

American University Kyiv

A Capstone Project

MANAGEMENT OF STRATEGIC GROWTH IN B2B MARKETING: EFFECTIVE APPROACHES
TO BRAND BUILDING AND SALES ACTIVATION (CASE STUDY)

УПРАВЛІННЯ СТРАТЕГІЧНИМ ЗРОСТАННЯМ У МАРКЕТИНГУ В2В: ЕФЕКТИВНІ
ПІДХОДИ ДО РОЗВИТКУ БРЕНДУ (КЕЙС СТАДІ)

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ABSTRACT

This capstone explores the strategic management of growth in B2B marketing, focusing on balancing long-term brand building and short-term sales activation to achieve sustainable outcomes. The research addresses the question: How can B2B marketers effectively harmonize branding and sales strategies to foster growth? Using a mixed-methods approach, the study integrates insights from literature, survey data, and a Salesforce case study to highlight practical applications of theoretical models.

The primary objective of this research is to explore the alignment between prevailing perceptions of effective B2B marketing strategies and evidence from academic research and Salesforce case study.

The findings emphasize the importance of mental availability, consistent branding, and emotional storytelling in B2B contexts. Survey data reveals a preference for short-term sales tactics over long-term brand-building investments, reflecting gaps in understanding the compounding benefits of brand equity. The Salesforce case study demonstrates how leading organizations balance these priorities through thought leadership, customer advocacy, and data-driven strategies.

The study concludes that achieving sustainable growth requires integrating emotional and rational messaging, leveraging customer advocacy, and adopting data-driven decision-making. These insights bridge theoretical frameworks with real-world applications, offering actionable recommendations for practitioners. Future research is proposed to explore evolving digital marketing dynamics and the integration of artificial intelligence in B2B strategies.

Keywords: B2B marketing, brand building, sales activation, mental availability, customer advocacy.

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CHAPTER 1. INTRODUCTION

In the dynamic and complex landscape of business-to-business (B2B) marketing, organizations must navigate a unique set of challenges that differ significantly from business-to-consumer (B2C) contexts. In B2B, purchasing decisions are often shaped by extended sales cycles, rational evaluation, and the involvement of multiple stakeholders. Effective marketing strategies in this space require a delicate balance between short-term sales activation and long-term brand-building efforts to ensure sustainable growth and competitive advantage.

While branding is traditionally associated with B2C marketing, its importance in B2B contexts has become increasingly evident. Research highlights that mental availability, thought leadership, and customer advocacy are pivotal in building trust, fostering loyalty, and influencing decision-making across organizational hierarchies. However, many B2B marketers continue to prioritize immediate lead generation tactics over long-term brand-building investments, leading to a disconnect between perceived effective practices and evidence-based strategies.

This capstone project, "Management of Strategic Growth in B2B Marketing: Effective Approaches to Brand Building and Sales Activation," investigates how B2B marketers perceive effective marketing practices and compares these perceptions with scientifically validated strategies. Through a mixed-methods approach that includes a structured survey, a literature review, and an in-depth case study of Salesforce, this research assesses the alignment—or misalignment—between marketing beliefs and best practices.

This research addresses a critical gap in B2B marketing by comparing perceived practices with scientifically validated strategies. The study's findings are highly relevant for marketing professionals seeking to optimize their approaches, align their practices with evidence-based frameworks, and achieve sustainable growth in competitive markets.

The structured survey reveals valuable insights into how B2B marketers allocate resources, prioritize strategies, and measure success. By cross-referencing these perceptions with best practices from leading academic and industry research, the study provides a roadmap for improving marketing effectiveness. The Salesforce case study serves as a benchmark, offering practical examples of how leading organizations harmonize short-term sales activation with long-term brand-building goals.

CHAPTER 2. LITERATURE REVIEW

This chapter reviews the existing literature on B2B marketing strategies and highlights the gaps in knowledge, particularly concerning the unique requirements of B2B markets for managing brand growth effectively. Research in this area has shown that B2B and B2C markets differ significantly, especially in terms of branding, customer decision-making, and the integration of sales and marketing strategies. The review synthesizes insights from key studies while identifying areas that require further investigation.

Research on the impact of long-term and short-term marketing strategies has been more prevalent in B2C contexts, with limited application to B2B markets. [Ataman, Heerde, and Mela](#) (2010) examined the long-term effects of marketing strategies in mature B2C markets, revealing that investments in distribution and product strategies deliver more significant long-term benefits than advertising or discounting. While this study provides a robust framework, its focus on B2C markets highlights a gap in understanding how these principles translate to the complex decision-making processes of B2B markets.

[Majerová and Kubjatkova's](#) (2020) study, *Brand Value Building and Management on B2B Markets*, emphasizes the distinct needs of B2B markets, where branding must adapt to business customers' unique attributes and decision-making processes. Their research highlights the importance of strategic brand management tailored to B2B audiences. However, while it identifies the need for adaptation, it does not fully explore how short-term sales activations can be harmonized with these long-term brand-building efforts.

[John Dawes'](#) (2021) article, *Advertising effectiveness and the 95-5 rule: most B2B buyers are not in the market right now*, offers crucial insights into the distinctive mechanics of advertising in B2B markets, where up to 95% of potential buyers are typically "out of market" at any given time. This framework fundamentally shifts the perspective on how advertising functions in B2B contexts. Rather than focusing exclusively on immediate purchase stimulation, advertising is framed as a tool for building and refreshing memory links to a brand, a concept closely aligned with Sharp's (2010) theory of mental availability.

The findings from "[The CMO Scorecard](#)" (Hollis et al., 2023) further underscore the importance of brand advertising in B2B marketing, especially in creating demand among "out-market" buyers, who represent 95% of future customers. This research challenges the prevailing reliance on short-term lead generation tactics, emphasizing that brand advertising builds long-term memory structures critical for mental availability. The study identifies creative quality and media reach as primary drivers of

advertising effectiveness, accounting for 47% and 38% of outcomes, respectively. By prioritizing consistent, high-quality creative execution and broader audience reach, B2B marketers can significantly enhance mental availability and position their brands favorably when buyers eventually enter the market. These insights complement the existing literature on mental availability and situational awareness, reinforcing the necessity of a balanced strategy that integrates long-term brand building with short-term sales activation.

Sharp (2010) introduced the concept of mental availability, which focuses on a brand's ability to be easily recalled and recognized by consumers as a cornerstone of market penetration. This model underscores the importance of consistent and distinctive branding. Vaughan et al. (2020) expanded on this concept by exploring how advertising improves brand recall through mental availability metrics.

[Romaniuk's \(2021\)](#) study underscores that lack of brand awareness poses a significantly greater barrier to customer acquisition in B2B markets than active brand rejection, particularly for smaller brands. The research highlights the importance of building mental availability through consistent marketing efforts to ensure brands are top-of-mind when buyers enter the market.

Recent contributions from the B2B Institute, particularly the work of [Binet and Field \(2023\)](#), further underscore the necessity of balancing long-term brand-building and short-term sales activation in B2B contexts. Their findings reveal that the principles of mental availability, share of voice, and emotional engagement—widely validated in B2C marketing—are equally critical for B2B brands. Binet and Field argue that long-term brand-building strategies generate lasting mental availability, which ensures that the brand is top-of-mind when buyers are ready to make purchasing decisions. The research highlights that brands focusing disproportionately on short-term activation miss the opportunity to establish a competitive edge through emotional engagement and broader market reach.

Pulizzi (2014) emphasized the importance of thought leadership in B2B marketing, particularly its ability to position brands as trusted authorities. By providing high-value educational content, B2B brands can build credibility and foster long-term relationships with clients. Similarly, Keller and Fay (2012) underscored the role of word-of-mouth marketing and advocacy in influencing purchase decisions.

The survey component of this research investigates whether marketers prioritize thought leadership and advocacy, and how these practices are perceived in terms of effectiveness for brand growth and sales activation. These insights are cross-referenced with case study findings to assess alignment with proven strategies.

This literature review establishes the theoretical foundation for the research, identifying key themes and gaps that inform the study's methodology. By synthesizing insights from established frameworks and contemporary findings, it highlights critical areas for investigation, including resource allocation, emotional versus rational messaging, and the integration of branding and sales activation. The next chapter outlines the methodology employed to explore these questions, linking survey design and case study analysis to the literature reviewed here.

Despite advancements in understanding B2B marketing, significant gaps remain. Existing research often isolates long-term brand-building and short-term sales activation as distinct areas of focus, with minimal exploration of how these strategies can be integrated effectively. Lilien's (2016) critique of the "B2B knowledge gap" underscores the lack of academic attention toward B2B-specific challenges, such as balancing brand equity with immediate sales outcomes.

This study addresses these gaps by examining the alignment between marketer beliefs and evidence-based practices. The survey and case study components provide a practical framework for bridging this divide, contributing to the broader understanding of sustainable marketing strategies in B2B contexts.

CHAPTER 3. METHODOLOGY

Understanding the gap between what B2B marketers believe to be effective and what research demonstrates as impactful is critical to improving marketing practices in complex, multi-stakeholder environments. This chapter outlines the methodology used to explore these discrepancies. By combining a structured survey with cross-references to scientific literature and a practical case study, the research seeks to uncover common misconceptions, validate or refute current practices, and provide actionable recommendations. Each component of this methodology builds on the insights from the literature review, framing the research within the broader context of sustainable brand growth and effective sales activation in B2B marketing.

3.1 Research Objectives

The research is grounded in the core hypothesis that B2B marketers often rely on familiar practices, believing them to be effective, while evidence suggests alternative strategies may yield better results. The objectives of this study are:

1. **Understanding Current Beliefs:** To identify marketers' perceptions of the most effective strategies for brand building and sales activation.
2. **Validating Practices with Evidence:** To compare these perceptions with scientific findings to determine alignment or divergence.
3. **Practical Application:** To illustrate best practices through Salesforce, a company recognized for its exemplary marketing strategies.
4. **Synthesis and Recommendations:** To bridge the gap between belief and evidence, offering marketers a roadmap to align their practices with proven strategies.

These objectives are interrelated, providing a comprehensive narrative that moves from uncovering beliefs to validating evidence and offering actionable insights.

3.2 Research Design

The study employs a mixed-methods approach, combining quantitative and qualitative techniques to address the research objectives comprehensively. This approach ensures a balance of statistical rigor and contextual depth.

Survey

The survey is central to the research, designed to uncover the beliefs and practices of B2B marketers regarding brand building and sales activation. It focuses on key themes identified in the literature review, ensuring relevance and applicability. Specifically, the survey aims to:

- 1) Identify how marketers allocate resources between brand building and sales activation.
- 2) Assess the perceived effectiveness of emotional versus rational messaging.
- 3) Explore the role of mental availability in driving brand growth.
- 4) Evaluate beliefs about customer advocacy and thought leadership.

3.3. Survey Questions and Relevance

Each survey question corresponds to a critical issue discussed in the literature [Annex]:

1. **Resource Allocation:** Questions on budget distribution between long-term and short-term strategies are based on Binet and Field's (2017) 60/40 investment rule for optimal marketing outcomes.

2. **Messaging Effectiveness:** Questions about emotional and rational messaging reflect Lynch and de Chernatony's (2004) findings on the power of emotional branding in B2B contexts.
3. **Mental Availability:** Questions on brand recall and visibility derive from Sharp's (2010) framework on mental availability.
4. **Thought Leadership:** Questions about the value of thought leadership align with Pulizzi's (2014) research, which highlights the importance of trust and authority in B2B buying decisions.

Survey

Format

To ensure clarity and comparability, the survey included:

- **Rating Scales:** Participants rated perceived effectiveness and priority on a Likert scale.
- **Scenario-Based Questions:** Participants responded to hypothetical budget allocation scenarios to test decision-making preferences.
- **Multiple-Choice Questions:** Participants selected preferred strategies for specific objectives.

Participant

Selection

The survey targeted professionals in marketing roles within B2B organizations, ensuring relevance to the research objectives. Participants were sourced from LinkedIn and professional networks to ensure diversity across industries.

3.4 Validating Practices with Evidence

The second component of this methodology involves cross-referencing survey findings with the literature reviewed in Chapter 2. This ensures that the research is not only descriptive but also evaluative, highlighting where marketers' beliefs align with or diverge from evidence-based strategies. Frameworks such as Sharp's (2010) mental availability model and Binet and Field's (2017) investment rule provide benchmarks for validation.

3.5 Salesforce Case Study

To complement the survey and literature analysis, Salesforce was selected as a case study for its exemplary marketing strategies. The case study focuses on:

1. Salesforce's use of consistent branding and thought leadership to establish mental availability.

2. The integration of emotional messaging and customer advocacy to build long-term relationships.
3. Data-driven tools and analytics employed for optimizing campaigns and driving immediate sales.

This case study bridges the theoretical frameworks explored in the literature review and the practical insights derived from the survey, providing a holistic perspective on effective marketing strategies.

3.7 Limitations

While the methodology is robust, certain limitations are acknowledged:

- **Sample Bias:** The survey sample may not comprehensively represent all B2B industries.
- **Self-Reported Data:** Participants' responses may reflect subjective perceptions rather than actual practices.
- **Case Study Generalizability:** Insights from Salesforce's strategies may not be universally applicable across all sectors or regions.

CHAPTER 4. FINDINGS

The survey engaged marketing professionals predominantly in B2B contexts, with 57.1% identifying as marketing managers, CMOs, or business development managers. Respondents were divided between those with extensive experience (over 10 years, 42.9%) and early-career professionals (less than three years, 42.9%), ensuring diverse perspectives.

The majority of respondents represented the professional services sector (57.1%), followed by SaaS, cybersecurity, and trading industries. This sectoral concentration ensures relevance to B2B marketing but limits generalizability to industries like healthcare or consumer goods. Lead generation emerged as the top priority (42.9%), followed by brand awareness and customer retention, reflecting a dual focus on immediate performance and long-term growth.

A majority of respondents (42.9%) reported direct involvement in strategic marketing decisions, while 28.6% influenced these decisions indirectly. This highlights a strategic orientation in the survey responses, providing valuable insights into high-level priorities but potentially overlooking the nuances of tactical implementation.

Effectiveness of Marketing Approaches

Emotional Storytelling

Survey participants overwhelmingly rated emotional storytelling as the most effective marketing approach (mean rating = 4.86), emphasizing values such as trust and innovation.

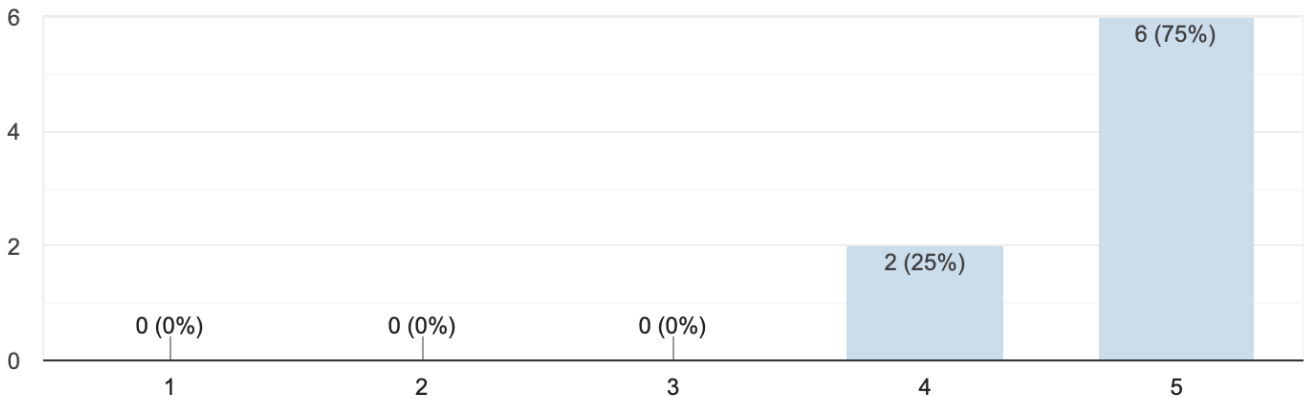


Chart 1: Perceived Effectiveness of Emotional storytelling.

Source: Survey conducted by the author.

This finding aligns with the work of Kotler and Keller (2016) and Lynch and de Chernatony (2004), who highlight the pivotal role of emotional appeals in fostering customer trust, loyalty, and differentiation in competitive markets. Emotional storytelling allows brands to create deeper connections, particularly in B2B contexts, where relationships are often built on trust and credibility.

Advertising Strategies

Survey respondents showed a clear preference for narrowly targeted campaigns (mean rating = 4.43) over broad-reach campaigns (mean rating = 3.00). This preference suggests a focus on immediate lead generation and customer segmentation, which reflects the practical priorities of many B2B marketers. However, it also underscores a potential underestimation of the strategic value of high-reach campaigns. According to Sharp (2010) and Binet and Field (2017), broad-reach campaigns play a critical role in building brand awareness and mental availability, ensuring that brands stay "top-of-mind" for future buyers who may not yet be in the market.

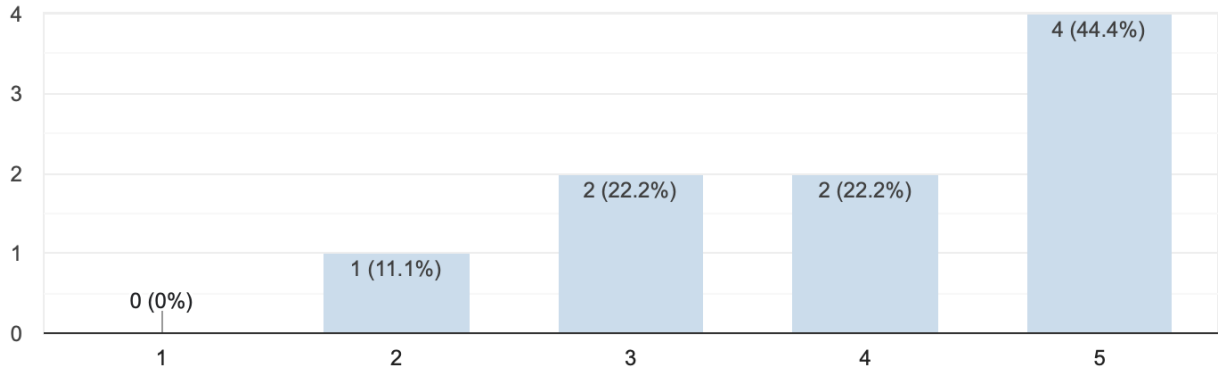


Chart 1: Perceived Effectiveness of Narrowly Targeted Campaigns

Source: Survey conducted by the author.

This finding aligns with the 95-5 Rule, which posits that only 5% of buyers are “in-market” at any given time, while the remaining 95% are “out-market” and will purchase a product or service at a later date (Hollis, 2023). While lead generation effectively captures demand from the 5% of active buyers, it falls short in creating demand among the broader 95% of potential buyers. Broad-reach campaigns, by targeting this larger “out-market” segment, establish the foundation for future demand and contribute to sustained brand growth.

Although narrowly targeted campaigns offer precision and efficiency in reaching specific audiences, the survey results highlight the need for a more balanced approach. By integrating broad-reach strategies with targeted efforts, marketers can optimize both short-term sales activation and long-term brand-building objectives. This dual approach aligns with evidence-based frameworks emphasizing sustainable marketing impact and ensures that brands are positioned for both immediate and future success.

Thought

Leadership

Thought leadership content received a high effectiveness rating (mean rating = 4.43) in the survey.

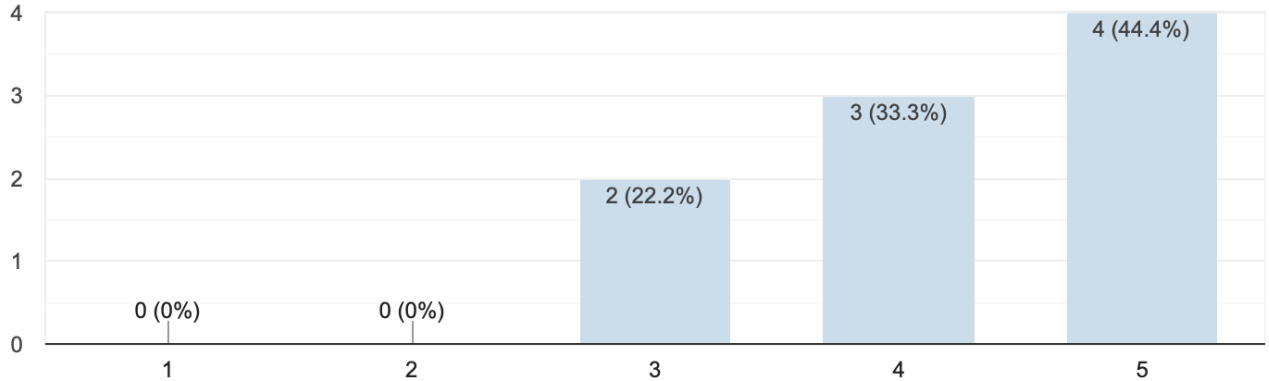


Chart 2: Perceived Effectiveness of Thought Leadership Content

Source: Survey conducted by the author.

This finding supports Pulizzi's (2014) assertion that providing educational and authoritative content enhances credibility and fosters trust in B2B markets. By positioning organizations as industry experts, thought leadership not only builds brand authority but also drives meaningful engagement with decision-makers. However, the effectiveness of thought leadership relies on its relevance and alignment with the needs of the target audience, as highlighted in Forrester's (2020) research. This underscores the importance of strategic planning and audience insights in developing impactful thought leadership campaigns.

Word-of-Mouth

Referrals

Referrals and testimonials were rated even higher (mean rating = 4.78), reflecting their significant influence on purchasing decisions.

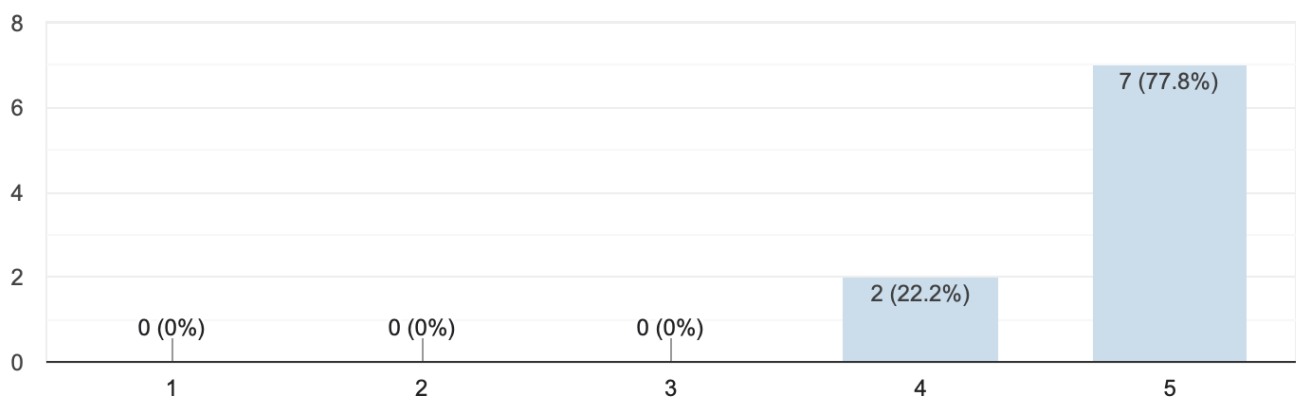


Chart 3: Perceived Effectiveness of word-of-mouth referrals and testimonials

Source: Survey conducted by the author.

This aligns with Keller and Fay's (2012) findings that advocacy-driven strategies, such as client referrals and recommendations, are powerful tools for building trust and fostering engagement. By leveraging customer satisfaction and positive experiences, brands can create a ripple effect of trust within their networks, amplifying their reputation and reach. The high ratings for word-of-mouth referrals emphasize the need for structured testimonial programs and advocacy campaigns that capitalize on the credibility of peer recommendations. These strategies not only drive immediate conversions but also contribute to long-term brand loyalty.

Budget Allocation and Strategic Priorities

When asked to allocate a hypothetical \$50,000 marketing budget, 57.1% of survey respondents prioritized sales activation over brand-building initiatives. Interestingly, the same proportion highlighted brand awareness as a key campaign objective, revealing a disconnect between stated goals and resource allocation. This paradox underscores a common misalignment in B2B marketing, where short-term gains are often prioritized at the expense of long-term brand growth.

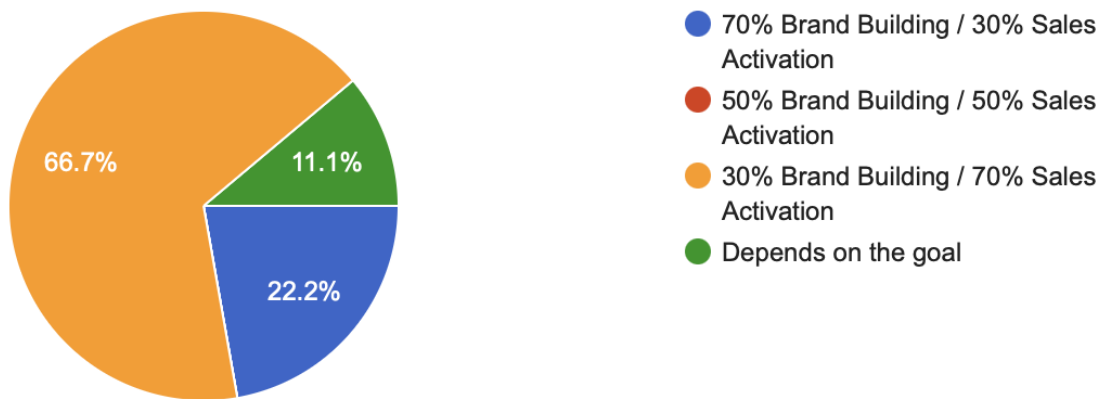


Chart 3: Preferred Allocation of Marketing Budget Between Brand Building and Sales Activation

Source: Survey conducted by the author.

This imbalance deviates from the 60/40 rule proposed by Binet and Field (2017), which emphasizes the importance of dedicating 60% of marketing investment to brand-building efforts and 40% to sales activation. Their research demonstrates that long-term brand-building initiatives foster emotional connections and mental availability, ultimately driving sustainable growth and enhancing the efficiency of sales activation. The survey findings suggest that many marketers may not fully appreciate this complementary relationship between brand equity and immediate sales outcomes.

Sharp's (2010) framework on mental availability further supports this perspective, emphasizing that brand-building efforts improve buyer recall and readiness, especially among out-market customers. By underinvesting in brand-building, marketers risk limiting their ability to create a lasting presence in the minds of potential buyers, thereby reducing the effectiveness of their sales activation strategies.

Brand Awareness and Mental Availability

The survey results reveal that respondents assigned moderate importance to brand awareness, with a mean rating of 3.71, and even lower importance to mental availability, which scored a mean rating of 2.86.

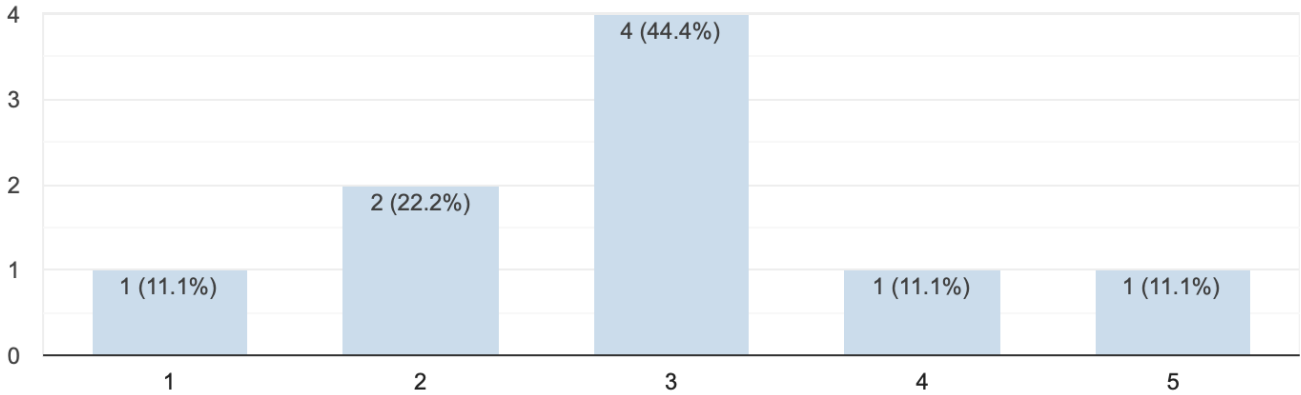


Chart 4: Respondent's Focus on Creating Mental Availability (Brand Recall)

Source: Survey conducted by the author.

These findings reflect a potential gap in understanding the critical role of mental availability in driving buyer readiness and long-term brand growth, as emphasized by Sharp (2010) and Romaniuk and Sharp (2016). Mental availability, defined as a brand's ability to come to mind easily in buying situations, is a foundational element of sustained market performance, yet it appears to be undervalued in B2B marketing strategies.

The moderate emphasis on brand awareness suggests some recognition of its value, but the lack of stronger ratings points to a prevailing misconception that branding efforts yield less tangible outcomes compared to short-term sales activation tactics. This misconception is consistent with the view that branding does not directly influence immediate revenue, overshadowing its role in creating future demand and ensuring the brand remains "top-of-mind" for buyers not currently in the market.

Sharp's (2010) research underscores the long-term benefits of building mental availability, highlighting that brands with greater mental availability are more likely to be considered during purchase decisions, even in competitive environments. Furthermore, Binet and Field's (2017) findings demonstrate that effective branding not only drives awareness but also enhances the efficiency of sales activations, as buyers already familiar with a brand are more likely to convert.

The survey outcomes suggest a critical need for education and alignment in B2B marketing approaches to balance short-term sales priorities with long-term brand-building efforts. By prioritizing brand

awareness and mental availability, marketers can create a robust foundation for future growth, ensuring their brand is readily recalled when buyers enter the decision-making process.

Short-term vs Long term

The survey findings highlight a pronounced focus on short-term sales activations, with 50% of respondents allocating more than 70% of their marketing budgets to these efforts.

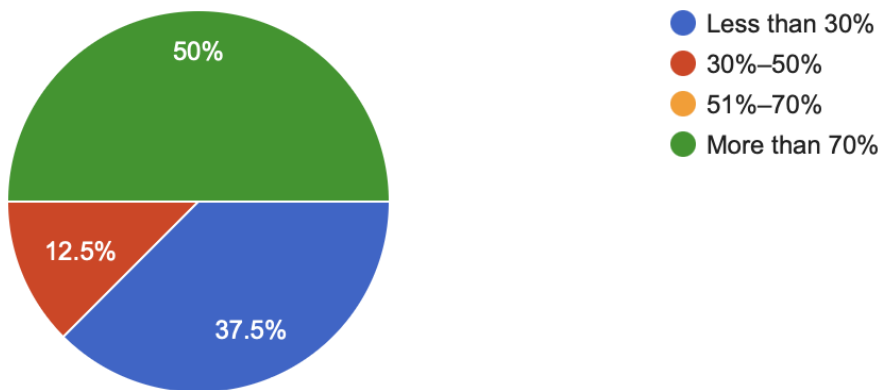


Chart 3: Preferred Allocation of Marketing Budget Between Brand Building and Sales Activation

Source: Survey conducted by the author.

In contrast, long-term brand-building campaigns receive considerably less emphasis, with 50% allocating less than 30% of their budgets to this area. This skewed allocation underscores a common challenge in B2B marketing: prioritizing immediate outcomes at the expense of sustainable growth. Sharp's (2010) research on mental availability emphasizes that strong brand equity not only attracts more leads but also enhances the efficiency and effectiveness of lead generation efforts. Furthermore, Binet and Field's (2017) 60/40 rule underscores the importance of balancing long-term brand-building with short-term

sales activation, as the former creates lasting mental availability and demand among future buyers. The current budget distribution indicates an opportunity for marketers to realign their strategies, recognizing that investments in brand building can amplify the impact of sales activations, creating a more efficient and sustainable marketing framework. By fostering brand awareness and increasing mental availability, businesses can achieve not only higher lead volumes but also improved lead quality, resulting in more cost-effective customer acquisition over time.

CHAPTER 5. EVIDENCE-BASED FRAMEWORK FOR EFFECTIVE B2B MARKETING STRATEGIES

This chapter synthesizes established research to outline an evidence-based framework for effective B2B marketing strategies. It addresses gaps identified in the survey results and aligns practical marketing practices with proven methodologies for sustainable brand growth. By cross-referencing key survey findings with literature, this chapter provides actionable recommendations to help marketers integrate short-term and long-term strategies.

Prioritizing the 60/40 Rule for Sustainable Growth

Binet and Field's (2017) research on marketing effectiveness underscores the importance of a balanced approach to resource allocation in marketing. Their widely recognized 60/40 rule advocates dedicating 60% of marketing budgets to long-term brand-building initiatives and 40% to short-term sales activation. This framework is pivotal for fostering sustainable growth, as brand-building activities create emotional connections, enhance mental availability, and establish a foundation that amplifies the efficiency of sales activation efforts.

However, the survey findings reveal a significant deviation from this principle, with 57.1% of respondents prioritizing sales activation over brand-building. This overemphasis on immediate outcomes reflects a prevalent tendency among marketers to undervalue the compounding benefits of long-term strategies. Such an approach risks neglecting the essential role of brand-building in ensuring consistent demand and reducing price sensitivity over time.

Recent research further validates the need for balance. Long-term brand-building campaigns not only generate demand among “out-market” buyers but also strengthen mental availability—making brands more likely to be considered when buyers enter the market (Hollis, 2023). Conversely, excessive focus

on short-term activation can lead to diminishing returns, as these efforts rely on the brand equity already established through long-term initiatives. Without sustained investment in brand-building, the pool of potential buyers shrinks, eroding the effectiveness of sales activation over time.

The *B2B Marketing Report (2024)* by LinkedIn and the B2B Institute highlights that while the 60/40 split has been a gold standard in B2C marketing, B2B contexts often see variations due to the distinct nature of longer sales cycles and multi-stakeholder decision-making processes. Despite these differences, the overarching principle of balancing brand-building and activation remains critical for maximizing marketing ROI.

Building Mental Availability and Broad Market Reach

Mental availability, as defined by Sharp (2010), refers to the likelihood of a brand being recalled during purchasing decisions. It is a cornerstone of growth, enabling brands to remain relevant and competitive in a crowded marketplace. Broad-reach campaigns are particularly crucial in fostering this mental availability, as they engage the 95% of buyers who are not currently in-market, ensuring that brands remain top-of-mind when buyers transition into the market and are ready to make purchasing decisions (Hollis, 2023).

Recent research underscores the direct impact of branding on bottom-funnel activities such as lead generation and conversion campaigns. For example, LinkedIn data shows that audiences exposed to brand-oriented campaigns before seeing conversion messages are 2.3 times more likely to convert (Newstead, 2021). This demonstrates the importance of using branding to "warm up" potential buyers, thereby enhancing the efficiency and ROI of demand-generation efforts. Strong branding not only drives immediate results but also creates a lasting ripple effect, influencing long-term buyer behaviors and laying the foundation for sustained sales.

The significance of mental availability becomes even more apparent when considering the buyer's "Day 1 List"—the predefined shortlist of brands they have in mind when entering the market. A Bain and Google survey revealed that 86% of B2B buyers begin their purchasing journey with a specific set of brands, and 92% of the time, the chosen brand is from this initial list. Buyers typically consider only 2 to 3 brands, meaning that those not on this shortlist have little to no chance of being selected (Newstead, 2021).

Being widely known within the buyer group also functions as a form of social proof, heavily influencing purchasing decisions. A forthcoming study by B2Bi, Bain & Company, and Newton X (2024) highlights this dynamic, finding that 81% of B2B buyers reported that at the start of the purchase process, "everyone" or "almost everyone" knew the brand that was eventually chosen. In contrast, only 4% said their company purchased a product known solely by the recommending function. This underscores the critical role of mental availability and broad brand recognition in shaping decision-making processes and driving business outcomes. Brands that invest in building their reputation and fostering awareness across buyer groups are better positioned to secure a spot on the vital "Day 1 List" of consideration.

To effectively address these dynamics, B2B marketers must invest in both broad-reach campaigns and distinctive brand-building strategies. These initiatives should aim to embed the brand in relevant memory structures and associate it with key category entry points. Such associations ensure the brand is top-of-mind during critical purchasing moments, significantly increasing its chances of being shortlisted and ultimately chosen.

Incorporating strong branding practices into all marketing activities—whether through long-term brand equity campaigns or short-term conversion efforts—can significantly enhance marketing ROI. Better branding not only supports immediate sales objectives but also strengthens a company's financial performance by driving revenue growth, expanding margins, and mitigating risks. Ultimately, building mental availability ensures that a brand remains visible, relevant, and competitive in both current and future market contexts.

Balancing Emotional and Rational Messaging

Emotional storytelling emerged as the most effective marketing approach in the survey, achieving a mean effectiveness rating of 4.86. This result aligns with research by Kotler and Keller (2016), which underscores the power of emotional appeals in fostering trust and loyalty among buyers, and Lynch and de Chernatony (2004), who highlight the ability of emotional messaging to differentiate brands and create meaningful connections. Emotional storytelling helps brands build relationships by evoking feelings that resonate with audiences, particularly in B2B contexts, where trust is a critical driver of decision-making.

However, while emotions play a pivotal role, the literature highlights the complementary importance of rational messaging. Heath (2012) emphasizes that rational elements are essential for multi-stakeholder decision-making, providing the logical justification needed to support purchasing decisions. In B2B environments, where decisions often involve complex approval processes and financial scrutiny, rational messaging ensures that emotional appeals are anchored in practical, tangible benefits.

Empirical research further supports the effectiveness of emotional messaging in overcoming the brain's natural filtering mechanisms. Humans are naturally drawn to familiar and emotionally resonant stimuli—things that feel safe, trigger memories, or evoke positive emotions. Logical arguments, such as product features or purely rational benefits, are less likely to penetrate the brain's subconscious decision-making filters. Professor Jenni Romaniuk's study on response bias in advertising awareness reveals that brand users are twice as likely to notice advertising for brands they already use, a phenomenon rooted in mental availability (Romaniuk & Wight, 2009). This underscores the importance of cultivating a well-known and emotionally familiar brand to ensure that marketing messages reach their intended audience.

The key to effective communication lies in integrating emotional resonance with rational clarity. Storytelling serves as a powerful tool to engage audiences emotionally, creating a narrative that inspires trust and captures attention. However, to address organizational buyer motivations and satisfy the analytical needs of stakeholders, these emotional narratives must be supported by clear, rational benefits. For instance, a campaign that highlights the innovative features of a product should also showcase its measurable impact on efficiency, cost savings, or scalability.

To achieve this balance, B2B marketers should develop messaging strategies that cater to both the emotional and rational dimensions of their target audiences. Emotional messaging can create a lasting impression, while rational elements provide the credibility and justification needed to drive action. This dual approach ensures that campaigns resonate across diverse buyer personas, from decision-makers who value trust and relationships to analysts who focus on data and outcomes.

By incorporating a balance of emotional and rational messaging, brands can effectively connect with audiences on multiple levels. Emotional appeals ensure the message gets through the brain's subconscious filters, while rational arguments satisfy conscious decision-making processes. Ultimately, this integrated approach enhances campaign effectiveness, builds a holistic brand perception, and ensures relevance and impact in a competitive market landscape.

Leveraging Thought Leadership and Advocacy

Thought leadership and advocacy are foundational strategies in B2B marketing, significantly influencing decision-making and brand credibility. Survey findings highlight the effectiveness of thought leadership content—such as whitepapers, webinars, and industry reports—which achieved a mean effectiveness rating of 4.43. This supports Pulizzi's (2014) argument that high-value educational content positions brands as trusted authorities, fostering deeper relationships with potential and existing clients. Such content not only builds credibility but also differentiates brands in competitive markets by demonstrating expertise and a forward-thinking approach.

Advocacy, particularly through word-of-mouth referrals, amplifies these effects, with the survey revealing a mean effectiveness rating of 4.71. This aligns with Keller and Fay's (2012) findings that referrals and recommendations are among the most influential drivers of purchasing decisions in B2B contexts. Word-of-mouth advocacy drives sales directly and enhances advertising effectiveness. Research by Keller and Fay (2009) revealed that 25% of brand-related conversations reference advertisements, significantly increasing the likelihood of recommendations to buy. Their 2012 findings further demonstrated that word-of-mouth conversations, whether sparked by advertising or organic interactions, create a "social voice" that bridges the gap between awareness and purchase decisions, driving measurable sales outcomes.

The interplay between thought leadership and advocacy lies in their shared ability to create meaningful connections. Thought leadership establishes authority by addressing industry challenges and providing actionable insights, while advocacy builds on this foundation, validating the brand's value through client endorsements. Together, these strategies enhance a brand's reputation and foster loyalty, ensuring it remains top-of-mind for future purchasing decisions. Advocacy-driven campaigns leverage both online and offline interactions to maximize impact, with offline conversations accounting for 75% of brand-related discussions (Keller & Fay, 2012).

Structured advocacy programs are critical to amplifying these effects. These initiatives should include mechanisms for collecting and showcasing client testimonials, case studies, and referrals. Additionally, creating opportunities for customer engagement, such as appreciation events and co-branded content, fosters long-term relationships that encourage voluntary advocacy. These programs transform satisfied clients into brand ambassadors, enhancing credibility and trust within their networks.

Ultimately, thought leadership and advocacy are not standalone strategies but integral components of a comprehensive marketing approach. By combining authoritative content with structured advocacy initiatives, B2B brands can enhance visibility, build trust, and drive sustainable growth. As Keller and Fay (2012) assert, fostering conversations and leveraging word-of-mouth are critical for creating meaningful consumer engagement. By integrating these elements, brands ensure their relevance and competitive edge in an ever-evolving market.

Integrating Long-Term and Short-Term Goals

Binet and Field's (2017) 60/40 rule highlights the importance of allocating 60% of marketing resources to long-term brand-building efforts and 40% to short-term sales activation. This balance is critical for fostering sustainable growth, as brand-building efforts create mental availability and emotional connections that enhance the efficiency of short-term sales campaigns. However, the survey findings revealed an overemphasis on short-term goals like lead generation, reflecting a misalignment with this evidence-based framework. This skew risks limiting the long-term effectiveness of marketing strategies and undermining sustainable brand growth.

One of the key challenges marketers face is the pressure to deliver immediate results. Drawing on insights from Walter Mischel's renowned *Marshmallow Test*, self-control and patience are pivotal in achieving long-term competitive advantage (Mischel, 2014). Just as children in the experiment who delayed gratification received greater rewards, marketers who resist the temptation to pursue short-term wins in favor of consistent brand-building reap greater long-term benefits. The Spencer Stuart CMO Tenure Study (2024) illustrates that many marketing leaders feel compelled to signal immediate impact, often through rebranding or frequent campaign refreshes. However, companies like AWS, Google, and Microsoft have shown that maintaining consistency in their brand assets over decades compounds their brand value, leveraging the human brain's preference for the familiar and the safe (Spencer Stuart, 2024).

Consistency is not just an operational choice but a strategic advantage. Distinctive Brand Assets (DBAs) play a crucial role in embedding a brand into audience memory. These assets—logos, colors, slogans, and other visual or auditory cues—enable brands to stand out and be instantly recognized. Research by Romaniuk and Sharp (2016) underscores that DBAs increase mental availability, ensuring the brand remains top-of-mind during critical purchasing moments. Effective marketers resist the temptation to

“tinker” with their brand unnecessarily, focusing instead on leveraging and strengthening existing assets to build long-term equity (Romaniuk & Sharp, 2016).

Moreover, branding is not a luxury reserved for large budgets or high-profile campaigns; it is an essential component of all marketing activities, including bottom-funnel efforts. Better branding enhances the effectiveness of conversion campaigns by maximizing their impact on the 90%+ of the audience who do not immediately engage. Research on LinkedIn shows that branding-oriented campaigns significantly boost conversion rates when paired with direct-response messaging, demonstrating the interplay between long-term branding and short-term sales (Newstead, 2021).

To optimize both immediate and sustained outcomes, marketers should adopt a deliberate, disciplined approach to branding. This involves prioritizing the consistent use of DBAs, aligning marketing activities with long-term strategic goals, and resisting the urge to make superficial changes that could dilute brand equity. Performance dashboards can help marketers measure the effectiveness of their efforts, tracking both short-term KPIs like conversion rates and long-term indicators such as brand recall and share of voice.

In the competitive B2B landscape, integrating long-term and short-term goals is not merely a best practice but a necessity. Marketers who focus on building strong, consistent brands set the stage for profitable growth, enabling their companies to thrive in both the present and the future. By balancing immediate sales activation with sustained brand-building efforts, B2B brands can achieve a competitive advantage that endures beyond short-term gains, ensuring lasting relevance and impact in the marketplace.

CHAPTER 6. SALESFORCE CASE STUDY

Salesforce, a global leader in cloud-based customer relationship management (CRM) solutions, exemplifies the successful application of evidence-based marketing frameworks. This chapter explores how Salesforce integrates short-term sales activation and long-term brand-building strategies to maintain its position as a thought leader in the technology sector. By linking Salesforce’s marketing efforts to theoretical insights from earlier chapters, this case study demonstrates the practical application of concepts such as mental availability, thought leadership, and emotional storytelling.

Reimagining Brand Building: The Trailblazer Campaign

Salesforce's marketing journey began with a pivotal realization: awareness is not enough. While Salesforce had achieved significant market recognition—visible through its iconic headquarters, presence on CNBC, and the globally renowned "Dreamforce" event—many buyers failed to understand what the company truly offered. This lack of situational awareness presented a significant barrier to growth. Colin Fleming, SVP of Global Brands, explained, "We discovered most people had heard of Salesforce, but few people knew how we could help their business grow. We actually had an awareness problem" (Weinberg, 2021).

To address this gap, Salesforce prioritized building **mental availability**—ensuring the brand remained top-of-mind across various buying situations. This shift required not just informing potential buyers but creating meaningful, memorable brand associations.

Building Availability, Not Just Awareness

A cornerstone of Salesforce's strategy was the **Trailblazer Campaign**, launched in 2019. This campaign leveraged the RMB (Reach, Message, Brand) framework, as outlined by the Ehrenberg-Bass Institute (Weinberg, 2021):

1. **Reach:** Salesforce employed broad segmentation to target all potential CRM buyers, spanning enterprises and small businesses alike.
2. **Message:** Creative messaging linked Salesforce's solutions to specific business challenges, addressing several category entry points.
3. **Brand:** The campaign incorporated distinctive brand assets—such as the Astro character—and ensured consistency across all channels.

This approach aligned with Sharp's (2010) emphasis on mental availability as a driver of brand growth. By fostering recall in critical buying moments, Salesforce ensured its relevance not only to in-market buyers but also to the 95% of buyers who are out-of-market at any given time.

Emotional Storytelling and Brand Distinctiveness

Salesforce's ability to humanize its brand through emotional storytelling was a defining element of the Trailblazer Campaign. Characters like Astro and Codey served as metaphors for Salesforce's mission of connecting companies with customers. Initially introduced in Trailhead, Salesforce's online learning environment, these characters gained popularity among users and evolved into central elements of the brand's storytelling efforts (Weinberg, 2021).

Astro and friends helped Salesforce convey technical solutions in an engaging, relatable way, creating emotional connections with audiences. As Fleming noted, “Astro and friends help us tell stories about our products and create an emotional connection with our customers” (Weinberg, 2021). This approach aligns with Kotler and Keller’s (2016) findings on the importance of emotional resonance in fostering customer loyalty.

Consistency Across Channels

Salesforce ensured brand consistency through a unified design system. This "total merchandising strategy" mirrored tactics employed by consumer brands like Disney, with Astro and other brand assets featured across TV ads, LinkedIn campaigns, and Dreamforce events (Weinberg, 2021). By maintaining cohesive branding, Salesforce reinforced its distinctiveness and amplified its long-term brand effects.

Thought Leadership and Dreamforce

Salesforce’s commitment to thought leadership is exemplified by its flagship event, **Dreamforce**. This annual gathering combines brand-building with direct sales opportunities, featuring keynote speeches, product demonstrations, and community-building activities. Dreamforce illustrates Salesforce’s ability to integrate **mental availability** with **physical availability**, creating a cohesive ecosystem for customer engagement.

In addition to Dreamforce, Salesforce invests heavily in content marketing. Its "State Of" reports provide deep insights into various domains, such as customer service and analytics. These reports started as experimental initiatives but grew into anchor franchises, reinforcing Salesforce’s expertise while enabling sales teams with valuable resources (Weinberg, 2021).

Measuring Success: A Data-Driven Approach

Salesforce rigorously measures its marketing impact using metrics such as customer acquisition cost (CAC), customer lifetime value (CLV), and return on investment (ROI). These metrics not only validate its marketing strategies but also secure internal buy-in for ongoing investments in brand-building efforts (Weinberg, 2021).

Lessons from Salesforce

Salesforce’s success highlights several critical lessons for B2B marketers:

1. **Mental Availability Drives Growth:** Awareness alone does not suffice; brands must ensure they are easily recalled in buying situations (Sharp, 2010).
2. **Consistency Amplifies Impact:** Unified messaging and design systems enhance brand recognition over time.
3. **Emotional Storytelling Builds Loyalty:** Connecting with audiences on a human level fosters trust and long-term engagement (Kotler & Keller, 2016).
4. **Balance Short- and Long-Term Goals:** Salesforce's integration of sales activation and brand-building demonstrates the synergistic potential of combining these strategies (Binet & Field, 2017).

Conclusion

Salesforce's marketing success, exemplified by the Trailblazer Campaign and Dreamforce, underscores the importance of aligning mental availability, emotional storytelling, and consistent branding. By addressing gaps in situational awareness and fostering customer connections, Salesforce has set a new standard for B2B marketing excellence. This case study validates the theoretical frameworks discussed in earlier chapters and offers actionable insights for marketers striving to achieve sustainable growth.

CHAPTER 7. CONCLUSIONS

This study underscores the challenges B2B marketers face in aligning perceived effective practices with scientifically validated strategies. By integrating insights from a structured survey, literature review, and a case study of Salesforce, the research identifies key misalignments and provides a roadmap for bridging the gap between short-term sales activation and long-term brand-building efforts.

The findings reveal a consistent overemphasis on short-term tactics, such as lead generation, often at the expense of strategic investments in brand equity. While marketers recognize the importance of brand awareness, they frequently underinvest in initiatives that cultivate mental availability, emotional resonance, and trust—critical components of long-term brand success. This imbalance stems from a tendency to prioritize immediate results over the enduring benefits of brand-building efforts. In contrast, evidence from frameworks like the 60/40 rule (Binet & Field, 2017) and mental availability principles (Sharp, 2010) demonstrates the importance of integrating these two dimensions for sustainable growth.

Salesforce's approach serves as a benchmark for harmonizing these priorities. By leveraging thought leadership, emotional storytelling, and consistent branding, Salesforce not only builds lasting relationships but also positions itself effectively across different buyer journeys. The Trailblazer campaign highlights the power of integrating broad-reach strategies with targeted efforts, ensuring relevance for out-of-market and in-market audiences alike. This comprehensive approach underscores the need for B2B marketers to move beyond narrow, short-term objectives and embrace holistic strategies that create enduring market presence.

To address these challenges, this research proposes a framework centered on three core pillars:

1. **Strategic Balance**

Allocate marketing resources based on the 60/40 rule, dedicating 60% to brand-building and 40% to sales activation. This balance ensures short-term gains are supported by long-term brand equity.

2. **Integrated Metrics**

Employ robust analytics to measure the impact of both brand-building and sales activation. Metrics such as customer acquisition cost (CAC), customer lifetime value (CLV), and mental availability indices should guide resource allocation and demonstrate ROI to stakeholders.

3. Customer-Centric Engagement

Combine emotional storytelling with rational messaging to address both the emotional and functional needs of organizational buyers. Formalize advocacy programs and thought leadership initiatives to position the brand as a trusted authority.

While this research provides actionable insights, it also highlights areas for further investigation. Future studies could explore the role of emerging technologies, such as artificial intelligence and predictive analytics, in optimizing resource allocation between brand-building and sales activation. Additionally, examining the effectiveness of these strategies across different industries or cultural contexts would enhance their applicability and relevance. Finally, longitudinal studies that track the compounding effects of brand-building investments over time would provide deeper insights into the long-term impacts of these practices.

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APPENDIX A

The survey questionnaire used in this capstone study was designed to assess B2B marketing managers' perceptions of effective marketing practices, focusing on brand-building and sales activation strategies. This questionnaire was conducted using Google Forms. The responses were analyzed and cross-referenced with established literature and case study data to derive actionable insights for B2B marketing strategies.

Below is the structured format of the questionnaire:

Marketing Tactics Survey

1. Role in the Organization

- Marketing Manager
- Sales Manager
- Chief Marketing Officer (CMO)
- Chief Sales Officer (CSO)
- Business Development Manager
- Other (please specify)

2. Experience in Marketing or Sales

- Less than 3 years
- 3–5 years
- 6–10 years
- More than 10 years

3. Industry of the Company

- Professional Services (Agency, Consultancy)
- SaaS
- Cybersecurity
- Manufacturing/Industrial
- Technology Consultancy
- Other (please specify)

4. Primary Marketing Goals

- Lead Generation
- Building Brand Awareness

- Customer Retention
 - Other (please specify)
- 5. Involvement in Marketing Strategy Decisions**
- I make strategic decisions.
 - I influence strategic decisions.
 - I implement strategies.
 - I am not involved in marketing strategy.

Section 2: Perceived Effectiveness of Marketing Approaches

Respondents rated the effectiveness of the following on a scale of 1 (Not Effective) to 5 (Very Effective):

6. Emotional storytelling (e.g., highlighting values like trust and innovation)
7. Rational product-focused messaging (e.g., features, pricing, technical details)
8. High-reach advertising campaigns targeting broad audiences
9. Narrowly targeted advertising campaigns targeting specific audiences
10. Activation tactics (e.g., PPC ads, limited-time offers)
11. Thought leadership content (e.g., whitepapers, webinars, industry reports)
12. Encouraging word-of-mouth referrals and testimonials

Section 3: Resource Allocation and Strategic Focus

13. Marketing Budget Allocation

If provided with a \$50,000 marketing budget, how would you allocate funds?

- 70% Brand Building / 30% Sales Activation
- 50% Brand Building / 50% Sales Activation
- 30% Brand Building / 70% Sales Activation
- Other (please specify)

14. Focus on Brand Awareness

Rate the importance of building brand awareness to stay "top-of-mind" for buyers not actively searching for your services.

- Scale: 1 (Not Important) to 5 (Very Important)

15. Focus on Mental Availability

Rate how often your company focuses on creating mental availability (brand recall).

- Scale: 1 (Rarely) to 5 (Always)

16. Campaign Objectives

What percentage of your marketing campaigns focus on short-term sales activations (e.g., lead generation)?

- Less than 30%
- 30%–50%
- 51%–70%
- More than 70%

17. What percentage of your marketing campaigns are focused on long-term goals (e.g., brand awareness)?

- Less than 30%
- 30%–50%
- 51%–70%
- More than 70%

18. In your opinion, which of the following contributes most to your company's marketing growth?

- Consistent use of distinctive brand assets
- High-reach advertising campaigns targeting a broad audience
- Frequent ad exposure to the same audience

Section 4: Marketing Beliefs and Practices

Respondents rated the importance of the following practices on a scale of 1 (Not Important) to 5 (Very Important):

19. Long-term brand-building efforts (e.g., thought leadership, content marketing)
20. Consistent branding across all channels (e.g., unified messaging, visual identity)
21. Product-focused advertising aimed at immediate conversions
22. Short-term tactics like discounts or limited-time offers
23. Word-of-mouth referrals and testimonials
24. Emotional appeals in branding (e.g., storytelling, values like trust)
25. Rational, product-based messaging in B2B branding

26. Tailoring marketing messages to specific buyer personas