
- Creative consistency
- Measurement integration
- Technology enablement
- Organizational structure
- Content architecture

Step 4: Quick win identifications

Find opportunities for immediate impact:

- Intent data activation for in-market accounts
- Brand investment in highest-value segments
- Creative alignment across touchpoints
- Measurement dashboard unification
- Sales and marketing alignment on ICP

Quick wins build momentum and credibility for larger transformation.

Implementation roadmap

Quarter 1: Foundation building

- Establish unified KPI framework
- Implement buyer signal platform and orchestration tools
- Assess brand and category maturity positioning
- Perform content audit and gap analysis
- Align brand and demand teams on ICP
- Launch pilot integrated campaign

Quarter 2: Capability development

- Build journey-staged content library
- Implement orchestration workflows
- Develop role-specific messaging
- Create attribution model
- Expand integrated campaigns

Quarter 3: Scale and optimization

- Roll out always-on brand programs
- Activate dynamic budget allocation
- Launch buying group orchestration
- Implement LLM optimization
- Measure and optimize performance

Quarter 4: Maturity advancement

- Assess progress against maturity model
- Identify next-stage requirements
- Plan following year transformation
- Document learnings and best practices
- Celebrate wins and build momentum

Key success metrics

Track both leading and lagging indicators:

Leading indicators (monthly tracking)

- Account engagement velocity
- Intent signal growth
- Content engagement depth
- Stakeholder expansion
- Brand awareness lift

Lagging indicators (quarterly tracking)

- Pipeline contribution
- Win rate improvement
- Sales cycle reduction
- Customer acquisition cost
- Revenue per marketing dollar

Transformation metrics (annual tracking)

- Maturity model progression
- Budget balance shift
- Team integration score
- Technology adoption rate
- Process optimization level

Chapter 10:

Key takeaways and next steps.

As we conclude this playbook, let's crystallize the essential insights and chart your path forward.

Core principles for B2D success



1. The shortlist imperative

If you're not on the day 1 shortlist, you've already lost. This isn't about lead generation, it's about memory creation before buyers enter the market.



2. Brand simultaneity

Success requires continuous presence across the entire journey. You can't afford to be visible only when buyers raise their hands.



3. Buyer group orchestration

B2B purchases are team sports. Enable champions while engaging the full buying group with role-relevant value propositions.



4. Signal-driven activation

Let buyer behavior, not campaign calendars, determine engagement intensity. Modern orchestration platforms make this possible and scalable.



5. Investment rebalancing

The optimal mix approaches 50/50 between brand and demand. Most organizations must gradually shift from their current 20/80 split.



6. Creative consistency

Disconnected brand and demand creative confuses buyers and weakens impact. Unified creative platforms amplify both awareness and conversion.



7. Measurement unification

Separate brand and demand KPIs perpetuate silos. Integrated measurement proves marketing's full contribution to growth.

Immediate actions for marketing teams

Start your transformation with these concrete steps:



Week 1
Baseline assessment

- Calculate your current brand/ demand budget split
- Assess your day 1 shortlist inclusion rate
- Map your content to buyer journey stages
- Evaluate team structure and alignment
- Review measurement and attribution



Weeks 2-4
Quick-win planning

- Identify top 100 target accounts
- Implement basic intent monitoring
- Align brand and demand on messaging
- Create unified performance dashboard
- Design pilot integrated campaign



Months 2-3
Pilot execution

- Launch integrated campaign to select segment
- Test orchestration workflows
- Measure brand and demand impact together
- Document learnings and obstacles
- Build business case for expansion



Quarter 2 and beyond
Scale and transform

- Expand successful pilots
- Increase brand investment gradually
- Build journey-staged content library
- Implement full orchestration platform
- Transform organization and processes

The B2D Readiness Checklist.

Before you go all in, ensure you have:

- [ ] **Executive sponsorship** for brand-to-demand unification
- [ ] **Budget flexibility** to rebalance investment
- [ ] **Intent data capability** to identify signals
- [ ] **Content strategy and assets** spanning journey stages
- [ ] **Unified KPIs** connecting brand to demand to revenue
- [ ] **Orchestration platform** for automated activation and buying signal tracking
- [ ] **Aligned teams** with shared objectives
- [ ] **Measurement framework** proving impact
- [ ] **Competitive intelligence** on market dynamics
- [ ] **Customer insights** on buying behavior

Final takeaway

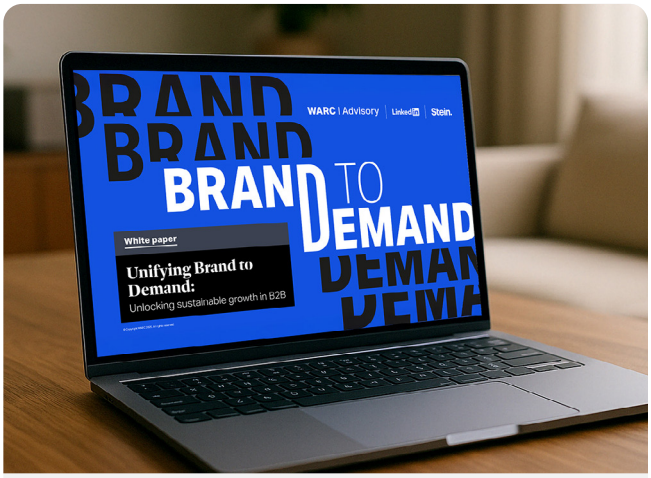
The future belongs to the unified brands that take advantage of the B2D Zone.

The days of disconnected brand and demand are ending. Buyers demand seamless experiences. Technology enables orchestration. Data reveals the path. The only question is whether you'll lead this transformation or miss making the shortlist and follow competitors who do.

The companies that unify brand and demand — and, importantly, utilize the Brand-to-Demand Zone — will capture disproportionate growth. They'll win more shortlists, convert more opportunities and build more valuable customer relationships. They'll spend less to achieve more.

The B2D Zone isn't just a concept, it's where modern B2B growth happens. Master it, and you master your market.

Appendix.



Full BDX Playbook

The complete brand-to-demand experience playbook is available here:

Read the report



Full BDX Maturity Study

The complete BDX Maturity Study is available at here:

Read the study



6sense Buyer Report

Key findings from 6sense's analysis of 19 million buyer interactions, including detailed breakdowns of journey stages, buying group dynamics and signal patterns.

Read the report



Additional resources

- B2B Institute: "How B2B Brands Grow"
- LinkedIn: "The Long and Short of B2B Marketing"
- WARC: "The Multiplier Effect"
- Ehrenberg-Bass Institute: "The 95-5 Rule"
- Bain & Company: "The Hidden Buyers Report"

Stein.

About Stein.

Stein helps build the world's most demanded B2B brands by unifying brand and demand — strengthening each to the benefit of both. Through its Brand-to-Demand Experience (BDX) Model, highly awarded creativity and full-funnel media capabilities, Stein drives differentiation, distinction and growth for clients worldwide. Stein was recognized in the Creative B2B Lions at Cannes, named ANA B2 and Global ACE Agency of the Year in 2023, 2024 and 2025, and has been named ANA B2B Agency of the Year 13 times over the past 15 years. Stein is the only B2B agency to have won WARC Awards for Effectiveness (Gold) across consecutive years. The agency also received an Investors in People Award in 2024 for commitment to the advancement of our most precious resource — our people.

Learn more at www.steinb2b.com

About Marc Keating.

Marc is responsible for leading digital transformation strategies and innovations at Stein, across GTM, technology, data and media. Marc's passion is helping clients achieve unified brand-to-demand experiences that build brand strength and demand strength in concert and is the creator and author of the BDX strategy, methodology and framework featured in the seminal 2024 WARC playbook, "Unifying Brand to Demand: Unlocking Sustainable Growth in B2B." Marc has been named by The Internationalist as one of its 27 agency Innovators, named by the Drum Magazine as a Martech Hero and Marketing Agency Leader of the Year, and awarded Martech Visionary of the Year by B2B Marketing. Marc is also a speaker and contributor to thought leadership initiatives across the ANA, The Drum, IAA, Cannes, WARC, Lions and LinkedIn.



Marc Keating

Chief Innovation Officer, Stein

marc.keating@steinb2b.com

About 6sense.

6sense is the first agent-powered revenue marketing platform. Built to unify your data, channels and teams, 6sense puts AI agents to work across every part of your go-to-market strategy, so you can move faster, waste less and drive more revenue with precision. Companies like SAP, Cisco, Okta and Qualtrics use 6sense to build pipeline, win bigger deals and close faster, with 2x deal sizes and 4x higher win rates.

Learn more at www.6sense.com

About Kerry Cunningham.

Kerry is a renowned B2B thought leader with over 25 years of experience in demand generation, sales and marketing operations. At 6sense, he leads research and thought leadership, shaping how revenue teams approach buying signals, intent data and go-to-market strategy. Prior to 6sense, he was a principal analyst at Forrester and SiriusDecisions, where he co-authored the widely adopted Demand Unit Waterfall and advised hundreds of enterprise clients. His career spans leadership roles across product marketing, telesales and demand process design, bringing both academic rigor and practical insight to modern revenue challenges.



Kerry Cunningham

Head of Research & Thought Leadership, 6sense

kerry.cunningham@6sense.com