



B2B  
MARKETING

NewtonX

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# The Confident B2B Marketer 2026

How Marketing's Most Confident Leaders  
Make a Financial Impact

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JUNE 2026



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# FOREWORD

Dagmara Szulce, EVP, B2B Brand Practice, ANA

B2B marketing is being asked to carry more weight than at any point in recent memory — and it is being scrutinized more closely than ever before.

The macro environment has made that inevitable. Capital is tighter. Buying cycles are longer. Artificial intelligence (AI) is reshaping how buyers research, evaluate, and decide — often before a human seller enters the picture. At the same time, finance leaders now exert a level of influence over marketing investment that few CMOs would have anticipated a decade ago. As a result, the bar for evidence has risen sharply. When it was once sufficient to demonstrate reach, awareness, and pipeline volume, the modern B2B enterprise demands something more rigorous: a defensible account of what each marketing dollar produces, expressed in the financial language used to evaluate every other capital allocation.

This is the context in which B2B marketing operates in 2026 — not diminished, but elevated. Marketing is no longer a supporting function behind sales and product. It is increasingly recognized as a strategic capital allocator — one that shapes market position, accelerates revenue, reduces buyer uncertainty, and builds long-term enterprise value. That recognition, however, is hard-won and fragile. It depends on marketing's ability to speak the language of the boardroom, not just the language of the campaign.

## The Rise of the Confident Marketer

For the past two years, the ANA has partnered with NewtonX to understand what separates the leaders who have earned that recognition from those still working toward it. We call this group Confident Marketers — senior B2B leaders who can measure and defend marketing's financial impact with the rigor finance expects. In 2025, 39 percent of senior B2B marketers met that standard. In 2026, that figure has risen to 59 percent.

That growth is not abstract. It is traceable to a specific set of behaviors — 12, to be precise — that consistently separate Confident Marketers from their less confident peers. The largest gaps between the two groups cluster around four themes: data infrastructure, AI readiness, buyer group enablement, and the clarity of marketing's connection to business outcomes. These are not aspirational priorities. They are operational realities that Confident Marketers have already built into their day-to-day systems.

Consider the data. Forty-four percent of Confident Marketers say their data infrastructure is ready to support AI — compared to just 6 percent of their less confident peers, a gap of 38 percentage points. That is not a technology gap. It is a strategic discipline gap. Confident Marketers did not simply adopt more tools; they did the harder work of integration, rationalization, and semantic consistency that makes AI actionable rather than aspirational.

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The second-largest differentiator is equally instructive: 39 percent of Confident Marketers say marketing frequently helps champions defend purchase decisions internally, compared to 10 percent of less confident peers. This reflects a fundamental shift in how leading B2B marketing organizations think about their role. The buying decision is no longer won in a meeting with a seller. It is won in the rooms marketing never enters — the internal deliberations where a champion must persuade colleagues, neutralize objectors, and hold a coalition together under pressure. Confident Marketers have redesigned their buyer-group strategies around that reality.

Rounding out the top differentiators: Confident Marketers are five times more likely to report a very clear connection between marketing reporting and business outcomes (32 percent versus 5 percent), and 14 times more likely to say marketing significantly reduces uncertainty in complex buying groups (28 percent versus 2 percent). These are not incremental improvements in marketing performance. They are structural advantages — and they compound over time.

### **The View from the Other Side of the Table**

What is new this year is the view from the other side of the table. For the first time, we surveyed 150 B2B finance leaders — the stakeholders who ultimately determine whether marketing is trusted — and asked them the same questions. Their responses are among the most important findings in this report.

They are not hostile to marketing. They are not dismissive of brand. Nor are they skeptical of AI. Yet only 45 percent believe marketing can reliably measure its financial impact, and just 12 percent consider that measurement resilient under pressure. When placed alongside the Confident Marketer data, a striking picture emerges.

Where Confident Marketers report that marketing impact is reliable enough for planning at 83 percent, finance validates that view at only 37 percent — a gap of 46 percentage points. On buyer group enablement, Confident Marketers say they frequently help champions defend purchase decisions at 39 percent; finance sees that happening at 15 percent. On AI, Confident Marketers report that AI has changed a strategic decision in the last 12 months at 42 percent; finance agrees at 21 percent. Across nearly every dimension, the same work is producing different conclusions depending on which side of the table is evaluating it.

There are, however, two places where finance is more generous than marketers are about themselves. Finance is more likely than Confident Marketers to say that creative drives win rate (55 percent versus 46 percent) and that brand is treated as a business asset very often (15 percent versus 8 percent). These are not minor footnotes. They suggest that finance is not the adversary many marketers assume — and that there is more common ground available than the perception divide might imply.

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The gap between what marketers believe they are proving and what finance is willing to put into a forecast is real. But it is not primarily a measurement problem. It is a translation problem. Finance's single greatest barrier to trusting marketing, in their own words, is the lack of shared definitions and cross-functional alignment — what we call the Vocabulary Gap. When pipeline, attribution, and impact mean different things on each side of the table, the same results produce different verdicts. Closing that gap is the most immediate and highest-leverage move available to most B2B marketing leaders today.

### **A Replicable Operating Model**

We offer this research as a practical playbook. The Confident Marketer is not a rare archetype to admire from a distance. It is a replicable operating model — built through deliberate choices in data infrastructure, brand investment, buyer enablement, sales alignment, and measurement discipline. These are moves that any senior B2B marketing leader can begin to implement over the next 12 months.

Brand investment, in particular, warrants attention. Confident Marketers are 22 percentage points more likely than their peers to treat brand as a business asset, and 21 points more likely to have increased brand investment in the last 12 months. Yet finance gives marketing more credit for brand than Confident Marketers claim for themselves. That asymmetry represents an underexploited opening — one where marketing can strengthen its standing with finance not by doing more, but by narrating what it is already doing more effectively.

### **What Remains to Be Built**

There is, however, one critical piece the industry has yet to fully solve. What remains to be built is the causal chain from brand investment today to enterprise value tomorrow. Every Confident Marketer we interviewed identified this as the current limit of what they can prove. Leading indicators can bridge the quarter. Retrospectives can explain the past. But the long-horizon case — the one that would place brand investment on equal footing with every other strategic capital allocation on the balance sheet — remains incomplete.

Year three of this study will begin there.

Until then, the work in front of us is clear: close the Vocabulary Gap, build the data foundations that make AI more than a promise, equip the champions who are winning decisions in rooms we never enter, and keep earning the trust of the finance leaders who are, it turns out, more ready to be convinced than we might have assumed.

The distance between confident and less confident is not talent. It is 12 behaviors. And the gap is closing.

## FOREWORD

### Your Next Move Starts Here

This report is not meant to be read and filed. It is meant to be used. Here is how we encourage ANA members to put it to work immediately.

**This week:** Share the finance perception data with your chief financial officer (CFO) or chief revenue officer before your next budget conversation. The findings on the Vocabulary Gap are among the most actionable in this report — and the most likely to shift the dynamic in that room. You do not need a new measurement framework to start this conversation. You need a shared vocabulary, and this research gives you the language to begin building one.

**This quarter:** Audit your organization against the 12 differentiators. Where does your team stand on data infrastructure for AI? On champion enablement? On the clarity of your connection between marketing reporting and business outcomes? Use the gap analysis not as a scorecard, but as a prioritization tool. The behaviors with the largest gaps between confident and less confident marketers are precisely the areas where focused investment returns the most ground.

**This year:** Commit to closing at least three gaps on the differentiator list — and commit to doing it with finance in the room, not after the fact. The Confident Marketers in this study did not earn trust by producing better reports. They earned it by building shared definitions, shared metrics, and shared accountability with the stakeholders who control the budget. That work is relational before it is analytical.

**For the longer horizon:** Join ANA in building the causal case that the industry still lacks — the one that connects brand investment today to enterprise value tomorrow. We are actively developing the frameworks, communities of practice, and research partnerships that will make that case possible. If you are a senior B2B marketing leader who is ready to work on this problem at the frontier, we want to hear from you.

The Confident Marketer is not a destination. It is a direction. And the 12 behaviors in this report are the most reliable map we have found for getting there.

To connect with ANA's B2B practice, access member resources, or join the conversation, visit [ANA.net/B2B](https://ana.net/B2B).

## BACKGROUND

Last year, we identified the **Confident B2B Marketer** and the 39 percent of senior marketing leaders who said they could prove marketing's financial impact, and mapped 12 behaviors that set them apart. The industry's response was clear: the portrait was useful. The playbook was what they needed. This year, we built it.

We ran the quantitative survey again with 202 senior B2B marketing leaders. For the first time, we fielded a parallel survey of 150 CFOs, VPs of finance, and heads of revenue, the leaders who actually decide whether marketing is trusted. And we conducted 23 AI-moderated interviews with Confident Marketers to surface the operating decisions behind the numbers.

Confidence is up — 59 percent of senior B2B marketers now qualify. The more important story is what's underneath the number. Confident Marketers are building the data foundations that make AI useful, investing in brand and reframing it in financial terms finance already understands, moving from lead handoffs to shared pipeline ownership with sales, and equipping the full buying group (human and AI) to close.

Finance and revenue leaders see progress. But only 45 percent say marketing can measure its financial impact, and just 12 percent call that measurement resilient under pressure.

Running beneath all of it is a problem that shows up in nearly every section of this report: marketing, sales, and finance don't share a common language. We call it the "Vocabulary Gap": the absence of shared definitions around pipeline, attribution, and impact. It's not a measurement issue. It's a root cause. When definitions diverge, AI outputs get questioned, data integrations fragment, brand investment gets cut, champions lose internal debates, and forecasts miss. Closing the Vocabulary Gap is one of the clearest things that separates Confident Marketers from everyone else.

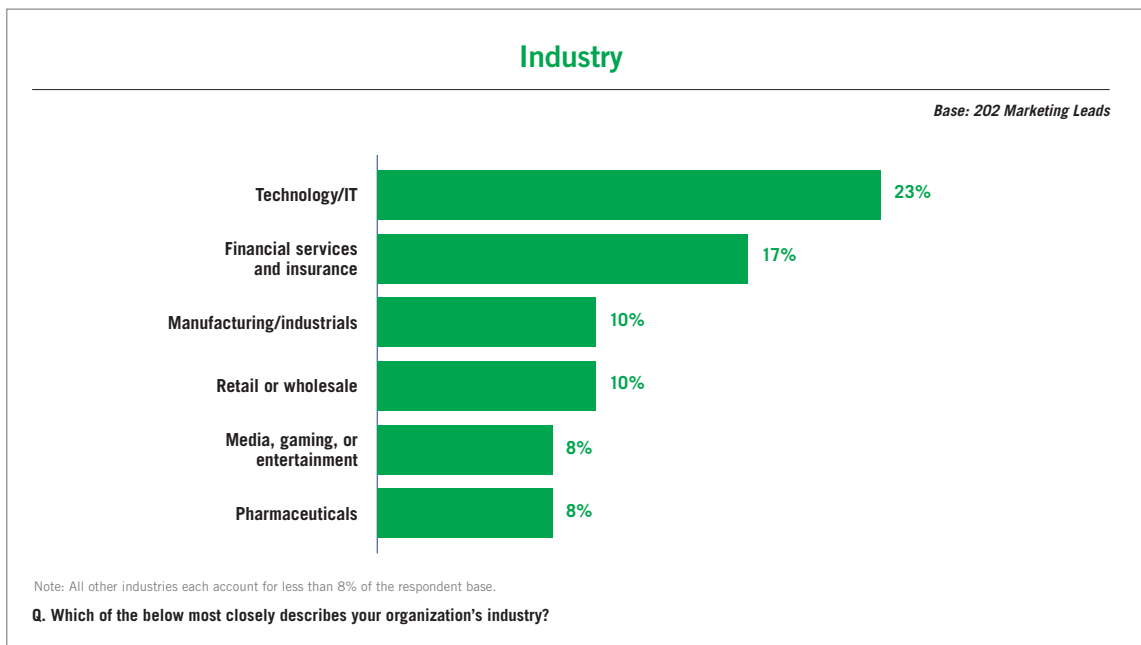
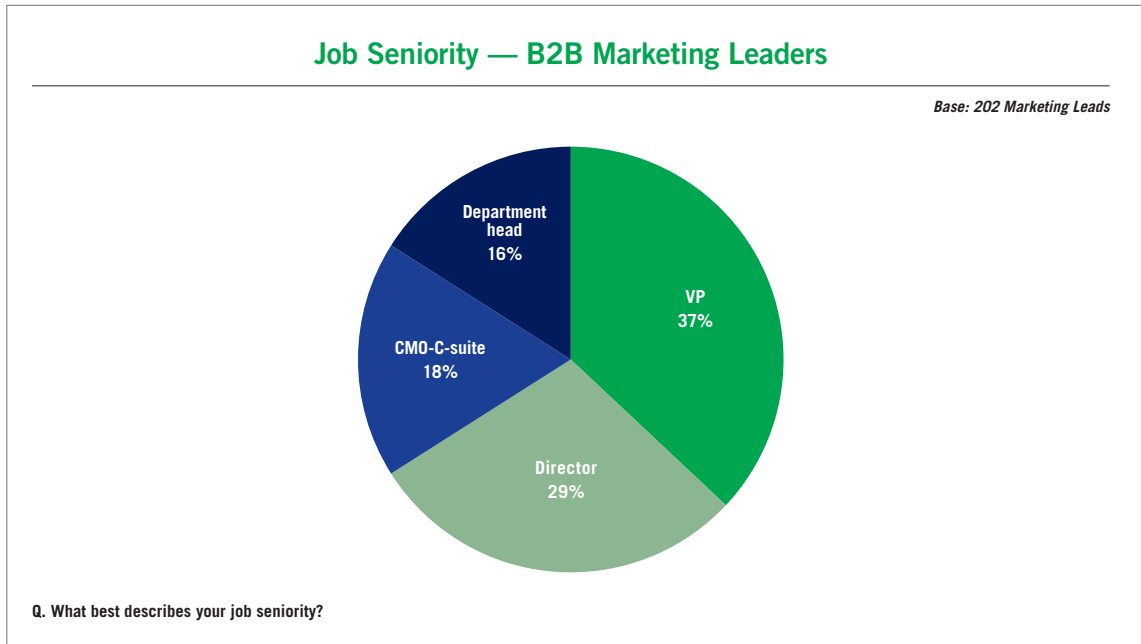
This report is structured around what Confident Marketers are doing right in 2026, and what the finance and revenue perspective tells us is still left to build.

# HOW WE DESIGNED THE RESEARCH

The Confident B2B Marketer 2026 draws on four sources of evidence.

## 1. The B2B Marketer Survey *Quantitative* · N=202

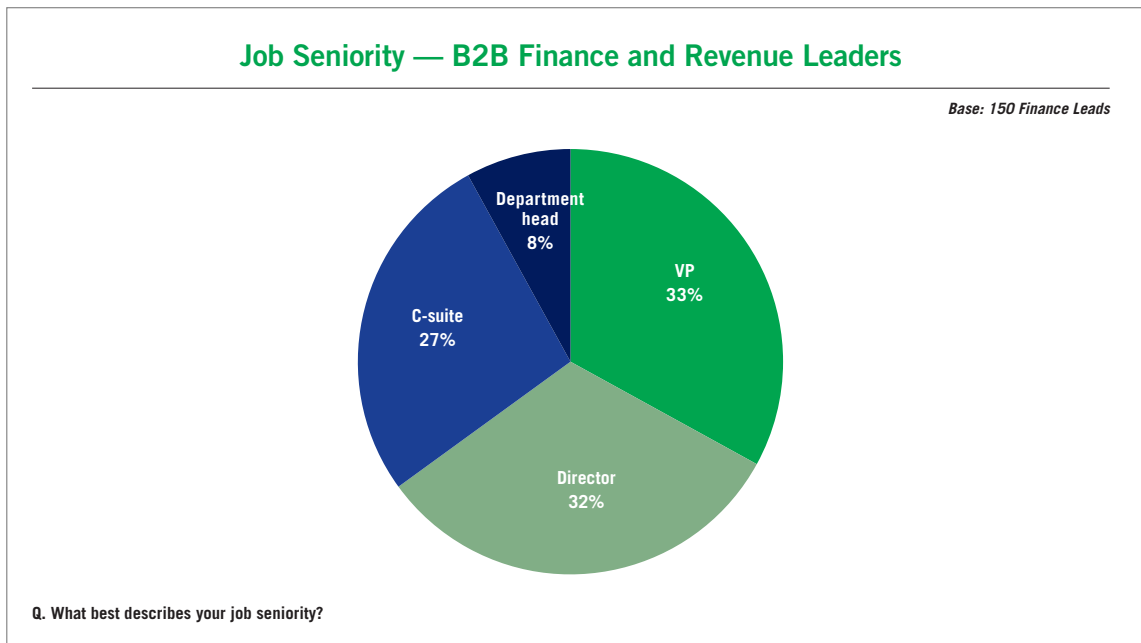
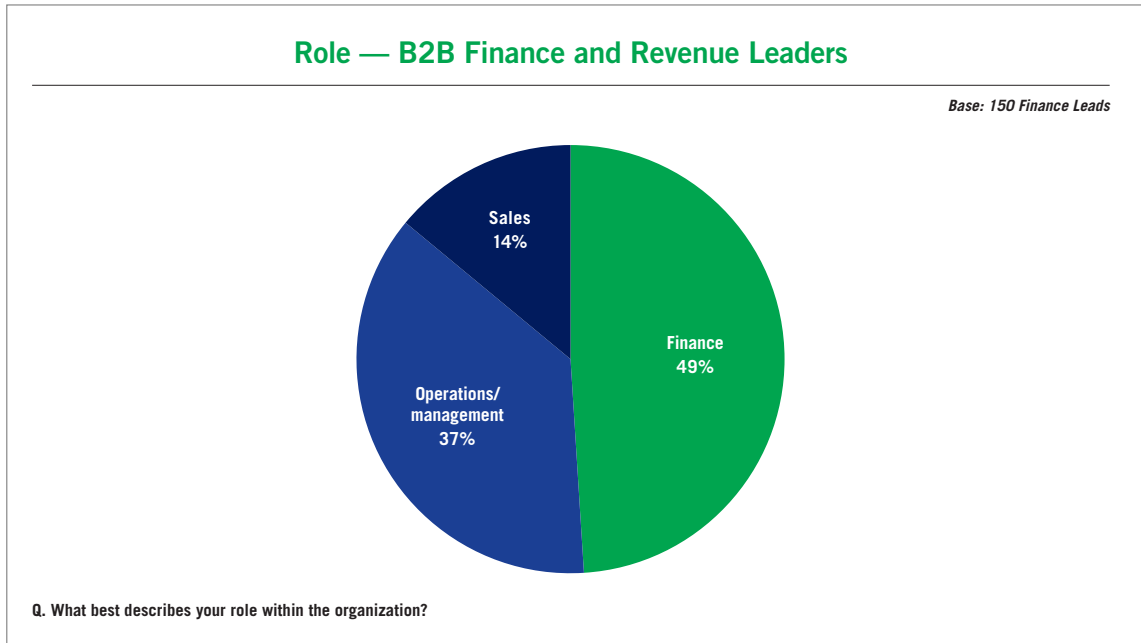
B2B marketing leaders were fielded by NewtonX in April 2026. Participants were vetted through the NewtonX Knowledge Graph: full-time at a U.S. B2B company of 500-plus employees, director-level or above, with decision-making authority over marketing.



## HOW WE DESIGNED THE RESEARCH

### 2. The Finance and Revenue Survey *Quantitative · N=150 · New for 2026*

Participants consisted of CFOs, VPs of finance, heads of revenue and operations, and more in the U.S., and at B2B companies of 500-plus employees, fielded in parallel with the marketer survey.



## HOW WE DESIGNED THE RESEARCH

### **3. Confident Marketer Interviews** *AI-moderated qualitative · N=23 · ~20 minutes each*

Participants consisted of senior B2B marketing leaders — VP through CMO and SVP — who qualified as Confident Marketers in the quantitative survey. All hold cross-functional accountability and budget authority. These interviews were designed for best practice, with every question asked for a specific decision or operating mechanic.

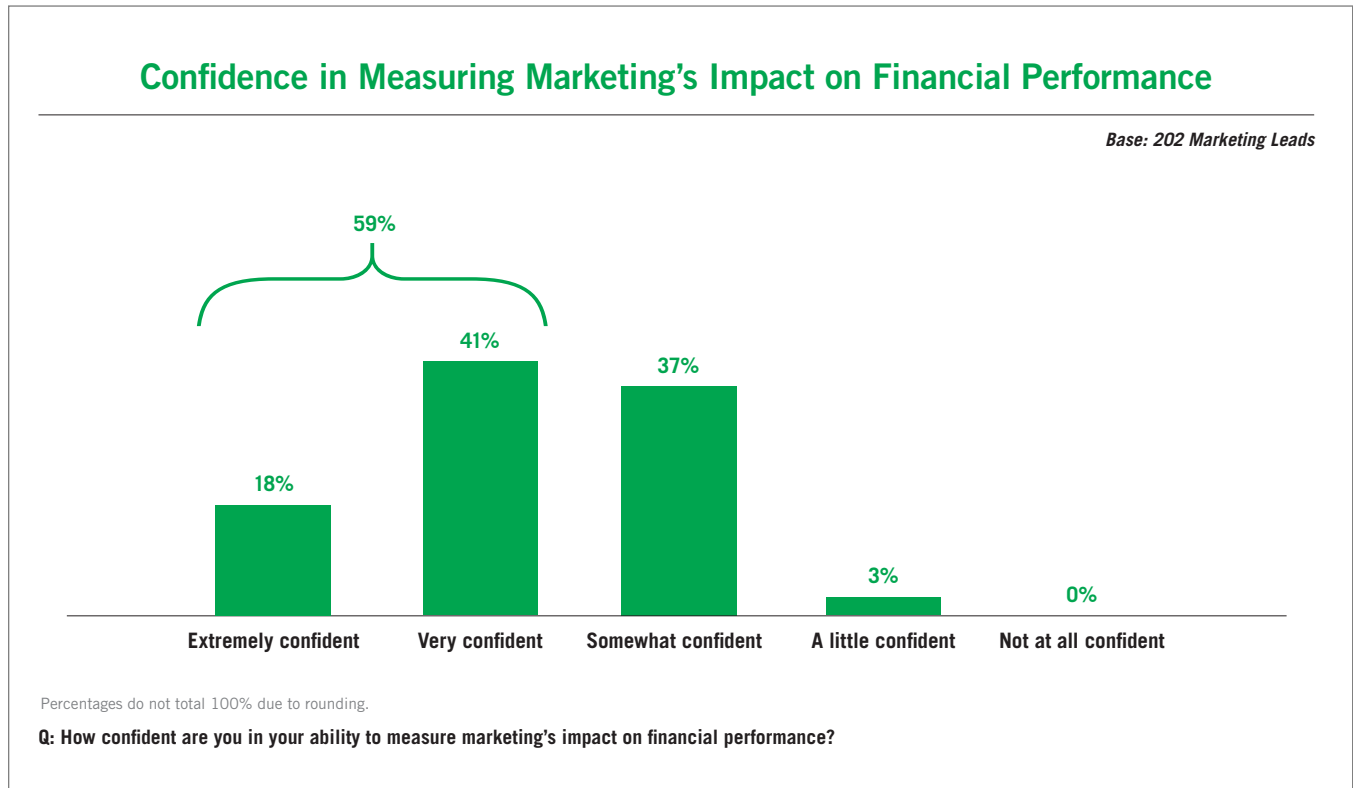
### **4. Finance and Revenue Interviews** *In-depth qualitative · N=8 · ~45 minutes each*

Participants consisted of senior finance and revenue executives who evaluate, approve, or cut marketing investment as part of their core role. The group spans industries and organizational context. Together they represent the full range of finance-marketing dynamics — from deeply skeptical to actively partnered.

# THE CONFIDENT B2B MARKETER

A **Confident Marketer** is a senior B2B marketing leader who is extremely or very confident in their ability to measure marketing's impact on financial performance.

In 2025, 39 percent of senior B2B marketers qualified. In 2026, 59 percent qualify.



And 60 percent of senior B2B marketers say their confidence has improved over the last 12 months. The direction is clear.

But when you ask finance, the picture is different. Only 45 percent of finance and revenue leaders say marketing can measure its financial impact. Only 37 percent say that measurement has been reliable enough to inform planning. And just 12 percent call it resilient under pressure. Confidence is up. Credibility has not kept pace.

This is the confidence inflation risk. A meaningful portion of the new confident cohort appears to be self-assessed and not externally validated. Rising confidence without rising credibility is its own risk signal. It produces budget defenses that feel solid internally but do not hold in the room where resources are actually allocated. The marketers who have closed that gap are the ones this report is built around.

## THE CONFIDENT B2B MARKETER

Confident Marketers built their AI foundation. They are greater than seven times more likely than their less confident peers to say their data infrastructure is ready to support AI, the largest single behavioral gap in the study. The AI trust gap, in their own words, is a data readiness gap in disguise. They solved the data first.

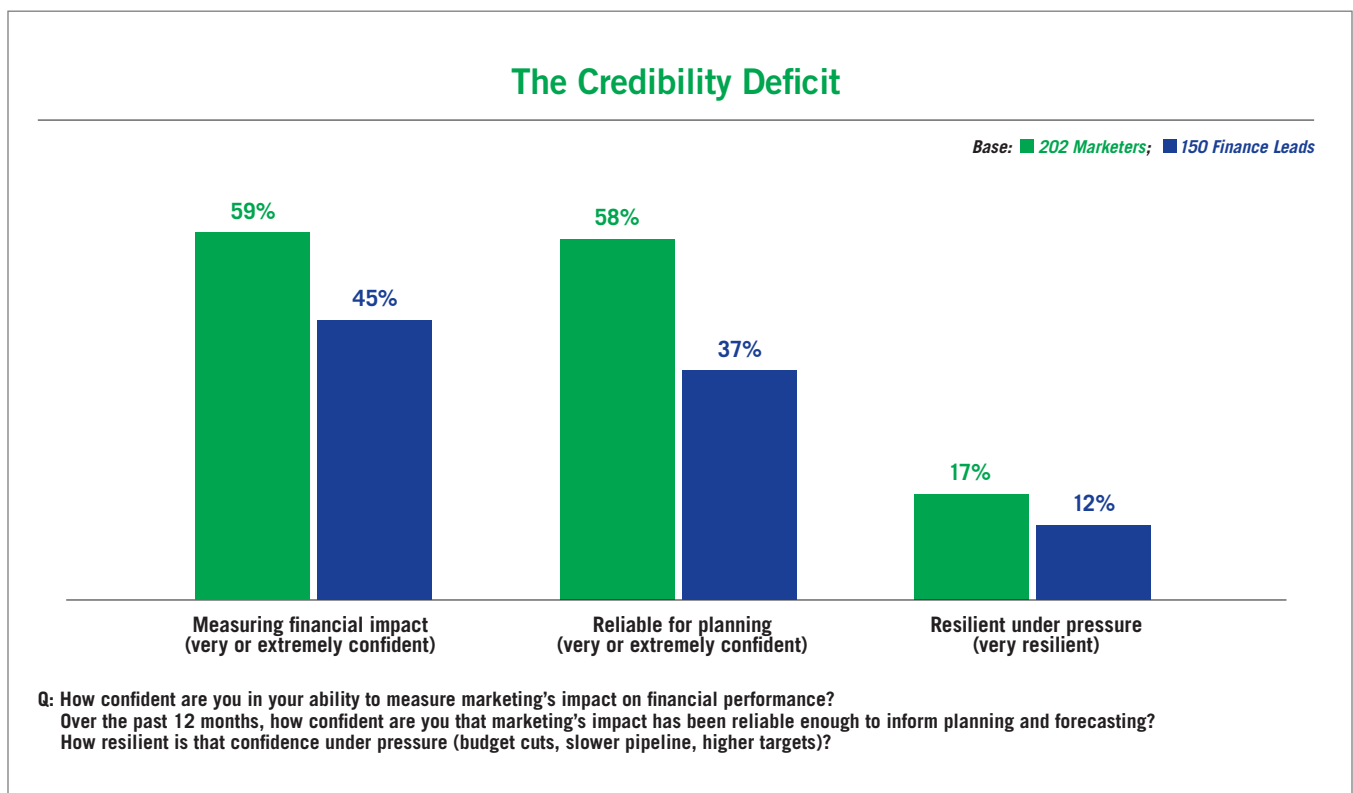
What separates that group is not ambition. It is a specific set of operating decisions, built on a data foundation that makes everything else possible.

- **Brand investment held and deepened.** 59 percent of Confident Marketers increased brand investment in the last 12 months, versus 38 percent of less confident marketers, and they protect it under pressure.
- **Sales alignment moved past handoffs.** 38 percent are highly aligned with sales on pipeline definitions and ownership, versus 16 percent. The unit of work is shared revenue accountability.
- **Buyer group enablement became the job.** 39 percent say marketing frequently helps champions defend purchase decisions internally, versus 10 percent. The unit of work is the champion.
- **Measurement matured into defensibility.** 32 percent say the connection between marketing reporting and business outcomes is very clear, versus 5 percent. Attribution is no longer the bar.

## The Credibility Deficit

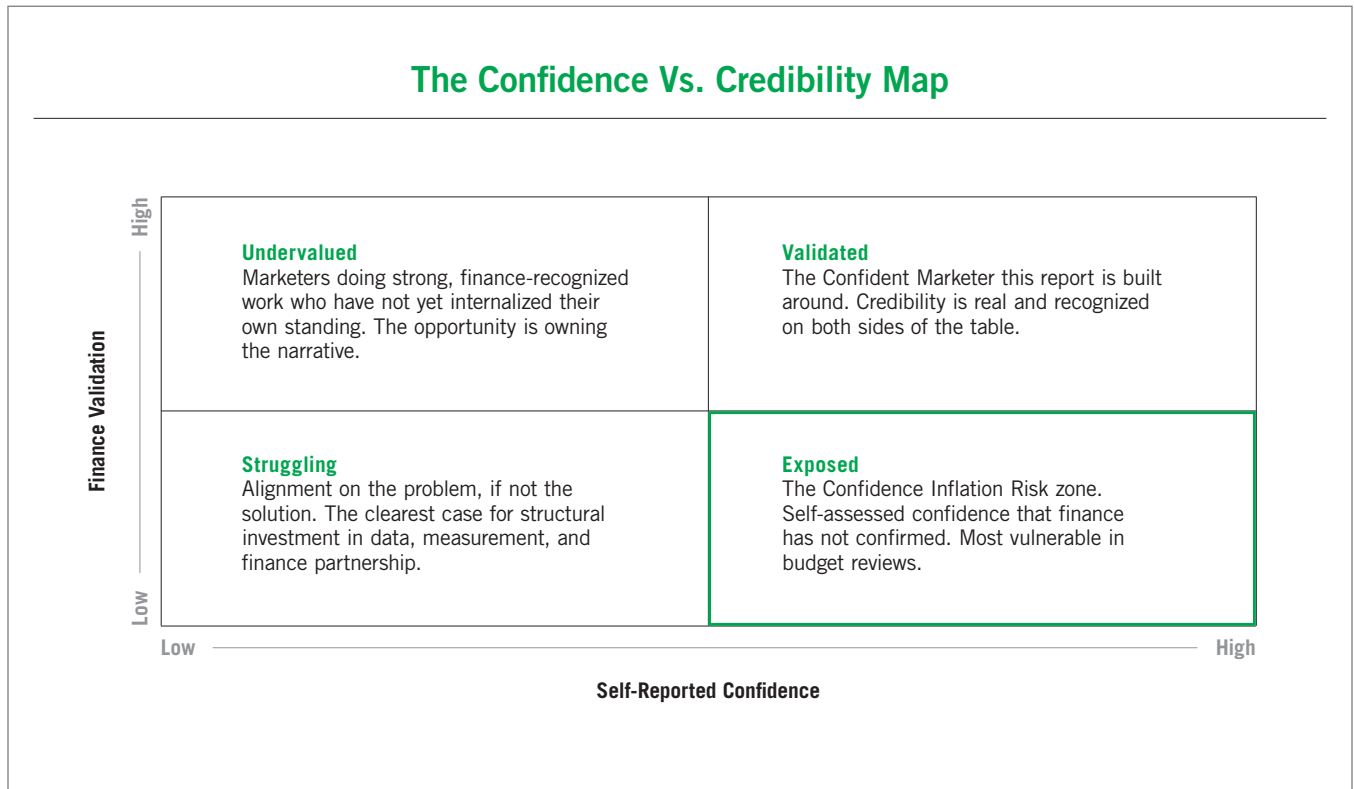
Finance and revenue leaders see the progress. They do not yet validate it at the same level. When 59 percent of marketers say they can measure marketing’s financial impact, only 45 percent of finance leaders agree. Only 37 percent of financial leaders say marketing’s impact has been reliable enough to inform planning and forecasting. And just 12 percent call that measurement resilient under pressure.

Finance and revenue leaders’ trust in marketing is not binary. It erodes under scrutiny, under planning cycles, and under pressure.



The cause is not disbelief. Finance leaders in this study are not skeptical of marketing by default. Forty-three percent define brand as a strategic intangible asset contributing to long-term enterprise value. The cause is translation: the distance between marketing’s metrics and the language finance uses to evaluate every other capital allocation in the business. This is where the Vocabulary Gap does its damage. When marketing and finance do not share definitions around pipeline, attribution, and impact, confidence on one side of the table does not cross the table.

## The Confidence Vs. Credibility Map



## The 12 Differentiators at a Glance

Across the 2026 survey, these behaviors consistently separate Confident Marketers from their less confident peers. They are ranked below by the size of the gap each opens between confident and less confident.

The largest gaps cluster around data infrastructure, AI readiness, buyer group enablement, and the clarity of marketing’s connection to business outcomes — the differentiators where Confident Marketers have built the most distance from their peers. The smaller gaps cluster around brand and revenue alignment, where the intent is widely shared, but the execution still varies.

### The 12 Differentiators

Base: ■ 120 Confident Marketers; ■ 82 Less Confident Marketers

#	Behavior	Confident	Less Confident	Gap
1	Data infrastructure ready to support AI	44%	6%	+38
2	Marketing frequently helps champions defend purchase decisions internally	39%	10%	+29
3	Connection between marketing reporting and business outcomes is very clear	32%	5%	+27
4	Marketing significantly reduces uncertainty in complex buying groups	28%	2%	+26
5	ABM program at a mature stage	33%	10%	+23
6	AI insight has changed a strategic decision in the last 12 months	42%	20%	+22
7	Brand treated as a business asset often or very often	51%	29%	+22
8	Highly aligned with sales on pipeline definitions	38%	16%	+22
9	AI insights highly trusted in planning and forecasting	22%	1%	+21
10	Brand investment increased in the last 12 months	59%	38%	+21
11	Marketing insights frequently lead to changes in business planning	31%	12%	+19
12	Achieves a balanced or brand-weighted investment mix between brand and demand	68%	51%	+17

## Marketing's 12 Blind Spots

The 12 differentiators show what separates Confident Marketers from their less confident peers. This chart asks a different question: where do Confident Marketers and finance and revenue leaders see the same work differently?

In most areas, Confident Marketers rate their own impact higher than finance validates. But in two areas, finance gives marketing more credit than Confident Marketers claim for themselves.

**Marketing's 12 Blind Spots**

*Base: ■ 120 Confident Marketers; ■ 150 Finance Leads*

#	Behavior	Confident Marketer	Finance and Revenue	Gap
1	Marketing impact reliable enough for planning	83%	37%	Mkt +46
2	Frequently helps champions defend purchase decisions	39%	15%	Mkt +24
3	Marketing significantly reduces buying group uncertainty	28%	4%	Mkt +24
4	AI has changed a strategic decision in last 12 months	42%	21%	Mkt +21
5	AI-generated insights highly trusted in planning	22%	7%	Mkt +15
6	Thought leadership treated as a strategic asset	38%	23%	Mkt +15
7	Measurement is resilient under pressure	24%	12%	Mkt +12
8	Joint planning runs consistently	29%	20%	Mkt +9
9	Data fully integrated across platforms	16%	9%	Mkt +7
10	Highly aligned with Sales on pipeline definitions	38%	33%	Mkt +5
11	Creative drives win rate	46%	55%	Finance +9
12	Brand treated as a business asset very often	8%	15%	Finance +7

**What this means for Confident Marketers.** The perception divide is not a trust problem. It is a translation problem. The Vocabulary Gap runs through almost every row in this chart: when pipeline, attribution, and impact are defined differently on each side of the table, the same work produces different conclusions. Closing the gap starts with shared definitions, not better metrics.

**The Confident Marketer Doesn’t Just Operate Better. They Deliver Better.**

Before we get into how Confident Marketers operate — the data foundations, the AI fluency, the buyer-group rewiring, the brand-as-asset framing — the headline is the outcomes.

Across this study, Confident Marketers translate marketing work into the business results finance, the C-suite, and shareholders actually recognize: not engagement, not awareness, and not internal sentiment, but revenue, forecast accuracy, customer durability, and repeatable commercial gains.

This is what “capital allocator” looks like in practice — measurable, repeatable, and visible from the boardroom.

**The Outcomes Gap, in Five Numbers**

Business Outcome	Confident Marketers	Less Confident Marketers	Multiple
Brand strategy frequently drives better-fit customers and more durable revenue	<b>33%</b> <small>(top box on 4-point scale)</small>	<b>5%</b>	<b>6.8 times</b>
AI is improving forecast accuracy	<b>38%</b>	<b>13%</b>	<b>2.9 times</b>
AI is driving commercial outcomes (revenue)	<b>29%</b>	<b>8.5%</b>	<b>3.4 times</b>
AI has meaningfully improved creative commercial effectiveness	<b>18%</b> <small>(top box on 5-point scale)</small>	<b>7%</b>	<b>2.4 times</b>
Creative-linked commercial gains are highly repeatable quarter to quarter	<b>14%</b> <small>(top box on 4-point scale)</small>	<b>4%</b>	<b>3.9 times</b>

Methodology note: Brand strategy, AI creative commercial effectiveness, and creative repeatability metrics report top-box selections on ordinal scales (4- or 5-point). AI forecast accuracy and AI commercial outcomes metrics report share of respondents who selected the option from a multi-select question asking which areas AI has improved.

Every one of these is a finance-recognizable result. Confident Marketers are nearly seven times more likely to say their brand strategy is producing better-fit customers and more durable revenue — the single most important sentence in this report for a CFO. They are three times more likely to say AI is driving revenue, not just driving sales. They are three times more likely to report repeatable commercial gains from creative work — the discipline finance reserves for things it can actually price.

**What This Means for the C-Suite Reader**

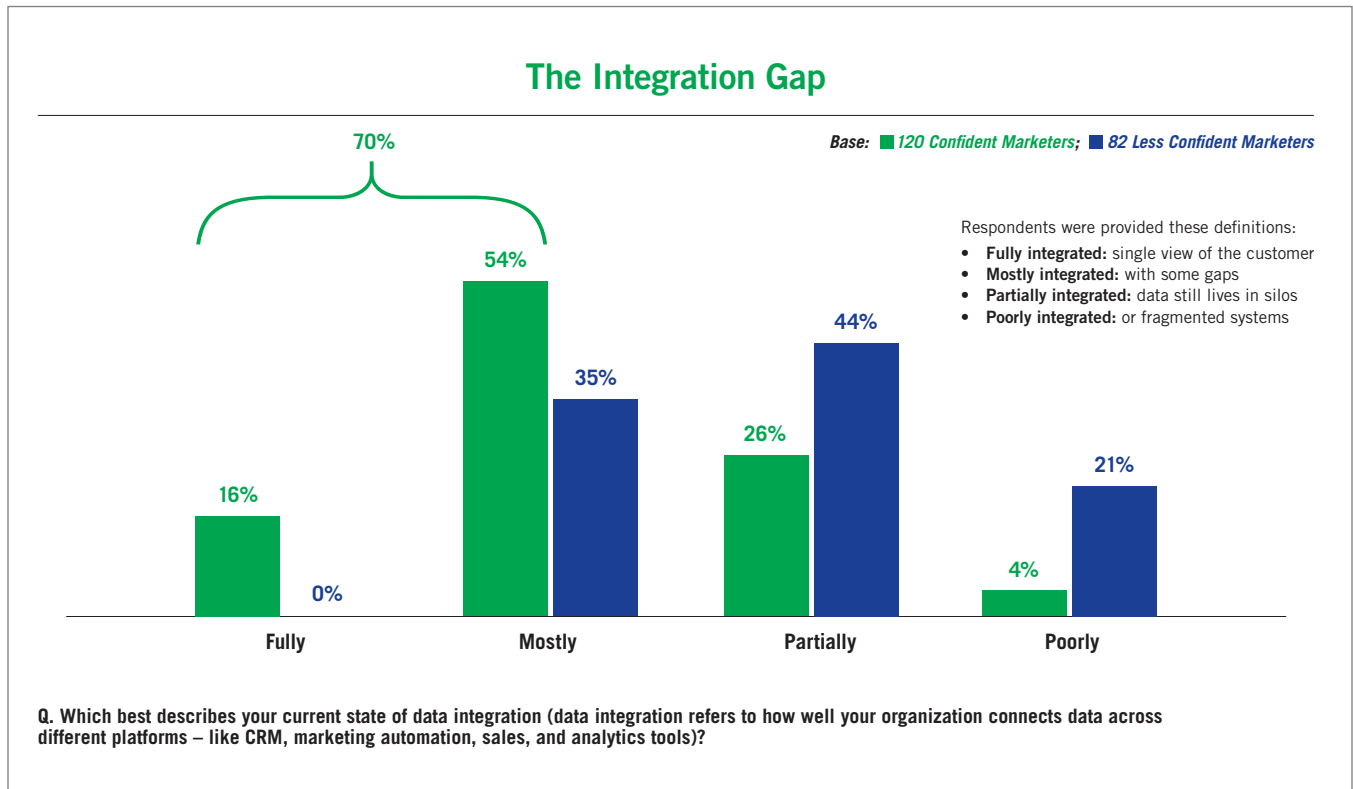
For the CFO, the CEO, and the shareholder reading this report, the implication is simple and material: Confidence in marketing is not a soft virtue. It is a leading indicator of measurable enterprise value.

The marketers behind these numbers are not running better campaigns in isolation. They are running businesses that capture more durable revenue, predict the future more accurately, and convert creative investment into commercial outcomes that show up in the P&L. They have built a data foundation that makes each of these things possible.

The rest of this report explains how they got there. This is what they delivered along the way.

## SECTION 1: DATA AND MARTECH READINESS

Confident Marketers are two times as likely as their less confident peers to describe their data as fully or mostly integrated, and the qualitative interviews are unanimous on why it matters: integration is what makes every downstream capability — AI forecasting, attribution, lifecycle marketing, account based marketing (ABM), finance-grade reporting — actually work.



The picture from the interviews is more concrete than the survey number. Confident Marketers don't describe data integration as an IT project. They describe it as a strategic act — the move that gives sales, finance, and AI a shared definition of what “qualified pipeline,” “active account,” and “engaged buyer” actually mean. Without it, every AI output is contested. With it, the conversation moves on.

### What We Heard from Confident Marketers

The interviews surface three disciplines that distinguish Confident Marketers from peers who say they're investing in data but haven't seen the payoff.

**Rationalize the stack before scaling it.** Several Confident Marketers described a counterintuitive move — cutting tools rather than adding them. The logic: every additional system creates another integration burden, another silo, and another place where AI can produce a conflicting answer. The Confident Marketers furthest along are running leaner stacks in 2026 than they did in 2024 and reporting better outputs. One CMO described it as “fewer tools, deeper integration, faster decisions.” Stack rationalization is the unglamorous prerequisite to AI readiness; the Confident Marketers doing it have stopped treating new martech purchases as proof of investment and started treating tool consolidation as proof of maturity.

**Build a semantic layer.** The most technically advanced Confident Marketers — concentrated in enterprise SaaS and financial services — described a specific architectural move: a semantic layer above their data lake that defines what each metric means in business terms. The unlock is consistency. When marketing's “qualified lead,” sales' “active opportunity,” and finance's “forecastable pipeline” all reference the same definitions, the financial language gap closes at the data level — before it ever has to close in a budget meeting. Several Confident Marketers described the semantic layer as the highest-leverage investment of the year because everything downstream — agentic workflows, journey orchestration, finance-grade reporting — runs on it.

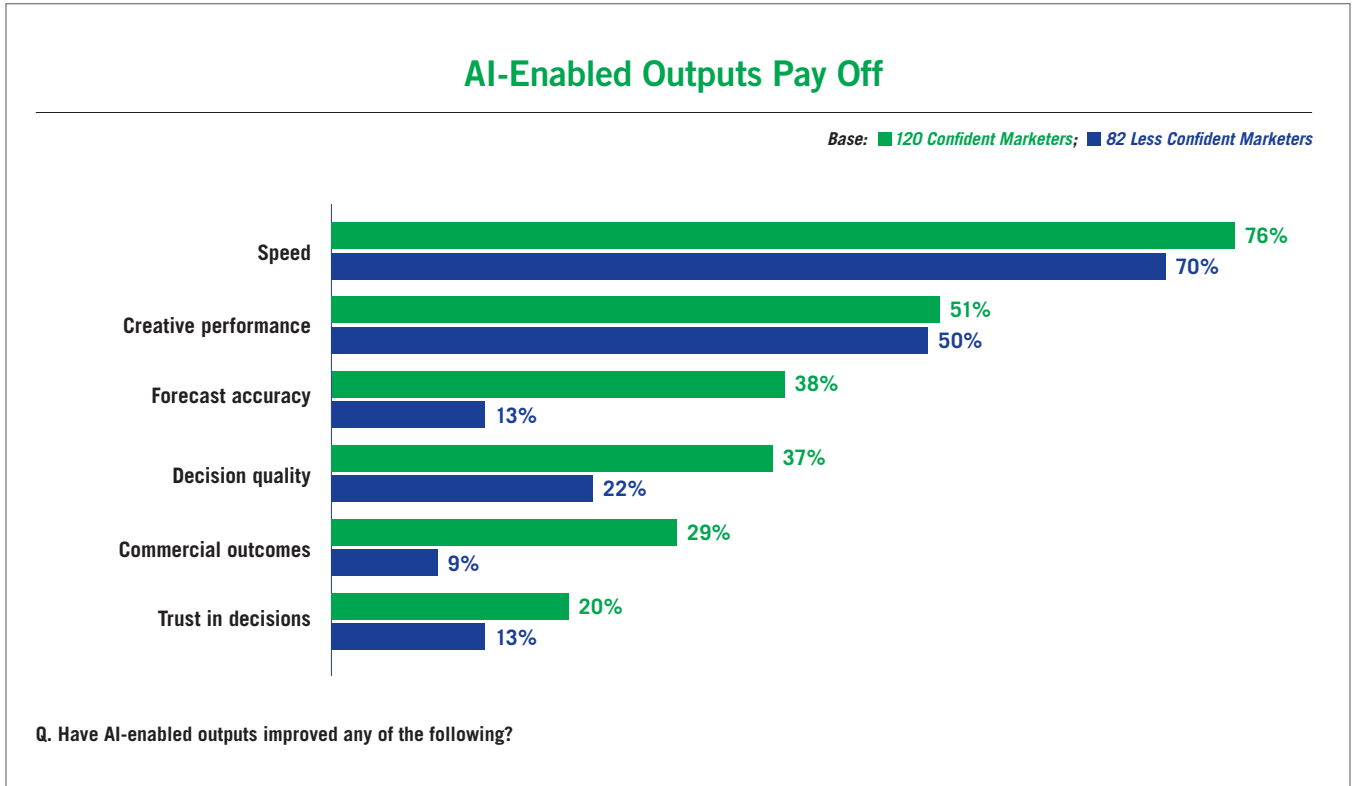
*“The semantic layer for data and AI readiness was the single most valuable investment we made. It's the unlock for everything downstream — agentic workflows, journey orchestration, finance-grade reporting.”*

*— VP, marketing operations, enterprise SaaS*

**Architect for two customers: humans and agents.** Several frontier-tier Confident Marketers described designing their data and content architectures for two downstream consumers: the humans who will read them and the AI agents — theirs and their buyers' — that will ingest, summarize, and act on them. The assumption inside these organizations is that agents will be a meaningful share of the audience for high-stakes content within twelve months. The architecture is being built now to be ready when they arrive.

### What the Data Shows

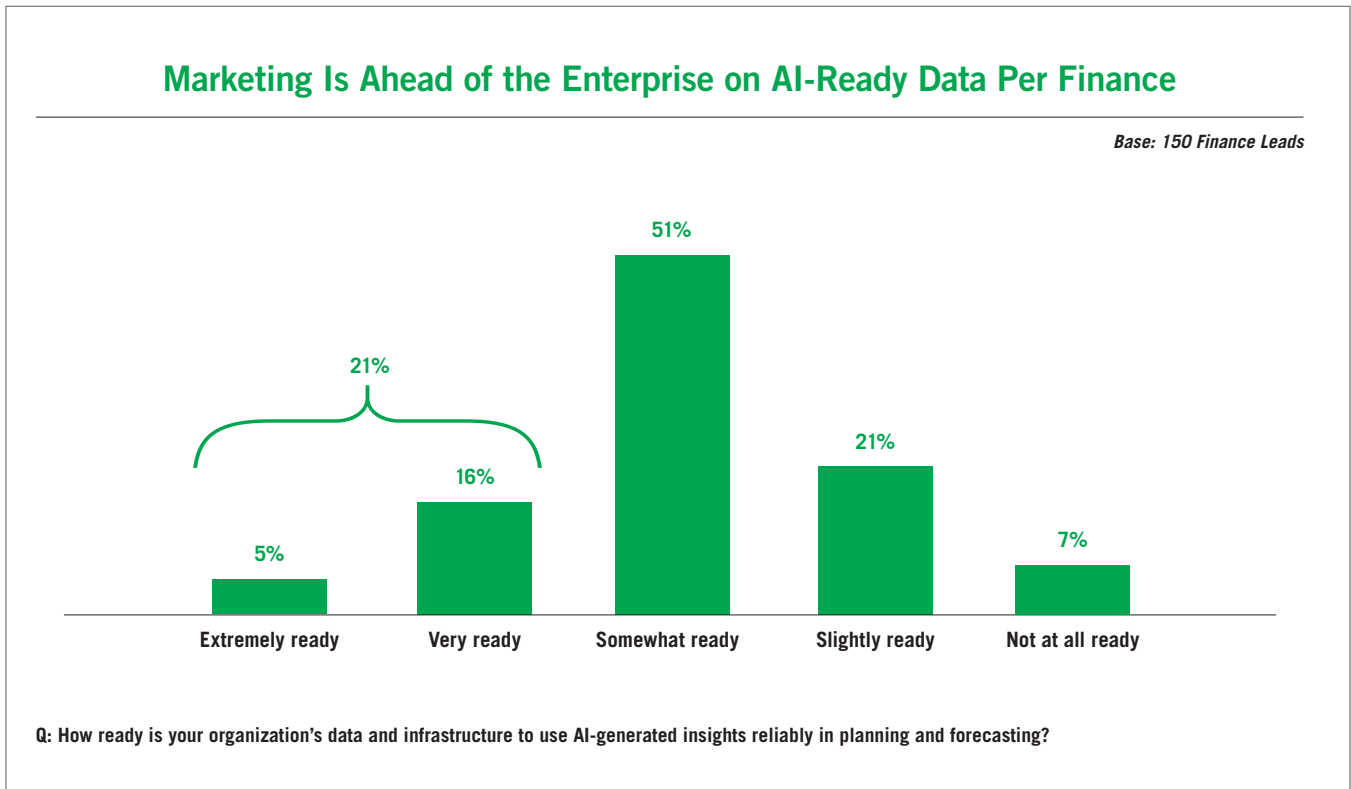
The integration foundation pays off most clearly where it matters most to finance: forecast accuracy.



Confident Marketers are three times as likely as their less confident peers to say AI has measurably improved their forecast accuracy. This is the dividend of data unification. Marketers running AI on integrated data are producing forecasts finance can use. Marketers running AI on fragmented inputs are producing outputs no one trusts — and giving CFOs another reason to believe in the AI hype.

## SECTION 1: DATA AND MARTECH READINESS

The finance and revenue survey adds a perspective Confident Marketers should hear. Across finance and revenue leaders, only 21 percent describe their organization's data and infrastructure as extremely or very ready to use AI-generated insights in planning and forecasting. Compare that to 43 percent of Confident Marketers who say the same about their own function. In many B2B organizations, marketing's data foundation is now ahead of the broader enterprise's — and finance knows it.

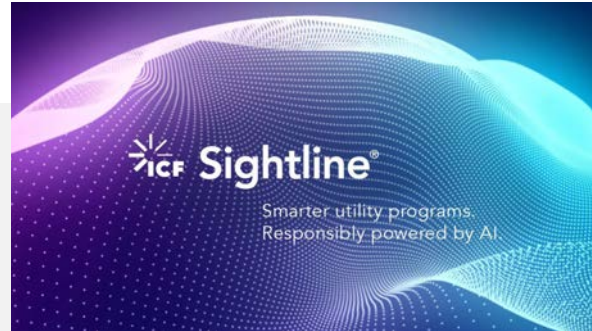


The finance interviews echo the pattern. Where one might expect finance to push back on data-platform investments — they're expensive, slow to pay off, easy to over-engineer — the finance and revenue leaders we spoke with were consistently positive about marketing's foundation work. As one head of commercial finance at a publicly traded medical device company described, marketing's recent upgrade to its market-data infrastructure was a clear win in his eyes — the new data set materially improved how marketing targeted accounts, and finance saw the difference in pipeline quality. Where the same finance leader pushes back is on what comes next: agentic AI workflows that would let those systems make autonomous allocation decisions.

## SECTION 1: DATA AND MARTECH READINESS

### How to Be a Confident Marketer in Data and Martech

- 1. Rationalize before you scale.** Every additional tool is another silo and another place AI can produce a conflicting answer. Cut tools before you add AI.
- 2. Build the semantic layer.** Define what each metric means in business terms — once — and make every downstream system, dashboard, and AI agent use that same definition. The Vocabulary Gap closes here first.
- 3. Build one source of truth, and make every system consume from it.** Confident Marketers use a consistent architectural discipline: a single trusted data layer that the CRM, the marketing automation, the reporting dashboards, and any AI workflows all reference. Marketing builds credibility because “qualified pipeline,” sales’ “active opportunity,” and finance’s “forecastable revenue” all draw from the same definitions.
- 4. Tie the foundation to forecast accuracy.** The data investment finance will most readily approve is the one that demonstrably improves forecast accuracy. Build the case in those terms before the next budget conversation.
- 5. Show the foundation, not just the outputs.** Finance and revenue approves data-platform investment far more than the autonomous AI workflows it enables. Lead the conversation with what’s been built and why it matters, not with the AI use cases it has unlocked.



## CASE STUDY

### **Sightline: Data Driven Account Based Marketing for Utility Business Customers**

Agency: ICF

Clients: Dozens of utilities across the U.S.

#### **Business Challenge and Program Objectives**

Energy utilities are operating in a rapidly changing environment shaped by evolving customer expectations, digital transformation, and a generational shift in decision making. As millennial and gen Z leaders increasingly influence energy decisions — and employee turnover reduces institutional knowledge — B2B engagement must be precise, relevant, and data driven.

ICF worked with dozens of utilities across the U.S. where their business customer records were often less than 15 percent enriched, with inconsistent company names, outdated contacts, limited firmographic data, and no visibility into enterprise ownership structures or multi-location relationships. This made it difficult to size the commercial and industrial market, identify high-value accounts, and prioritize outreach. These factors made effective account-based marketing (ABM) nearly impossible. The objective was to build a scalable B2B data and analytics foundation — powered by **ICF's Sightline® platform** — to support more precise ABM across multiple utilities and their customer programs. Sightline is a secure, cloud-native customer intelligence platform that helps utilities plan, deliver, and optimize energy-saving programs for households and businesses.

#### **Insights and Strategy**

ICF worked closely with marketing, operations, and customer engagement teams across those multiple utilities and programs throughout the planning process. ICF's Sightline ABM Data Hub helped the teams identify gaps in customer data and remove bottlenecks that slowed outreach. A structured research process gathered input from over 50 internal contributors to define the information needed to segment, prioritize, and reach customers effectively. Interviews with stakeholders and customer research revealed that incomplete records, manual processes, and fragmented data limited precision.

### **Concept/Big Idea**

This initiative started with a question: What if utilities could engage every business customer in a way that truly felt personal? That question sparked a transformation. The big idea was to use data as a catalyst for more human, more relevant, and more effective engagement. Not simply to improve records, but to turn fragmented operational data into a unified engine for ABM. At the center of this shift was a clear principle: data should live at the fingertips of the people responsible for engagement. Marketers and outreach representatives needed visibility into enterprise structures, decision-makers, sector behaviors, and participation history so they could act with confidence.

For the first time, utilities could see their commercial and industrial markets holistically. Opportunity clusters emerged. Enterprise relationships became clear. High-value accounts stood out. This visibility allowed teams to design differentiated journeys and nurture customers along their entire participation lifecycle.

### **Tactics/Execution**

Bringing this strategy to life required translating insight into action using ICF's Sightline platform. The first step was to humanize the data. More than 50 detailed B2B personas were developed, capturing business characteristics, motivations, operational pressures, and participation barriers. Grounded in research and enriched data, these personas directly informed targeting, messaging, and channel prioritization, giving teams a shared, practical framework for engagement and replacing one size fits all outreach with intentional segmentation.

Next, one-to-one customer spotlights made personalization tangible. Enriched profiles surfaced business identity, account structure, decision-maker context, and meaningful local details.

Equivalency calculations further bridged the gap between insight and action by translating energy savings into language that matched how businesses actually operate. For restaurants, savings were framed in familiar, kitchen-based terms (such as the equivalent of weeks of food inventory or new equipment purchases), while manufacturers saw impact expressed through production metrics like additional operating hours or capital investments. By reframing abstract energy reductions as tangible business outcomes, the value of participation became easier for decisionmakers to quickly understand, justify internally, and act on.

### Results

The initiative delivered measurable improvements in marketing performance, customer engagement, and program participation across multiple utilities. Two examples:

- In one region, personalized targeting drove 50-plus percent growth in leads, 300 percent growth in contacts, and accelerated project conversion timelines by two months. The utility moved from missing goals year over year to exceeding its savings target.
- In another region, data enrichment mapped 90 percent of business accounts to accurate types and identified 20-plus percent as multi-location organizations. Broad outreach was replaced with prioritized engagement, driving measurable increases in program participation.

Client feedback consistently highlighted improved personalization and strategic clarity. The work also earned a 2025 Martech Breakthrough Award for ABM Innovation, reinforcing its impact as a scalable, results-driven B2B strategy.

### Proudest Achievement Related to the Work

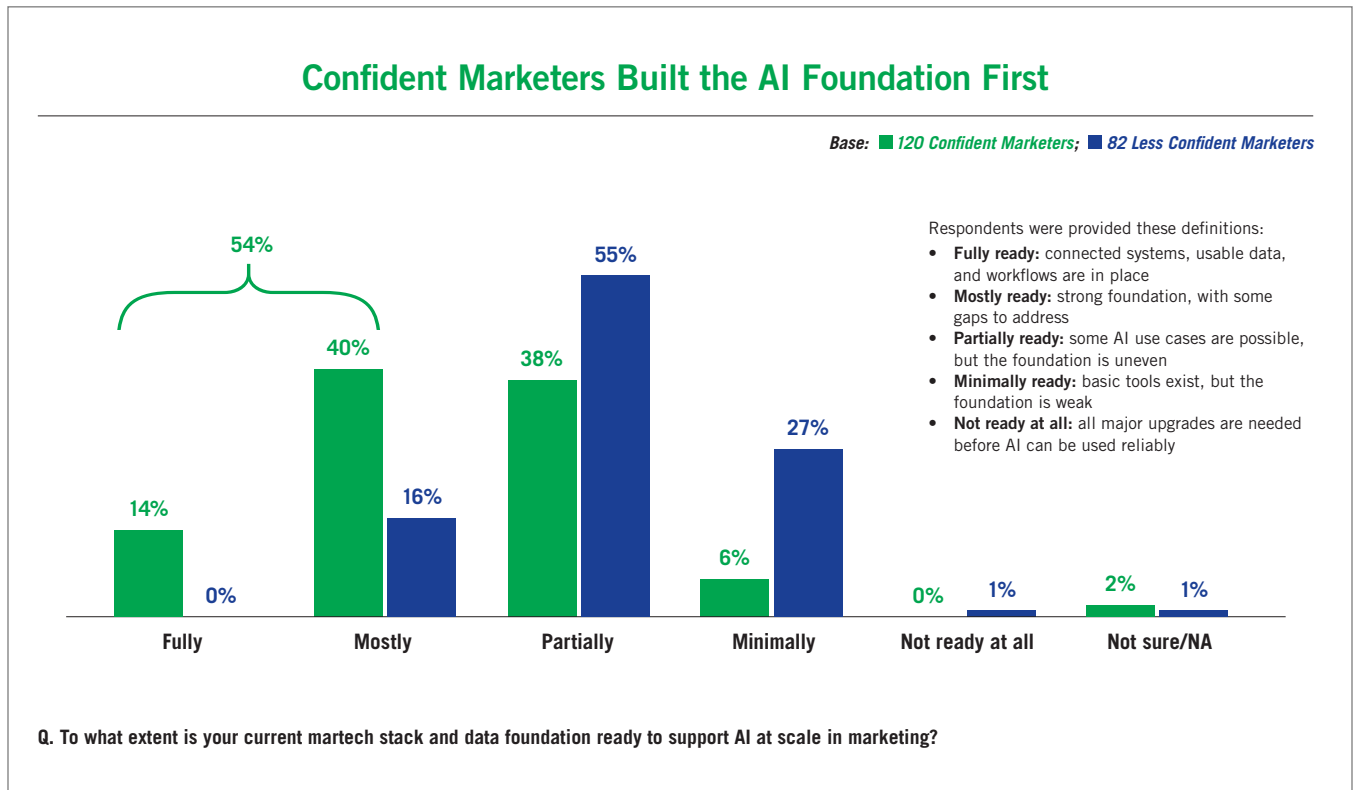
ICF's proudest achievement was helping multiple utilities crack a challenge they had struggled with for years — turning antiquated, inconsistent data into insights teams could actually use.



**This campaign was recognized in the ANA 2026 B2 Awards as a Gold winner in the B2B Data Excellence category.**

## SECTION 2: AI AS A DECISION SYSTEM

If 2025 was the year B2B marketing started adopting AI, 2026 is the year Confident Marketers built it into how they make decisions. They are greater than three times more likely than their less confident peers to say their data infrastructure is ready to support AI. They are 18 times as likely to say AI insights are highly trusted in planning and forecasting. And they are twice as likely to have used AI to change a strategic decision in the past 12 months.



But the more interesting issue is how they did it. The interviews tell one story across industries: Confident Marketers haven't won at AI by buying better tools. They've won by building the data foundation first, by being deliberate about where AI gets to make decisions, and by holding AI to the same standard of evidence they hold themselves to with finance.

### What We Heard from Confident Marketers

More than a third of the Confident Marketers we interviewed independently named data unification as the single most valuable investment of their past year. The language varied — a “semantic data layer,” a “single source of truth,” a “unified customer data foundation,” or a “data lake built for dual customers, humans and AI agents.” AI readiness is a function of how clean, integrated, and query-able your data is. Models are downstream.

*“Don’t start with the massive data lake. Don’t try to perfect everything. Don’t chase model sophistication ... build for dual customers — humans and agents.”*

— **VP, performance marketing, enterprise SaaS**

The interviews also surfaced three distinct ways Confident Marketers actually run AI.

- A small frontier group treats **AI as decision infrastructure** — embedded in capital allocation, signal-based orchestration, and agentic workflows that trigger marketing actions in real time.
- A larger middle treats **AI as a force multiplier** — accelerating testing, content variants, and analyst productivity, with humans validating before execution.
- A third group treats **AI as a productivity tool** — drafts, summaries, brainstorming, and routine work, and kept deliberately far from strategy.

The difference between confident and less confident marketers isn’t which model they pick. It’s that they’ve picked one explicitly and built for it.

That clarity matters most for the middle group. Organizations using AI as a force multiplier are the most exposed to governance drift — in which AI moves from accelerating decisions to making them, without anyone explicitly authorizing that shift. The finance interviews make clear how costly that drift is.

*“AI kind of raises the bar of my expectations. The type of analysis I was already requesting in a pre-AI era becomes more of a given. If you give me something you haven’t checked yourself, you are going to completely destroy your credibility.”*

— **CFO, digital security and cybersecurity**

That is the AI governance gap: the organizations most at risk are not the ones moving slowly, but the ones moving fast without updating their governance to match. Confident Marketers describe this not as a policy document but as a daily operating rule. AI runs creative variants and bid optimization. Humans still own budget allocation, brand positioning, and strategic narrative.

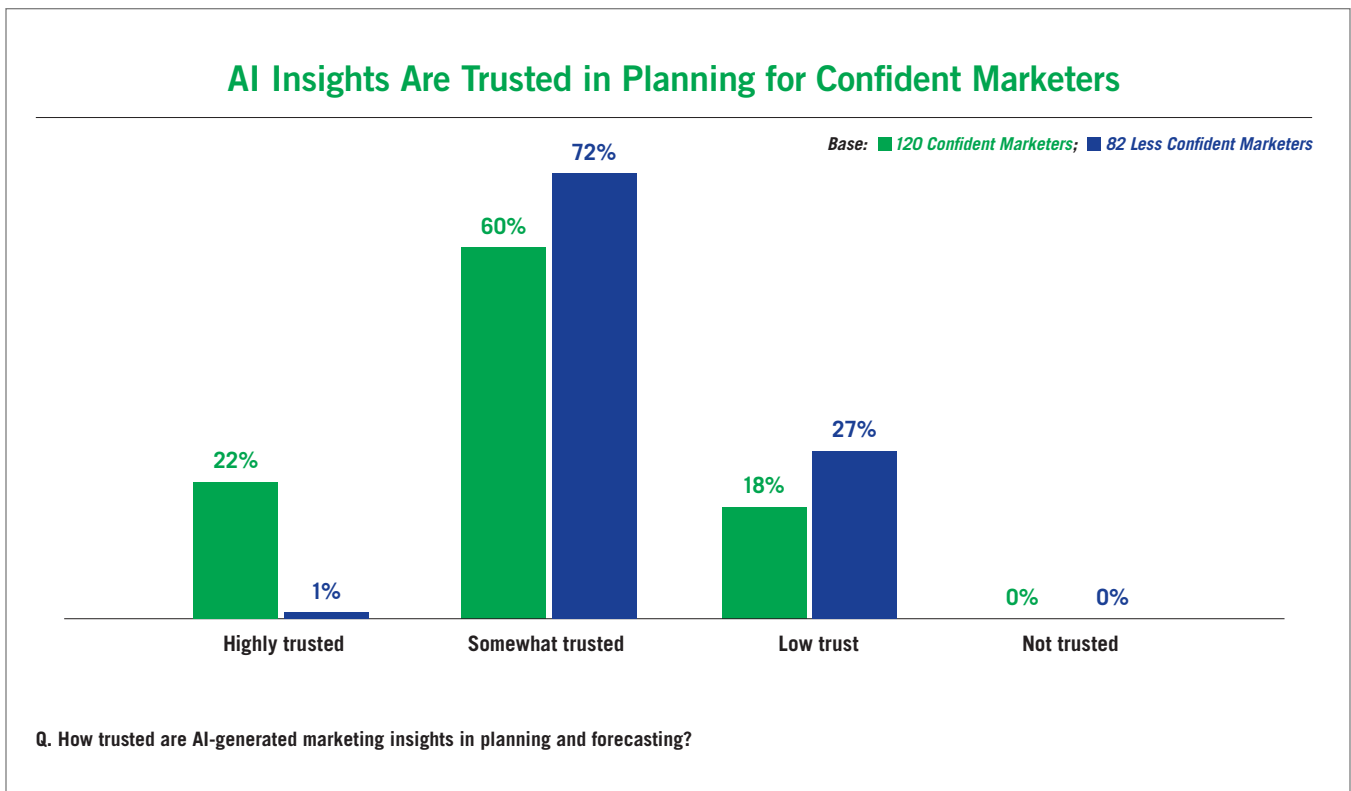
## SECTION 2: AI AS A DECISION SYSTEM

That clarity carries into how Confident Marketers present AI to finance. The operating rule is consistent: AI is credible to a CFO only when it is anchored in incrementality, transparency, and historical evidence. AI as black-box magic erodes trust faster than no AI at all. One CMO described labeling AI-derived metrics differently in finance-facing dashboards, so the CFO knows immediately what is inference and what is causal.

*“AI makes measurement more credible with finance when it’s grounded in incrementality, transparency, and financial outcomes — but less credible if it operates in a black box without clear validation.”*

— VP, lifecycle marketing, media company

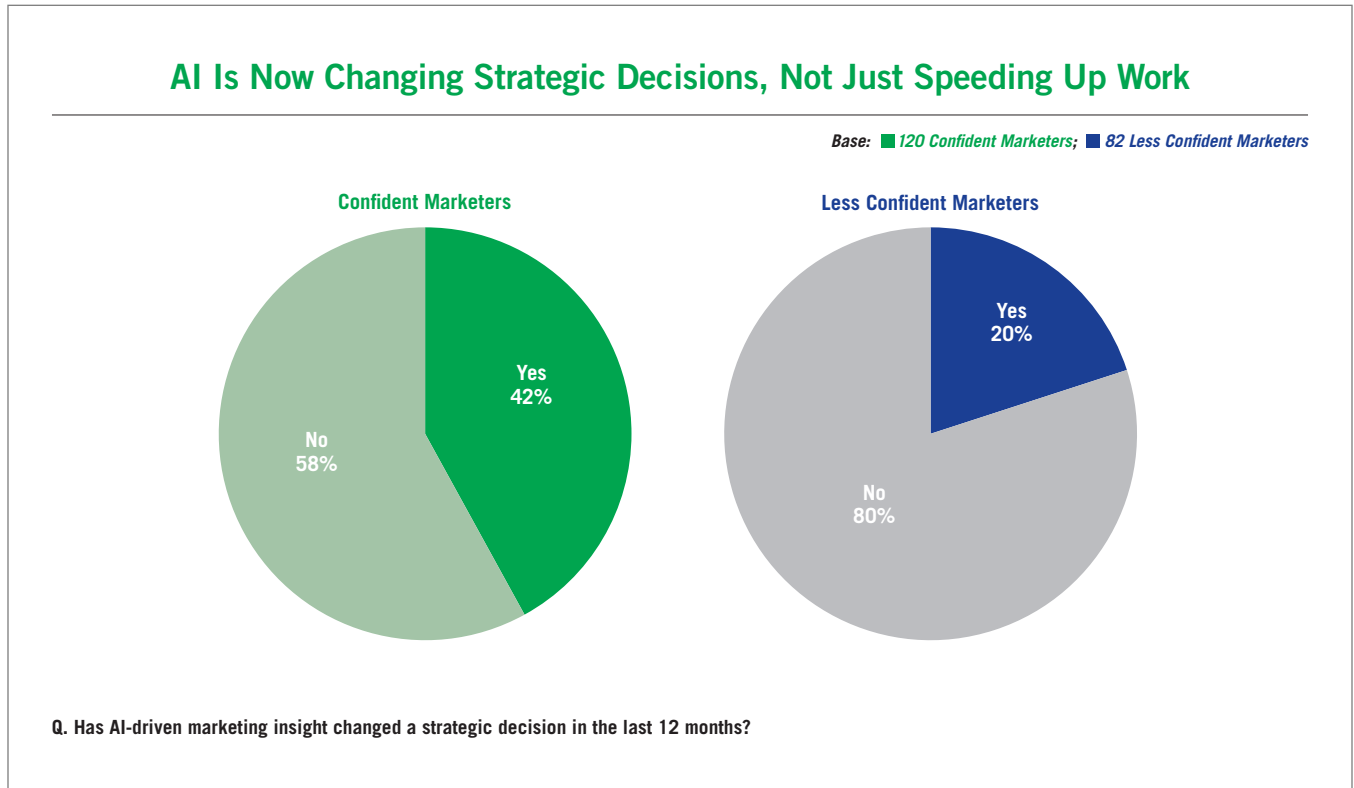
The same discipline shows up in creative. Confident Marketers are not running away from AI; they are using it harder for content variants, personalization, and localization, and protecting distinctive thought leadership, brand-defining creative, and high-stakes sales enablement from it. AI for scale and speed; humans for what defines you.



The trust differential on AI in planning is one of the largest single behavioral differences in the survey, and it tracks directly with the data foundation finding. Marketers who’ve done the data work trust the AI outputs that sit on top of it. Marketers who haven’t, don’t.

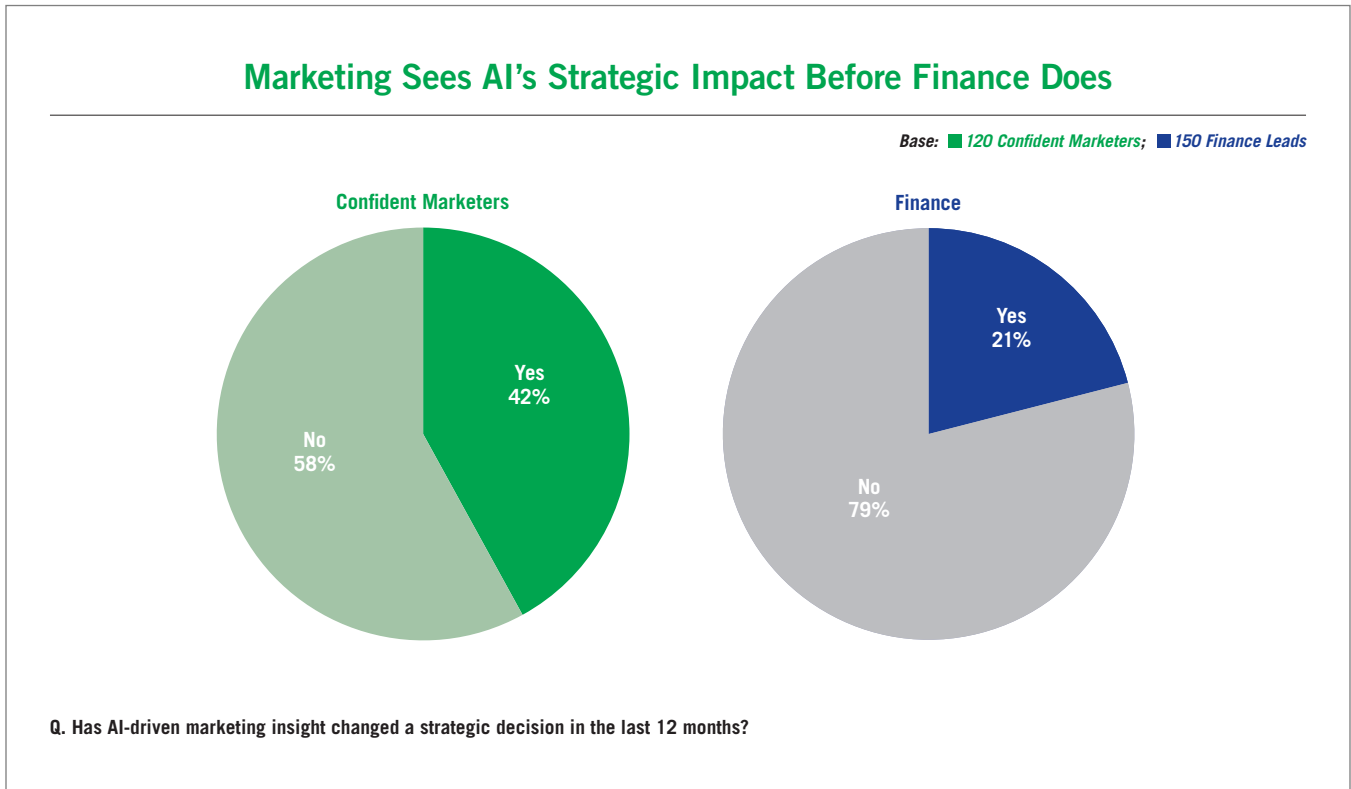
## SECTION 2: AI AS A DECISION SYSTEM

This signals a bigger shift from AI as a productivity layer to AI as part of the actual decision. For Confident Marketers, AI is no longer just summarizing meetings or drafting first passes. It is shifting forecasts, reallocating budget, and changing the strategic call.



## SECTION 2: AI AS A DECISION SYSTEM

Finance and revenue leaders see the progress, but only partially. Where 42 percent of Confident Marketers say AI has changed a strategic decision in their organization in the past year, only 21 percent of finance leaders say the same. Marketers see the AI signal earlier than finance does, and translation lags adoption.



The finance interviews put a sharper point on it. Finance leaders are not anti-AI. They are anti-black-box. AI in service of backward-looking analysis, incrementality testing, and historical defensibility earns their trust. AI as forward-looking decision system — especially for forecasting and capital allocation — does not yet.

*“If any marketing partner comes to me saying that they have an investment that is purely driven by AI insights, I'd be skeptical. Backward looking, AI is useful. AI-based forecasting tools are pretty wonky so far. I can give my kid a crayon and have them draw a line too.”*

**— Head of commercial finance, medical device manufacturer**

That is the unfinished work in 2026. The trust differential with finance on forward-looking AI is the most expensive credibility cost the field carries — and the hardest to close.

### How to Be a Confident Marketer in AI

- 1. Solve the data first.** Treat data unification — semantic layer, integrated CRM/marketing technology/CDP, clean taxonomy — as the prerequisite for AI, not a parallel workflow. Confident Marketers who report the highest AI trust did this work first, often for one to two years before layering AI on top.
- 2. Pick one operating model and commit.** Decide explicitly whether AI is a decision infrastructure, force multiplier, or productivity tool in your organization — and resource accordingly. The risk is not the model you pick. It is drifting across all three with no clarity for the team.
- 3. Govern where AI is allowed to act.** For each decision AI touches, define explicitly: can it act autonomously, recommend with a human approver, or stay fully manual? Confident Marketers describe this not as a policy document but as a daily operating rule — AI runs creative variants and bid optimization; humans still own budget allocation, brand positioning, and strategic narrative. Write the rule before you need it.
- 4. Match AI to the work.** Use it hard for the bottom 80 percent — content variants, personalization at scale, localization, and routine analysis. Use human decision making for the top 20 percent — distinctive thought leadership, brand-defining creative, original research, and executive sales enablement.
- 5. Operate the black box principle.** When AI shows up in finance-facing conversations, anchor it in incrementality, transparency, and historical evidence. Label inferred metrics differently from causal ones. Treat AI as an evidence amplifier, not a substitute for evidence.

## CASE STUDY

### Genpact's Generative Brand

Agency: BBH



#### Business Challenge and Program Objectives

Genpact was born in business process outsourcing (BPO), but survival hinged on transforming the way it, and its clients, work with AI. Becoming an AI-powered workforce was only the first step. Changing market perception was the real challenge, especially as AI hype fatigue and empty promises had created a particularly skeptical market.

#### Insights and Strategy

Three truths shaped the work. First, in B2B, the only credible AI claim is something that actually works. Second, Genpact's biggest media channel isn't paid (budgets are small), it's 140,000 employees making company materials. Finally, AI has matured just enough for brand governance to live in prompts and systems, not with unruly PDFs and brand police.

#### Concept/Big Idea

Destroy the construct of a traditional brand and create one like AI software, not like stationery — something none of the established competitors could do. Genpact created a generative brand, where prompt design and agent behavior govern brand consistency, not giant brand book PDFs and where brand assets are created for infinite contexts, not from limited libraries. All distinctive brand assets were designed to be a collaboration between employees and AI to support any meeting, client, or moment. But more than anything, it looked and behaved like AI in the minds of the audience. The brand would be a living representation of the business.

#### Tactics/Execution

A generative brand stack was designed: prompt architectures, visual guardrails, and bespoke models that output assets that are never the same but always on-brand. AI was used to help design a visualization of AI, which can be totally abstract or hyper-specific; Genpact designed a photography prompt allowing art directors to truly art direct; it generated a bespoke icon library that extends infinitely; custom LLM models mean all written content uses their tone-of-voice; it generated customized logos based on context; and marketers could generate a full ecosystem of brand-compliant materials in an instant. The small in-house team could now act like a giant multi-disciplinary agency, and 140,000 employees quickly became AI practitioners.

## SECTION 2: AI AS A DECISION SYSTEM



### Results

- Advanced technology revenue up double digits year over year.
- Delivered double digit brand value growth in 2025 and was one of only four companies in its industry do so (Brand Finance study).
- Named a “brand to watch” by the *Financial Times*, showing the market recognized the reinvention.
- Earned four times more AI-related brand mentions than BPO in 2025, evidence conversation was firmly about Genpact’s future.
- Grew client NPS score.
- Earned recognition of brand pivot by almost three-quarters of its clients, showing a perception shift at the decision-maker level.
- Gained a significant increase in analyst leader rankings across major industry evaluations in tech and AI-led services (e.g. Gartner, HFS, Everest, etc.).

### Proudest Achievement Related to the Work

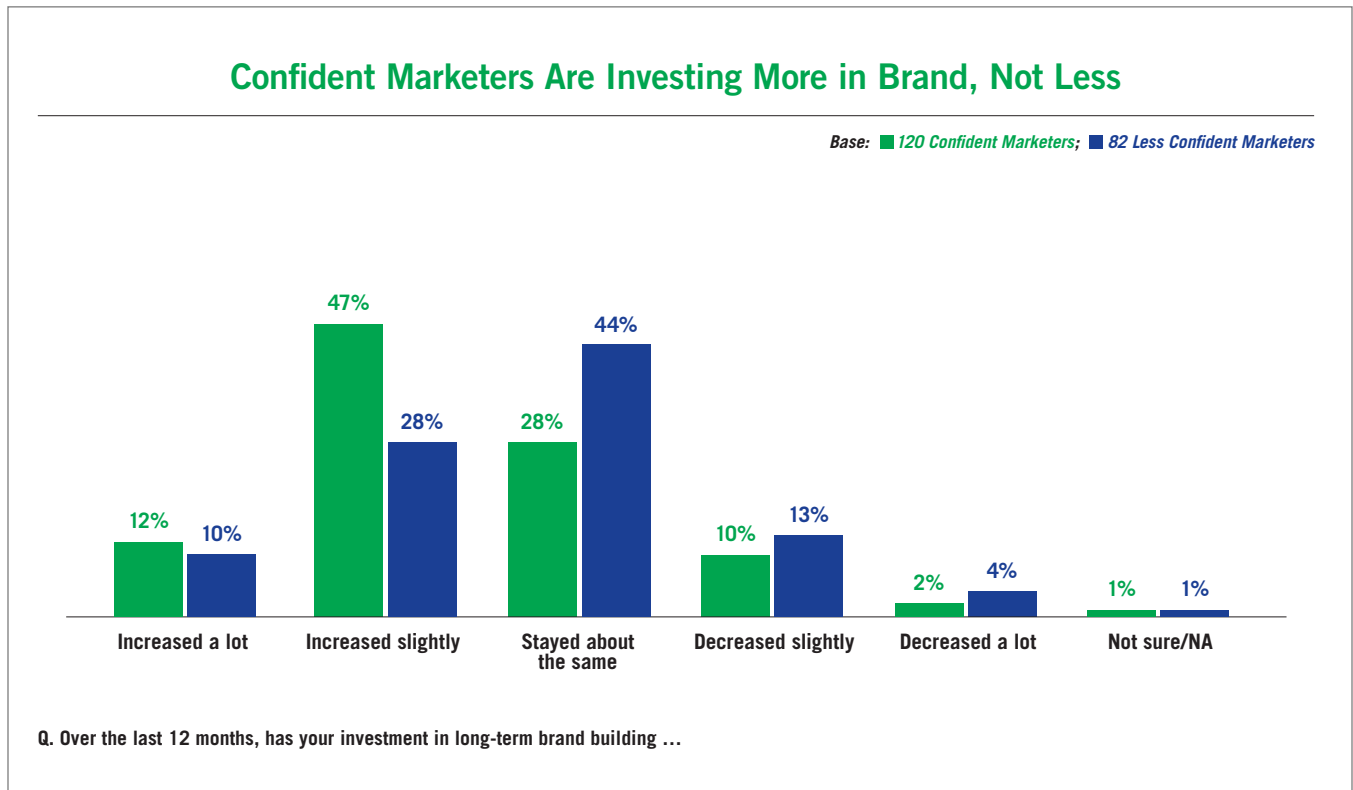
Creativity is so often thought of as a nice-to-have for businesspeople. But Genpact proved that thinking creatively about a brand, and infusing creativity into how a brand is operationalized, can be a huge driver of business needs. Creativity is its biggest asset, and it’s squeezing every drop.



**This campaign was recognized in the ANA 2026 B2 Awards as a Gold winner in A.I./Emerging Technologies category.**

## SECTION 3: BRAND AS A BUSINESS ASSET

In a year when many B2B organizations cut brand under budget pressure, Confident Marketers did the opposite. Nearly three in five report increasing their long-term brand investment in the past twelve months — versus 38 percent of their less confident peers. They are also far more likely to treat brand as a business asset rather than a discretionary marketing line item. The story underneath: Confident Marketers have stopped arguing that brand matters and started showing that it does.



### What We Heard from Confident Marketers

The qualitative interviews surface moves that distinguish the Confident Marketers winning the brand argument from peers who believe in brand but can't act on it.

**They reframe brand in commercial language.** Across industries, Confident Marketers described the same translation move: stop reporting brand in brand vocabulary (awareness, recall, lift) and start reporting it in commercial vocabulary (CAC reduction, win-rate lift, pricing power, retention, deal velocity). The metrics didn't change. The framing did. The reframe earned a name from one of the most articulate Confident Marketers we interviewed: brand isn't overhead — brand is prepaid demand efficiency.

*“ We protected the budget by reframing brand not as overhead, but as a prepaid efficiency. I showed branded search drove our lowest CAC and fastest-closing deals. Brand stopped being a growth bet and became a CAC reducer the CFO could see in the dashboard.”*

— SVP, global marketing, enterprise SaaS

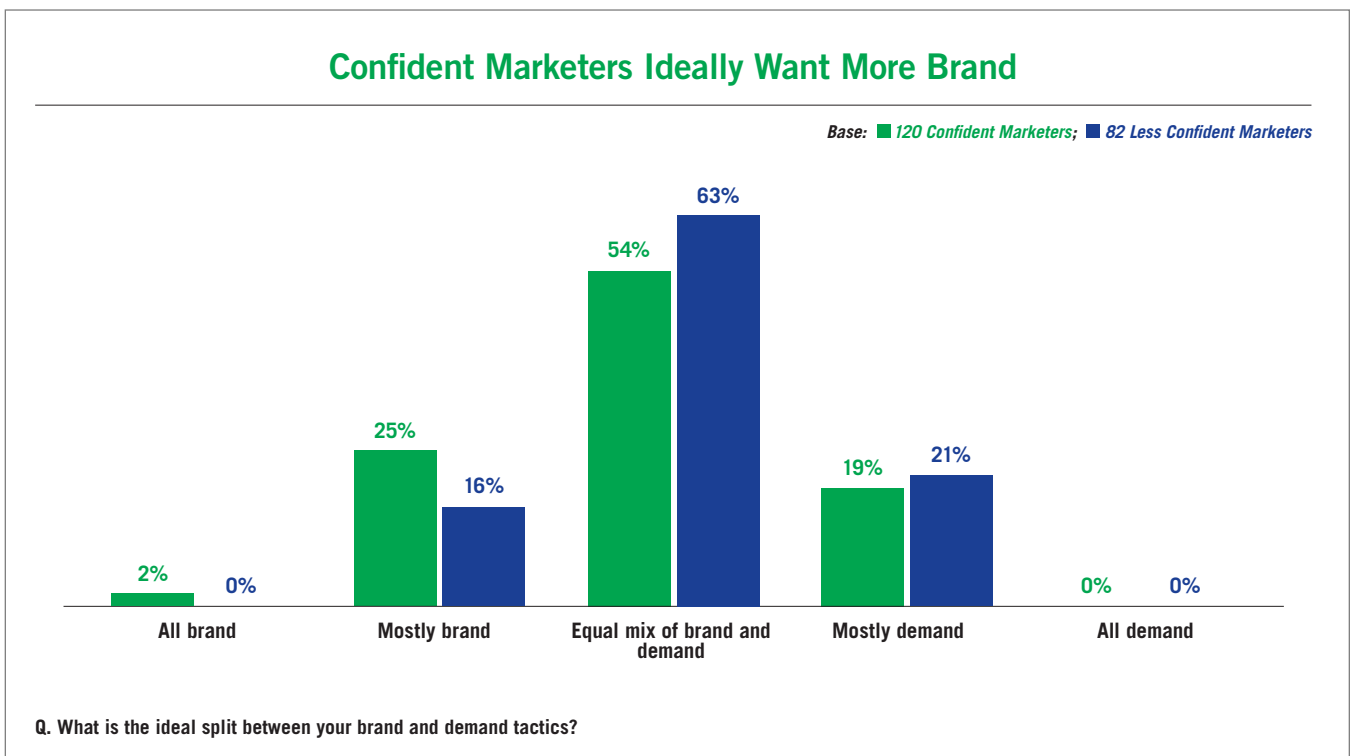
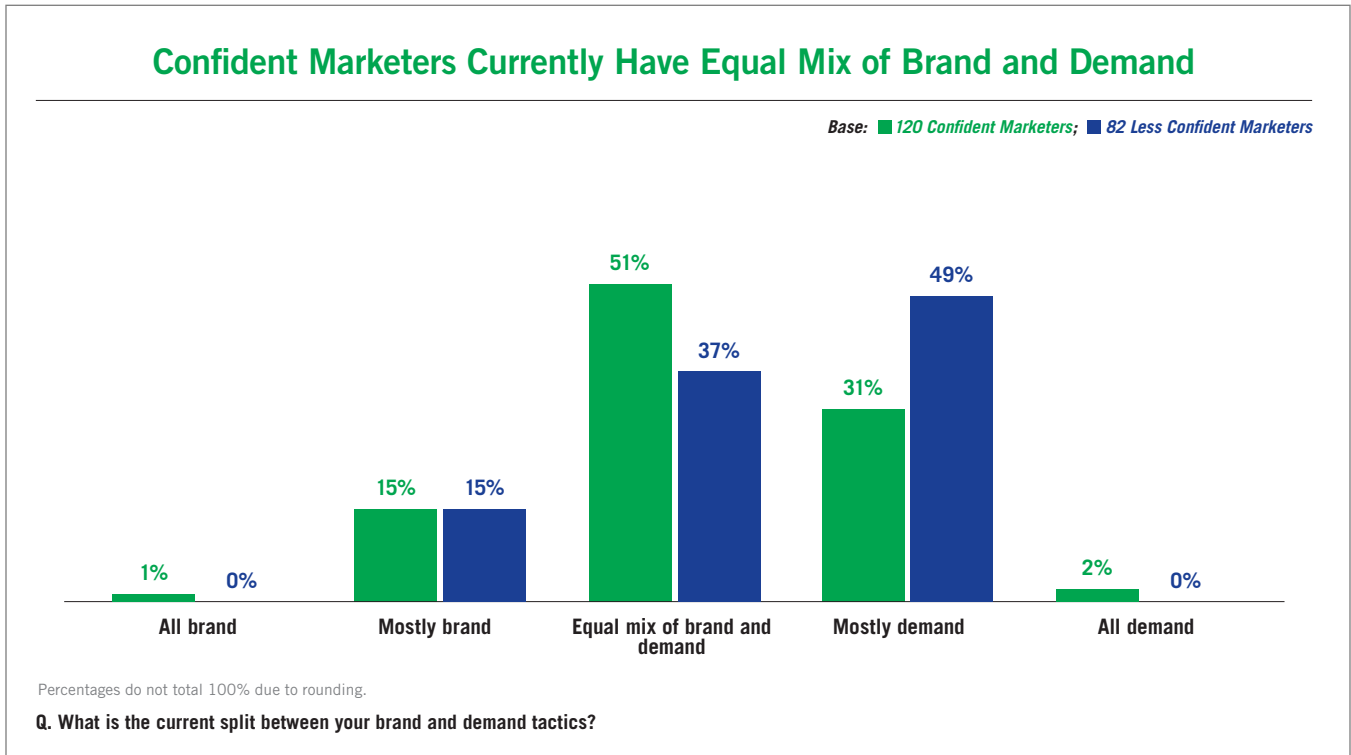
**They close the brand-to-demand execution gap.** Almost every senior B2B marketer says a balanced or brand-weighted investment mix is the right answer — 80 percent of all marketers surveyed. But only 68 percent of Confident Marketers and 51 percent of less confident actually run that mix today. The intent is universal; the execution still varies. Confident Marketers describe the work as continuous: rebalancing the budget every quarter against pressure to over-rotate to demand capture.

**They build the proof before the meeting, not during it.** The Confident Marketers who protect brand best don't argue for it reactively when budget pressure hits. They build the case in advance — typically a model showing what happens to acquisition cost, conversion, and pipeline velocity when brand investment drops — and share it proactively with finance during planning rather than defensively during cuts. The work pays off: Confident Marketers report brand cut first under pressure roughly half as often as their less confident peers (18 percent versus 34 percent).

### SECTION 3: BRAND AS A BUSINESS ASSET

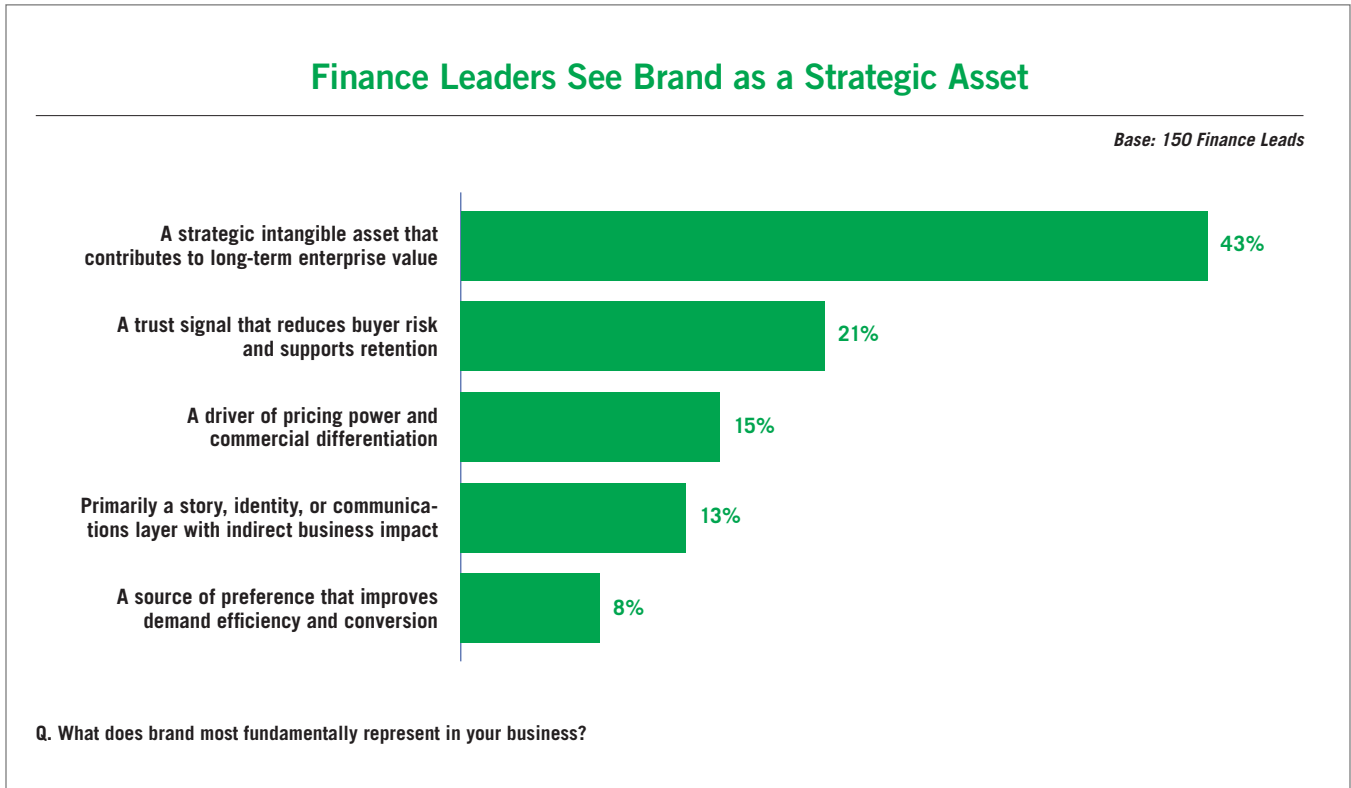
#### What the Data Shows

The execution gap on brand and demand mix is one of the most useful diagnostics in the survey. Almost everyone agrees on the destination. Confident Marketers are simply further along the road.



### SECTION 3: BRAND AS A BUSINESS ASSET

The finance and revenue survey closes the loop in a way that should reframe the entire brand-defense conversation inside marketing. Finance leaders already see brand as strategic. When we asked 150 finance and revenue leaders what brand most fundamentally represents in their business, the largest single group — 43 percent — chose “a strategic intangible asset that contributes to long-term enterprise value.” Only 13 percent chose “a story, identity, or communications layer.” The case marketers spend their careers preparing — that brand matters, that it compounds, that it’s worth defending — is a case finance has already accepted in principle.



### SECTION 3: BRAND AS A BUSINESS ASSET

What finance hasn't accepted is the evidence most marketers bring. The proof types finance and revenue leaders rate most persuasive for brand investment decisions are commercial: customer proof and analyst validation, pipeline quality, retention and expansion impact, win-rate lift, and pricing power. Brand tracking shows up — about a third of finance leaders rate it persuasive — but it sits below every commercial proof type. Finance isn't anti-brand. They are pro-evidence, in the form of evidence they already use to evaluate every other capital allocation.

*“ My honest answer is, I am not competent enough to look at the return from brand investment. We have budget allocated, and we look at our marketing folks to make the best use of that money.”*  
— CFO, global CPG

*“ When I hear that customers would all else equal prefer us, or would pay more for us because the brand is trusted — that's real to me. That language I understand.”*  
— head of commercial finance, medical device manufacturer

Finance isn't the obstacle to brand investment. The requirement is not more proof. It is proof in the right language. Finance leaders who fund brand investment consistently describe the same standard: brand metrics must connect to commercial outcomes finance already tracks. One CFO put it directly:

*“ Brand must translate into trust plus a measurable pipeline. I will not fund any broad brand campaign unless it improves the probability of winning higher value opportunities.”*  
— CFO, digital security and cybersecurity

## SECTION 3: BRAND AS A BUSINESS ASSET

### How to Be a Confident Marketer in Brand

- 1. Increase, then defend.** The Confident Marketer pattern is investment first, defense second. Marketers who only argue for brand when budget pressure hits are arguing too late.
- 2. Run the mix you say you believe in.** Eighty percent of marketers say balanced or brand-weighted is ideal. Nearly half don't run it. Close that gap before the next planning cycle.
- 3. Translate brand into commercial language.** Stop reporting brand in brand vocabulary. Translate every brand investment into CAC reduction, win-rate lift, pricing power, retention, or deal velocity — the language finance already uses.
- 4. Pre-build the proof.** Run the model that shows what happens to acquisition cost and pipeline velocity when brand drops. Update it quarterly. Share it in planning, not in cuts.
- 5. Use finance's vocabulary on finance's calendar.** Finance plans in quarters; brand compounds over years. Bridge the gap by reporting monthly leading indicators — branded search, direct traffic, deal velocity for brand-engaged accounts — framed as predictors of future demand efficiency.

## SECTION 3: BRAND AS A BUSINESS ASSET

### Brand ROI Translation Matrix

The Brand ROI Translation Matrix maps the brand metrics marketing commonly tracks to the commercial proxies finance understands and the proof types finance finds most persuasive, drawn directly from what finance and revenue leaders told us in this study.

Brand Metric	What Marketing Tracks	Commercial Proxy Finance Understands	Most Persuasive Proof Type (Finance-ranked)
<b>Brand awareness</b>	Aided / unaided recall, share of voice	Revenue premium vs. category average; CAC vs. unbranded acquisition	Customer proof / references (37%); Pricing power indicators (32%)
<b>Brand trust</b>	NPS, sentiment scores, trust survey ratings	Customer retention and expansion rate	Retention and expansion impact (37%); Pipeline quality (37%)
<b>Thought leadership</b>	Content engagement, share of voice, analyst citations	Influenced pipeline quality and deal win rate	Win-rate lift (33%); Pipeline quality (37%)
<b>Brand perception</b>	Favorability, consideration, purchase intent	Sales cycle compression; discount rate vs. benchmark	Customer proof / references (37%); Win-rate lift (33%)
<b>Brand investment</b>	Share of budget allocated to brand vs. demand	Pricing power; long-term enterprise value	Pricing power indicators (32%); Brand tracking data (31%)

## CASE STUDY

### Carhartt — The Next Responders

Agency: Mower



#### Business Challenge and Program Objectives

Skilled trade professionals are essential to the industries Carhartt supports, yet those industries are facing a widening labor gap that threatens long-term stability and growth. Employers across utilities, construction, and infrastructure sectors are struggling to attract and retain qualified workers, creating a growing risk to business continuity and community recovery.

As a brand deeply embedded in the trades, Carhartt recognized that supporting its customers required more than producing durable workwear. It required leadership in helping strengthen the talent pipeline.

Carhartt's campaign objective was twofold:

- Increase engagement with individuals who may have a latent interest in skilled trade careers.
- Strengthen Carhartt's credibility as a proactive business partner helping industries address an existential workforce crisis.

#### Insights and Strategy

Research shows purpose and impact drive career choices for younger generations, yet skilled trades are often seen as fallback jobs. Carhartt saw an opportunity to change that by reframing how people view these professions.

Disaster recovery proves that skilled trades are the backbone of restoring power, clearing roads, and rebuilding communities. The insight was simple: these workers aren't just part of the response; they are the recovery.

Carhartt's strategy was to elevate the visibility, dignity, and cultural relevance of skilled trades by spotlighting real workers in action. Through authentic stories of resilience and impact, the campaign inspired new talent and reinforced Carhartt's commitment to the industries it serves.

### Concept/Big Idea

First responders save lives. But in the aftermath of disaster, skilled trades professionals carry the responsibility of rebuilding. Carhartt gave skilled trade workers a name that reflects both their impact and the nobility of the calling: the Next Responders.

This idea reframed linemen, utility crews, heavy equipment operators, and infrastructure workers as mission-critical contributors to recovery. Professionals who restore power, rebuild homes, and bring communities back to life.

By elevating these workers with a title that conveys their importance, the campaign repositioned skilled trades as purposeful, rewarding careers defined by service, resilience, and responsibility. The idea transformed a workforce shortage into a story about impact, inspiring greater respect for skilled trades while encouraging the next generation to consider joining them.

### Tactics/Execution

The campaign launched with a documentary-style content series filmed in Spruce Pine, North Carolina, one of the towns hit hardest by Hurricane Helene. More than a year later, crews were still restoring infrastructure. Their firsthand accounts of sacrifice, resilience, and responsibility became the emotional foundation of the campaign.

The series expanded into an integrated campaign across paid and organic social, YouTube, connected TV, email, trade media, and a dedicated content hub housing a growing library of Next Responders episodes.

Carhartt also invited the featured Next Responders to its Global Sales Conference for a live Q&A. The rollout culminated in a local media partnership with Asheville’s ABC affiliate WLOS on the one-year anniversary of Helene, ensuring recognition reached both affected communities and the professionals still rebuilding them.



See more via the video [here](#).

### Results

The campaign delivered strong engagement and performance across channels:

- 660K-plus connected TV views with a 99 percent completion rate
- 99 percent YouTube completion rate, generating several thousand new subscribers
- 53 percent engagement rate for skilled trades inquiries
- Nearly 10 percent increase in site traffic to Northwest Lineman College starting after launch
- 135K-plus LinkedIn video views, with utilities emerging as the top engaged industry

Beyond media performance, the campaign strengthened Carhartt's position as a proactive business partner addressing workforce sustainability. The platform generated meaningful engagement among trade-focused audiences and drove measurable interest in skilled trade education programs. Internally, the campaign was heralded as one of the strongest in years.

### Proudest Achievement Related to the Work

The proudest achievement was giving skilled trade professionals the cultural recognition they deserve. By reframing these workers as Next Responders, the campaign elevated their role from behind-the-scenes labor to mission-critical contributors to community recovery.



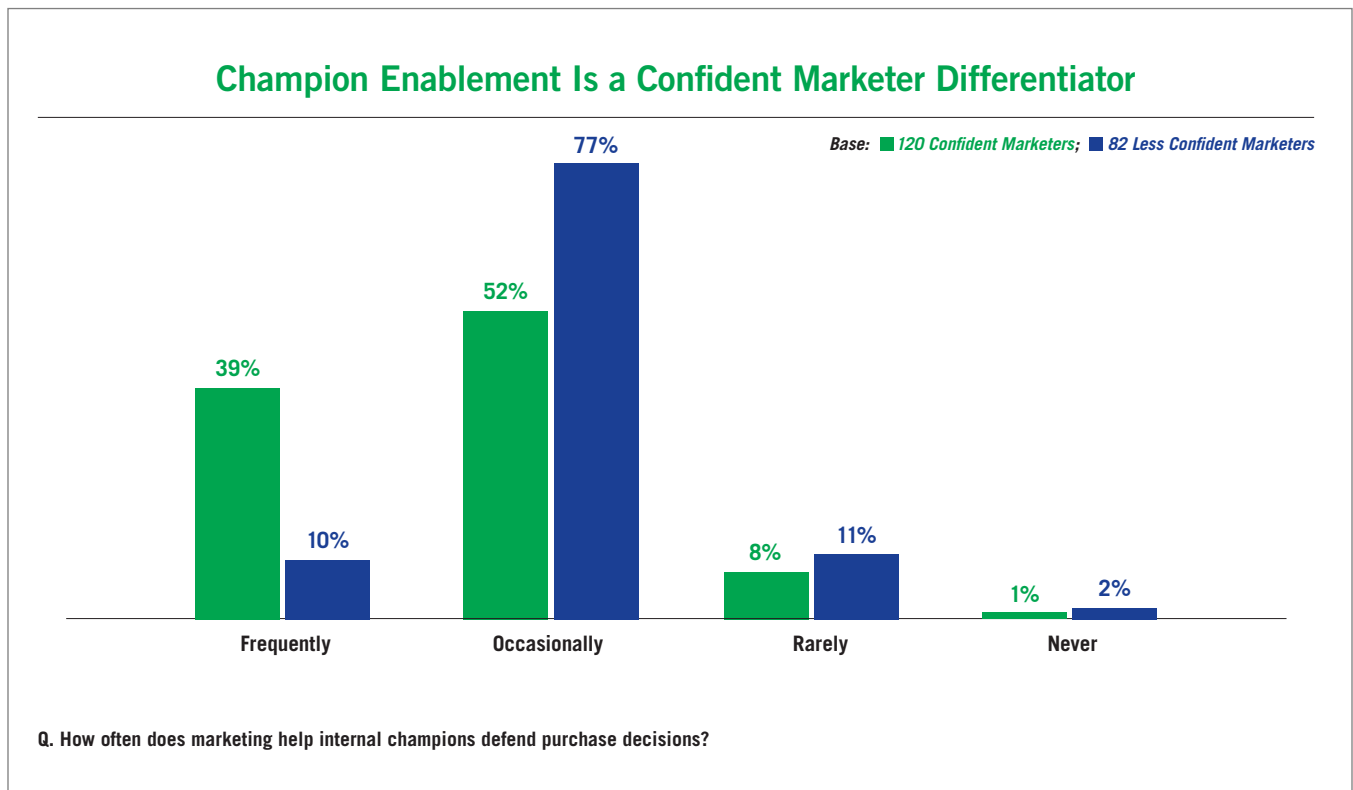
**This campaign was recognized in the ANA 2026 B2 Awards as the:**

- **Gold winner in the Integrated Marketing Program: Small or Midsize Business category**
- **Gold winner in the Social Media category**
- **Silver winner in the Brand Purpose category**
- **Bronze winner in the Email category**

## SECTION 4: BUYER GROUP ENABLEMENT

The B2B buying process has changed shape faster in the last two years than in the previous 10, and Confident Marketers have changed with it. The unit of work is no longer the lead. It is the champion — the internal advocate who has to defend a purchase decision to a buying group of six, eight, sometimes 12 people, often including a finance lead, an IT lead, a procurement officer, and increasingly an AI agent doing first-pass vendor research.

Confident Marketers are nearly four times as likely as their less confident peers to say marketing frequently helps champions defend purchase decisions internally, and more than five times as likely to say marketing helps buyers build internal consensus. These are two of the largest single behavioral gaps in the entire study.



### What We Heard from Confident Marketers

**The funnel is no longer linear.** Multiple Confident Marketers, unprompted, used some version of the same phrase: the linear funnel is dead. Modern B2B buying happens across dozens of unattributable touches — peer conversations, podcast clips, AI-assisted research, community forums, dark social — long before a buyer fills out a form, if they ever do. The Confident Marketer response is signal-based orchestration: triggering marketing actions off of observed behaviors (research velocity on a key page, a champion downloading a comparison framework, a sudden cluster of activity from a target account) rather than off a linear stage progression.

*“We’re orchestrating off signals, not stages. The stage is a story we tell ourselves after the fact.”*  
— VP, marketing technology, enterprise SaaS

**Champion enablement is the unit of work.** Confident Marketers describe a deliberate shift in what marketing produces. Less “top-of-funnel awareness,” more internal selling tools — ROI calculators tuned to the champion’s finance conversation, comparison frameworks tuned to the IT lead’s evaluation criteria, executive summary decks tuned to the procurement office’s risk lens. Several Confident Marketers described moving headcount and budget from demand-gen campaigns into champion-enablement asset development over the last twelve months.

*“We’ve stopped chasing leads and started arming champions. Every dollar we used to spend trying to find a buyer, we now spend making the buyer we already have impossible to argue with.”*  
— CMO, B2B technology company

**The AI buyer has arrived.** Eleven of the 23 Confident Marketers we interviewed referenced answer engine optimization (AEO) and generative engine optimization (GEO) as deliberate, named investments. One CMO made an AEO tracking tool the single largest marketing investment of his year. The logic is simple: a meaningful and growing share of vendor evaluation is now happening through AI agents and AI-assisted research before a human buyer ever visits a website. Several Confident Marketers described deliberately ungating high-stakes content to feed it to the AI.

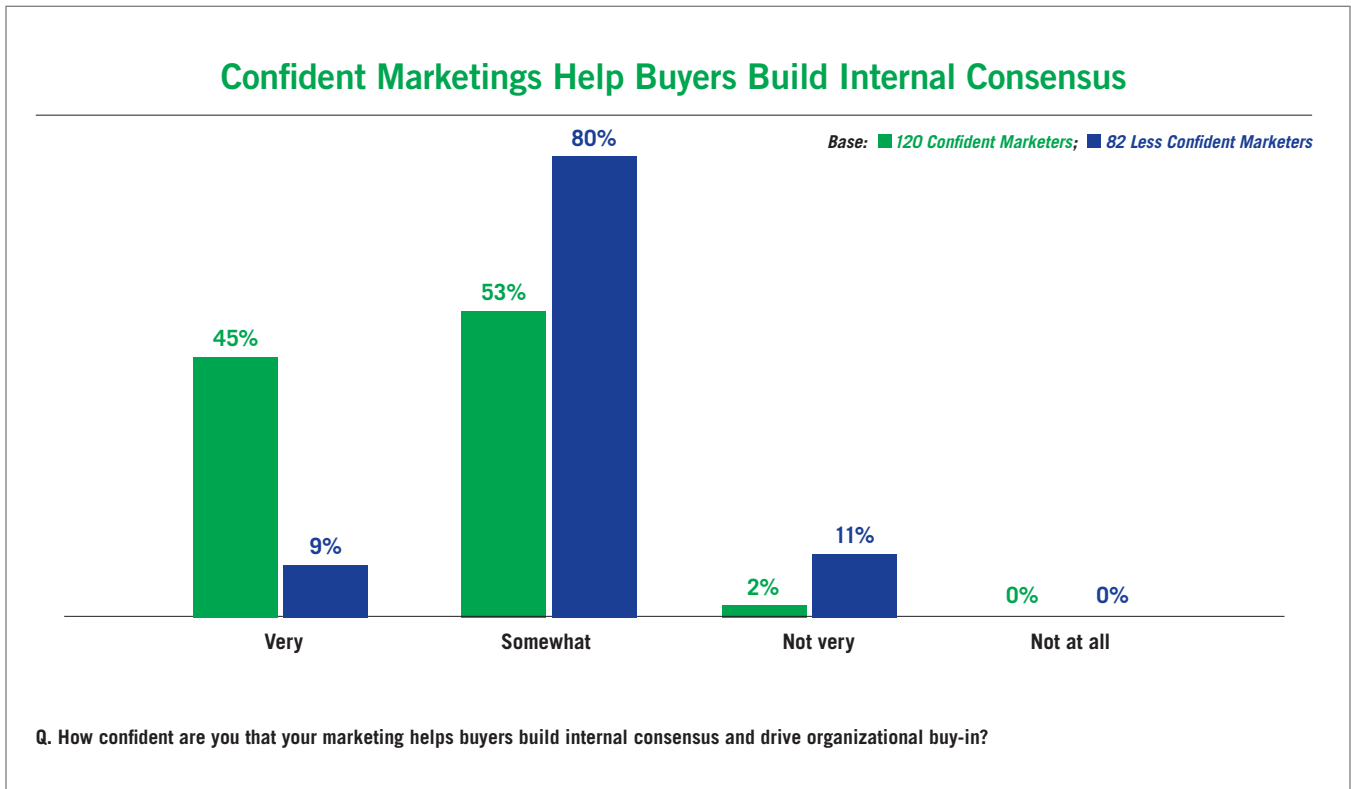
*“AI doesn’t do well with gated content. I don’t play the gated content game, and AI loves that.”*  
— CMO, B2B SaaS

**Pipeline quality replaces pipeline volume.** Confident Marketers describe a quiet but consistent metric shift: away from MQL volume and toward measures of fit-to-ICP (Ideal Customer Profile), sales velocity inside the buying group, reduction in late-stage uncertainty, and win rate on accounts marketing has actively enabled. Section 6 examines the resulting sales-marketing relationship in detail; the foundation of the shift sits there.

## SECTION 4: BUYER GROUP ENABLEMENT

### What the Data Shows

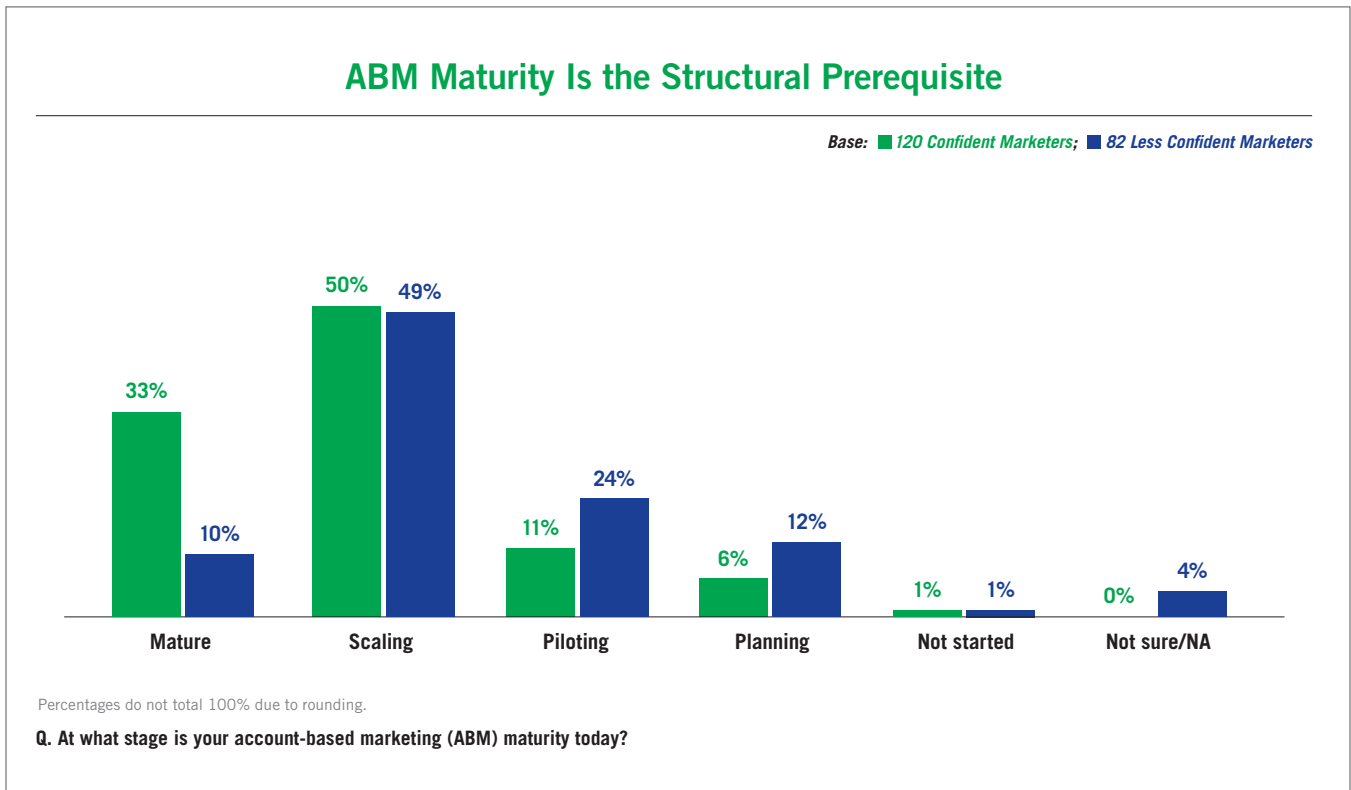
The behaviors most associated with buying-group impact — champion defense, internal consensus, ABM maturity — are also where Confident Marketers have built the most distance.



This is the cleanest behavioral split in the section. Buyer-group consensus isn't a feeling — it's a measurable outcome: shorter time between first champion engagement and decision, fewer late-stage objections, and higher close rates on enabled accounts. Almost half of Confident Marketers say their marketing reliably produces it. Almost no one else does.

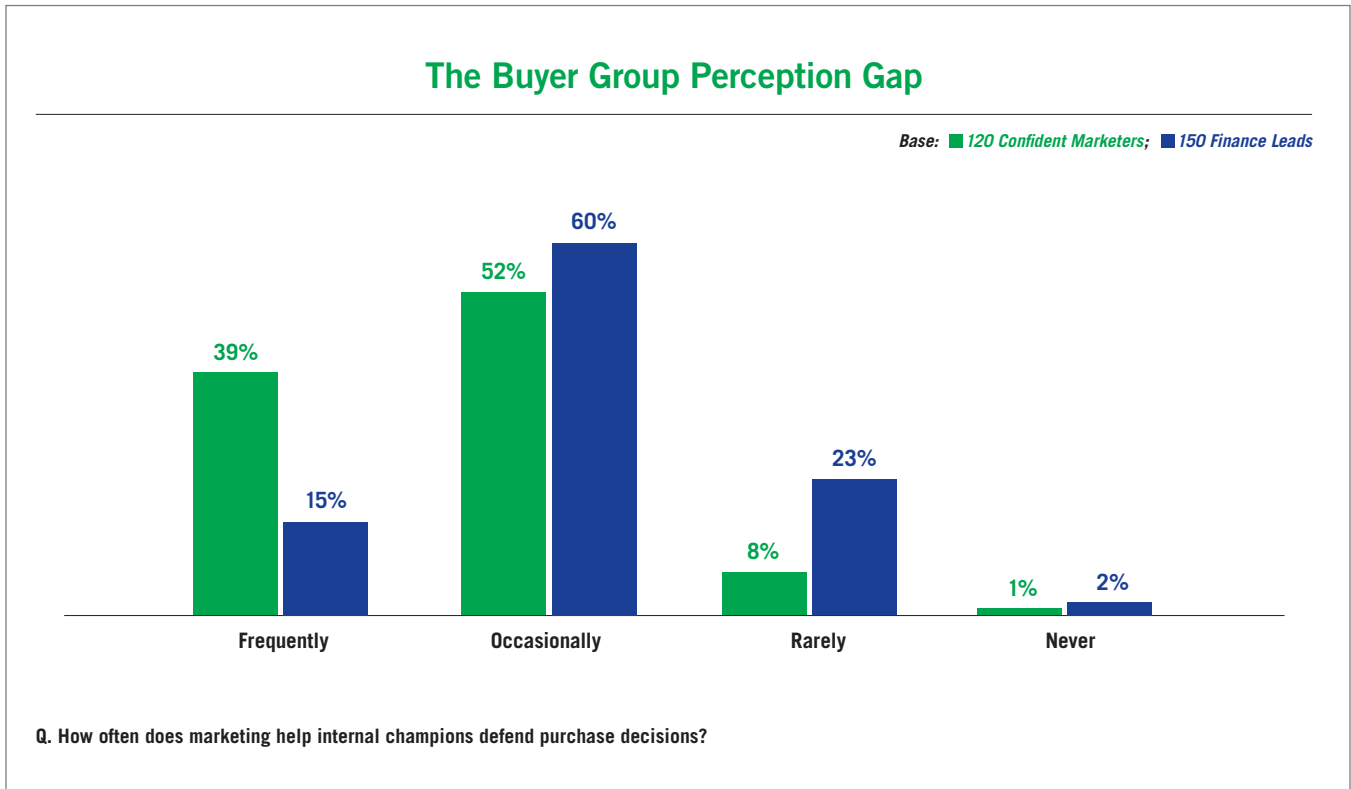
## SECTION 4: BUYER GROUP ENABLEMENT

ABM maturity is the foundation for everything else in this section. You can't run signal-based orchestration without account-level data infrastructure. You can't enable a champion you haven't identified. The 33 percent/10 percent maturity gap reflects, more than anything else, years of investment Confident Marketers made earlier — and that less confident peers are now trying to compress into a single planning cycle.



## SECTION 4: BUYER GROUP ENABLEMENT

The finance and revenue survey introduces the section’s most important tension. Marketers report helping champions defend purchase decisions frequently 39 percent of the time. Finance and revenue leaders see it happening only 15 percent of the time. The 24-point perception gap is the largest single misalignment between marketers and their executive colleagues in the entire study.



Two interpretations are plausible, and both are probably true. The first: marketers and finance and revenue leaders are using different definitions of “champion defense” — marketers count the asset and finance and revenue counts the deal won. The second: marketing is producing the enablement and sales is failing to deploy it inside the buying group. Either way, the implication is the same. Champion enablement only matters if it ends up in the room where the decision gets made — and right now it’s clearly not getting there often enough.

#### SECTION 4: BUYER GROUP ENABLEMENT

The finance and revenue survey also tells marketers where to focus. When finance and revenue leaders are asked where buyer group friction most often stalls deals, 43 percent point to the business case justification stage and 35 percent to solution evaluation. These are the two stages where champion enablement assets — ROI calculators, comparison frameworks, executive summaries — most directly help. The marketers who close the perception gap will be the ones who arm sales to win these specific moments.

“*The marketing organizations that have the most credibility with us are the ones that show me a pipeline I’d actually want to forecast against. Volume without quality just means more meetings.*”  
— **head of commercial finance, medical device manufacturer**

## SECTION 4: BUYER GROUP ENABLEMENT

### How to Be a Confident Marketer in Buyer Group Enablement

- 1. Make the champion the unit of work.** Audit how much of your marketing output exists to attract a buyer versus to equip the buyer you already have. Confident Marketers shift the ratio meaningfully toward enablement — ROI calculators, comparison frameworks, executive summaries, internal-selling decks — and resource it as deliberately as they resource demand generation.
- 2. Close the perception gap with sales.** Champion enablement only counts when it's used. Track which assets land inside which deals and treat enablement adoption by sales as a primary metric — not just enablement production by marketing.
- 3. Focus on business case and solution evaluation.** Finance and revenue leaders identify these as the two stages where deals stall most often. Build the assets that disarm objections at exactly these moments — and rehearse them with sales before the deal arrives.
- 4. Mature the ABM foundation, even if it takes another year.** ABM maturity is not a campaign; it is the account-level data and orchestration infrastructure that makes every other capability in this section possible. Confident Marketers got here through years of investment, not a quarter of it.
- 5. Build for the AI buyer — they're already evaluating you.** Restructure your highest-stakes content (solution overviews, comparison frameworks, customer proof) for machine readability. Use clean schema, structured comparisons, and explicit factual claims. Consider ungating the content you most want AI agents to retrieve and cite. The AI buyer doesn't fill out forms.

**SECTION 4: BUYER GROUP ENABLEMENT**

**The Buyer Enablement Map**

Most champion enablement is built for the champion. The Buyer Enablement Map is built for the room the champion has to win. Finance and revenue leaders in this study identify two stages where deals most often stall: solution evaluation (35 percent) and business case justification (43 percent). The assets below are mapped to those moments — by stakeholder, by stage.

Stakeholder	Mid stage: Solution evaluation	Late stage: Internal defense/business case
<b>Economic Buyer (CFO/VP finance)</b>	ROI model; cost-of-inaction analysis; peer company case studies with financial outcomes	Board-ready business case with financial assumptions finance can audit; risk mitigation summary
<b>Champion (director/VP)</b>	Competitive comparison framework; reference calls; proof of concept results	Internal pitch deck; objection handling guide; executive summary tuned to CFO language
<b>Technical Evaluator</b>	Integration architecture overview; security posture; compliance certifications	Total cost of ownership model; implementation timeline; IT risk summary
<b>End User</b>	Trial access; adoption playbook; workflow integration guides	Change management narrative; productivity impact data; peer community proof
<b>AI Agent/Research Tool</b>	Schema-ready comparison content; structured differentiation signals; ungated solution overview	Cited, verifiable claims with traceable sources; metadata-rich pages built for machine retrieval

Thirty-nine percent of Confident Marketers say they frequently help champions defend purchase decisions internally, versus 10 percent of less confident marketers. Finance puts that number at 15 percent. The gap is not effort. It is targeting. The champion needs assets built for the economic buyer, the technical evaluator, and the AI agent doing first-pass research — not just for themselves.

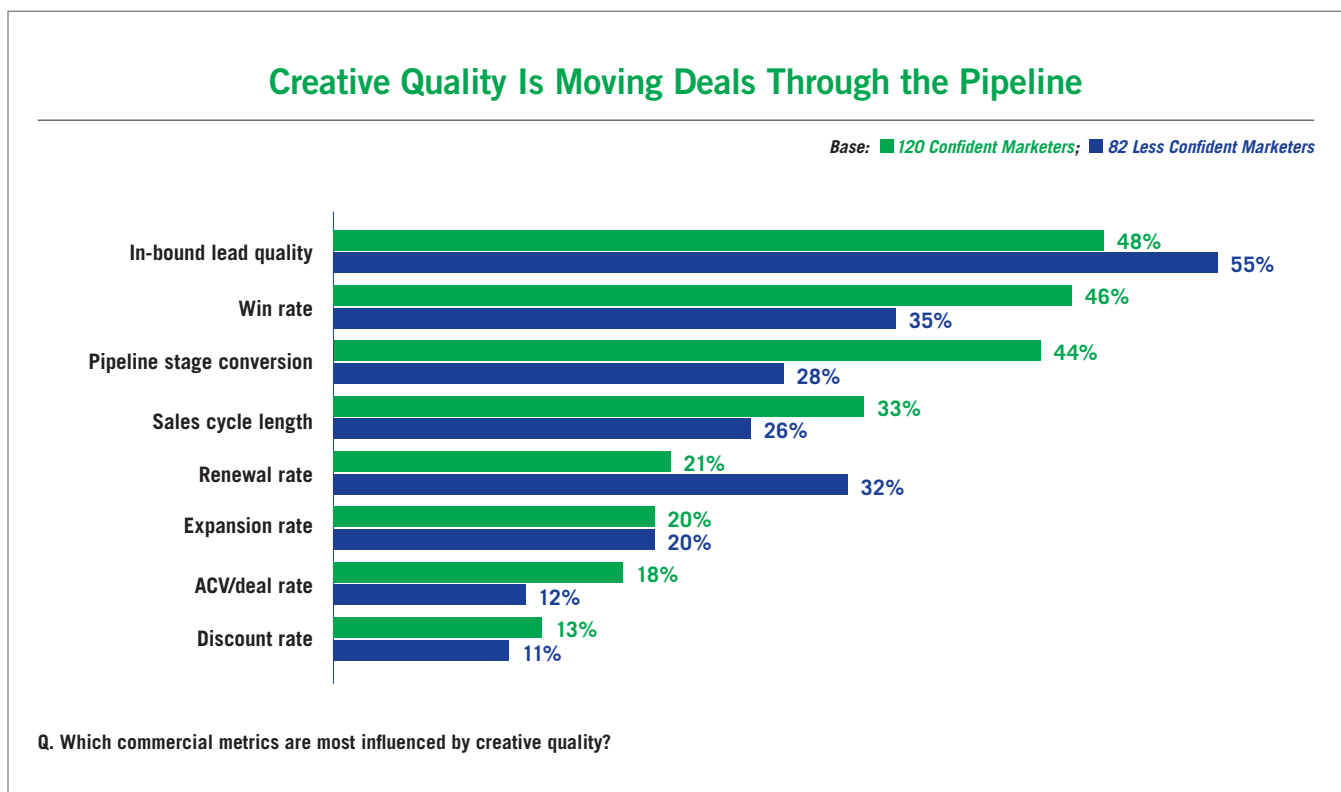
## SECTION 5: CREATIVE EFFECTIVENESS AND COMMERCIAL OUTCOMES

In a market where AI has driven the cost of producing competent B2B content toward zero, the marginal value of “professional-looking” creative has collapsed. Multiple Confident Marketers named this dynamic, unprompted, the “great flattening” — the moment when categories flood with content that looks polished and says nothing, when competitive distinctiveness erodes, and when pricing power and deal size erode with it.

“Distinctiveness is no longer a creative virtue. It’s a commercial one. The brands that look like every other brand will price like every other brand.”

— SVP, global marketing, enterprise SaaS

Their response is not to produce more. It is to produce less, more sharply, and to use AI aggressively for the work that doesn’t define the brand while protecting the work that does. Confident Marketers are 1.6 times as likely as their less confident peers to say creative quality directly drives pipeline-stage conversion — one of the cleanest creative-to-commercial signals in the survey.



### What We Heard from Confident Marketers

**They named the great flattening before we did.** Confident Marketers independently used either the phrase “the great flattening” or its near-equivalent (“flooded with average, algorithmically perfect noise”) to describe what AI is doing to category creative. They see it as a direct commercial threat: when every competitor’s content sounds the same, distinctiveness erodes, the buyer can’t tell vendors apart, and pricing collapses to the floor.

*“The paradox of AI in creative is that it makes average work extremely cheap and excellent work more valuable than ever. Our category is flooding with AI-generated content that looks professional and says nothing. We’ve made the decision to produce less, not more.”*

— CMO, B2B technology company

**They operate the 80/20 rule.** Confident Marketers describe a deliberate split. The bottom 80 percent — content variants, personalization, localization, performance creative — is AI’s territory. The top 20 percent — distinctive thought leadership, brand-defining creative, original research, executive-grade sales assets — is human territory, often with AI as research support but never as the originator. The discipline isn’t anti-AI. It’s about where AI gets used and where it gets kept out.

**They tie creative directly to commercial outcomes.** This is where Confident Marketers are most clearly separate from their peers. The interviews surfaced specific, finance-defensible measurement: a CMO at a B2B technology company correlated thought leadership engagement to 15 percent higher ACV in deals where the buyer had engaged with three or more pieces. A VP at a manufacturing company attributed a 15 percent sales lift directly to a brand campaign through holdout testing. A VP of marketing in medical devices walked through ten years of brand history showing direct correlations between brand recognition lift, order intake, and pricing flexibility. Confident Marketers are showing the financial mechanics, not arguing creative’s value in the abstract.

**They use AI as a research partner, not a replacement.** Several Confident Marketers described AI as the most powerful creative research tool they’ve ever had — for synthesizing customer interviews, mapping competitor messaging, surfacing language patterns, and identifying whitespace. But the actual creative work — the headline, the framing, the point of view — is still human. AI gives you the inputs. Humans make the call.

## SECTION 5: CREATIVE EFFECTIVENESS AND COMMERCIAL OUTCOMES

### What the Data Shows

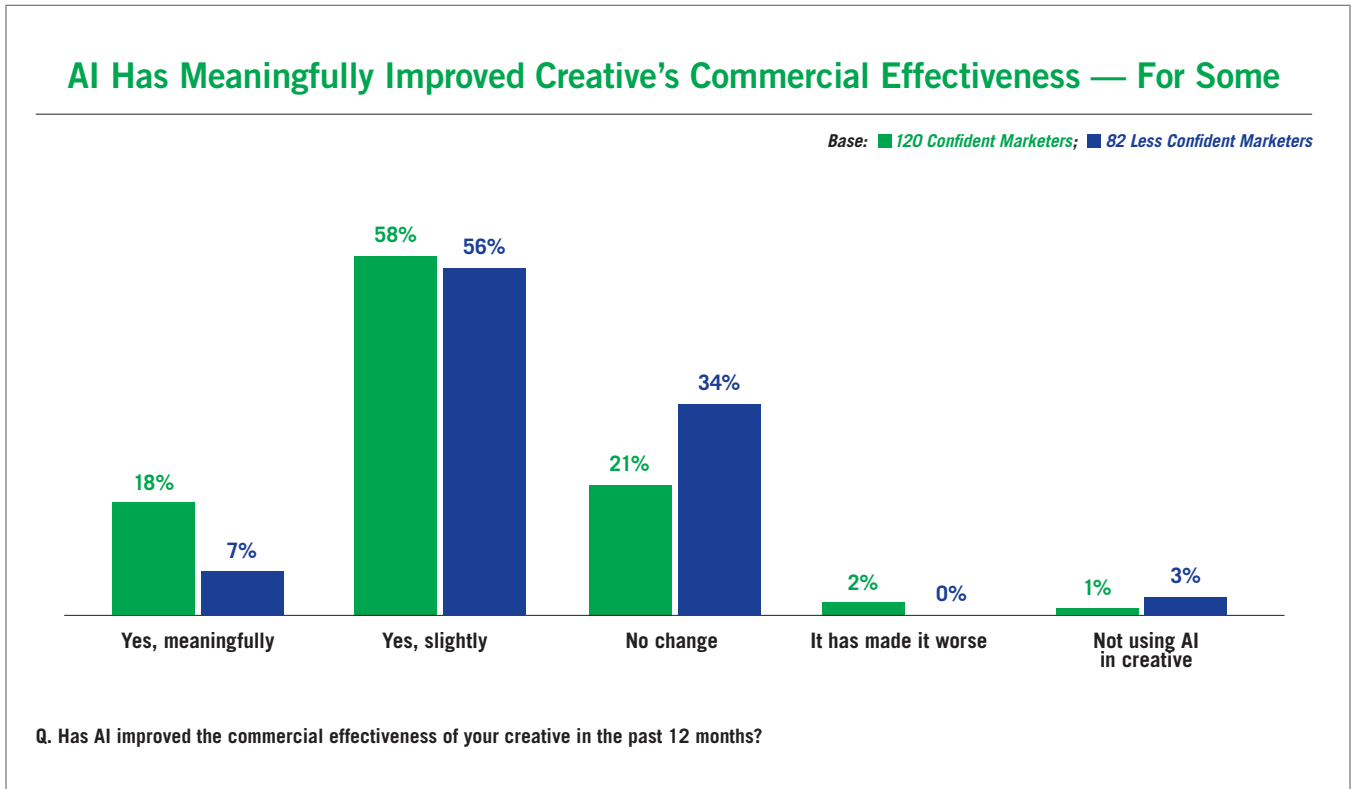
The behavioral split on how marketers treat thought leadership is one of the section's clearest signals.



Confident Marketers are more than three times as likely to treat thought leadership as a strategic asset rather than a content tactic. The gap reflects a deliberate organizational choice — what gets resourced, what gets reviewed, what gets measured against commercial outcomes rather than engagement metrics.

## SECTION 5: CREATIVE EFFECTIVENESS AND COMMERCIAL OUTCOMES

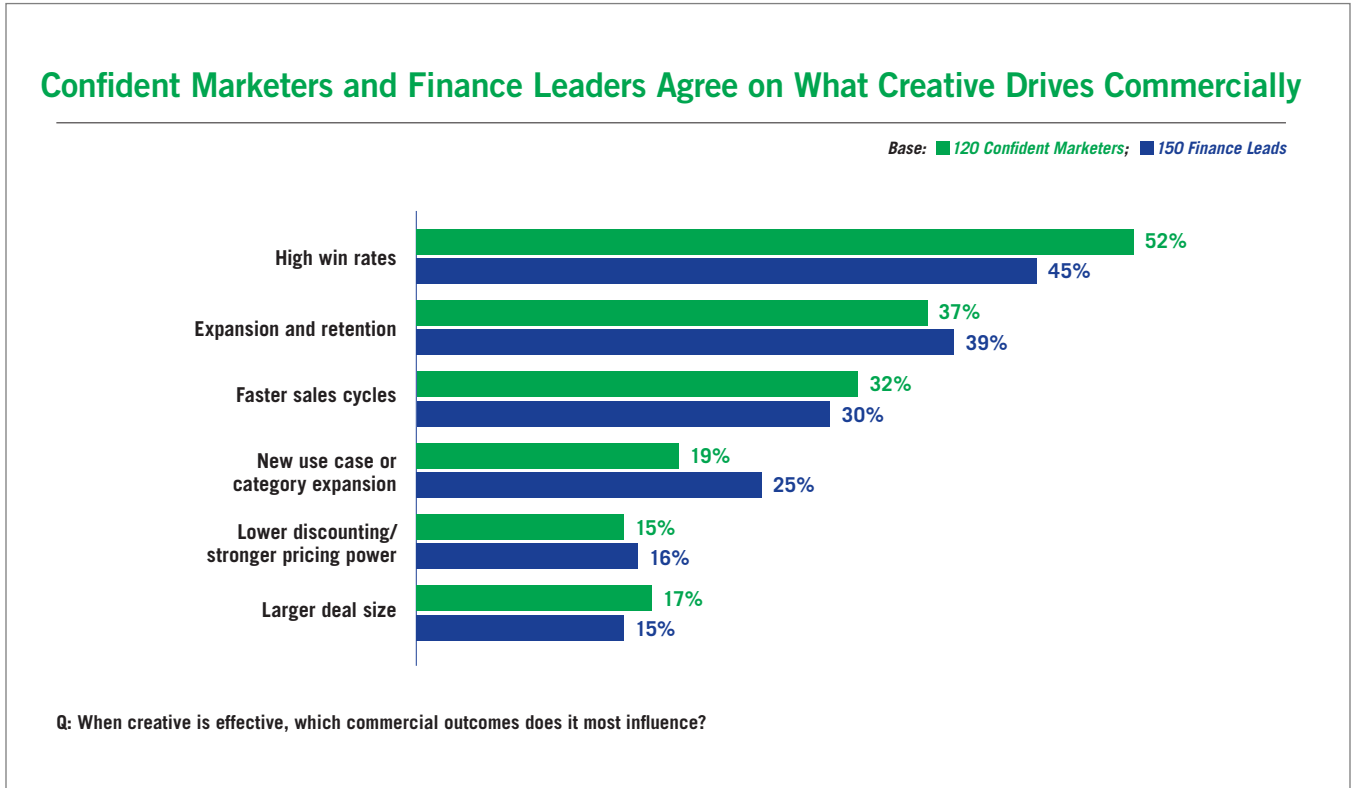
The second signal is asymmetric in a way that should change how marketers think about AI in creative. Confident Marketers are 2.5 times as likely as their less confident peers to say AI has meaningfully improved their creative's commercial effectiveness — not just their creative output, but the financial outcome creative produces.



The implication: AI doesn't make creative more commercially effective on its own. It makes creative more commercially effective when it sits inside an organization that already knows how to measure creative's commercial impact. Marketers who can't show creative's contribution to revenue today won't suddenly be able to show it because they used AI to produce more of it.

## SECTION 5: CREATIVE EFFECTIVENESS AND COMMERCIAL OUTCOMES

The finance and revenue survey produces the most actionable insight in the section — and it cuts the opposite direction from what marketers might expect.



The most useful finding in this section may be the one the data forced us to revise: marketers and finance and revenue leaders see creative’s commercial role almost identically. On expansion and retention, Confident Marketers and finance and revenue leaders land within two points. On faster sales cycles, the same. The translation problem most marketers fear when they walk into a finance review on creative spend isn’t a disagreement about what creative drives. It’s a disagreement about whether the proof is good enough.

“Marketing has to be judged the same way I’m judged, the same way the sales team is judged. Are we signing up more customers than we’re losing? Are we getting paid more for them? That’s the whole ballgame. Creative is part of that — but only if you can show me how.”

— CFO, multi-brand B2B SaaS

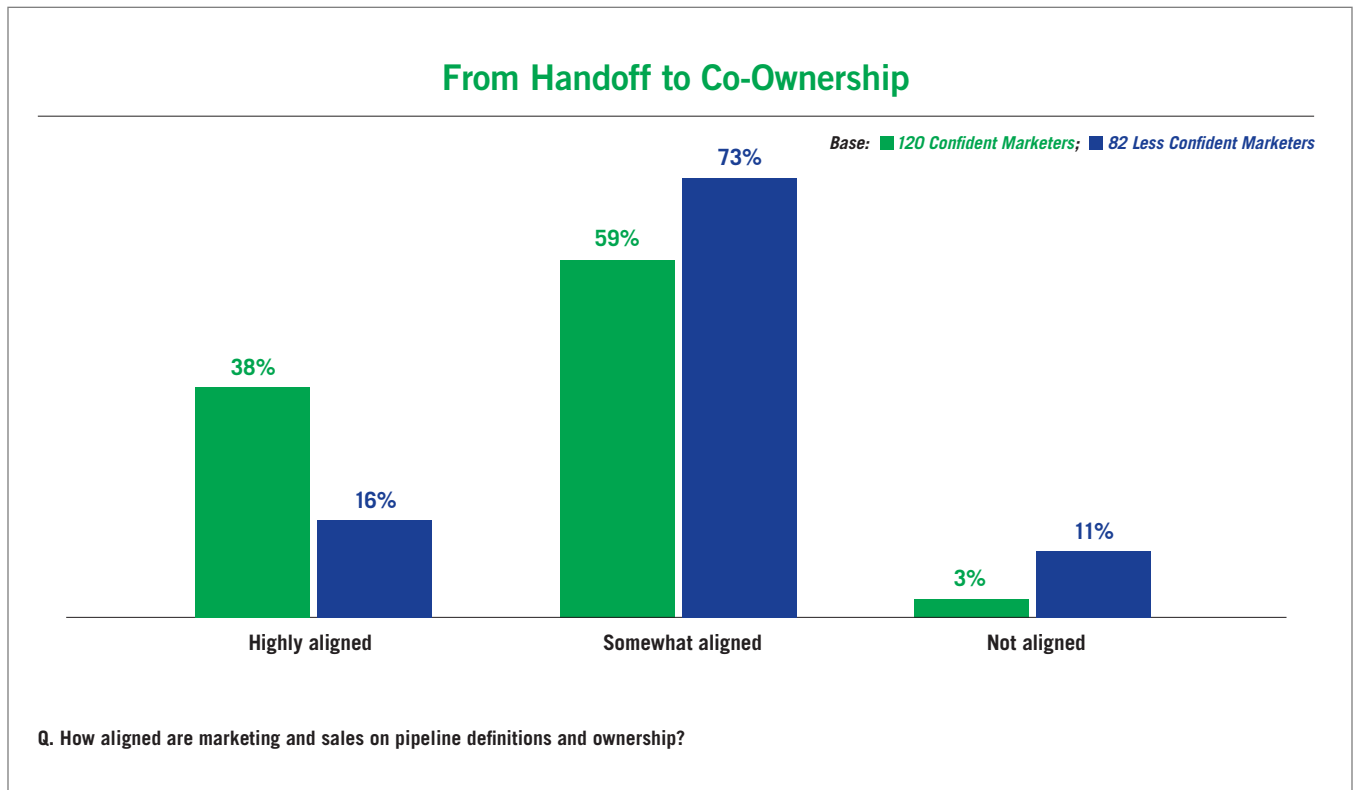
## SECTION 5: CREATIVE EFFECTIVENESS AND COMMERCIAL OUTCOMES

### How to Be a Confident Marketer in Creative

- 1. Adopt the 80/20 rule explicitly.** Decide, as a team, which categories of creative are AI's territory, and which are protected. The discipline is in writing it down and holding the line — not in the percentages.
- 2. Produce less.** Sharpen more. In a flattened market, distinctive output is the moat. Cut the volume of average content; reinvest the savings into the small number of pieces that actually carry a point of view.
- 3. Treat thought leadership as a strategic asset, not a content tactic.** Resource it that way: senior authorship, original data, deliberate distribution, measurement against commercial outcomes — not impressions and downloads. The 38 percent/22 percent gap on this single behavior tracks more closely with marketing confidence than almost any other creative practice.
- 4. Use the retention and expansion story.** Marketers and finance leaders largely agree that creative can influence expansion, retention, and sales-cycle speed. Build the case studies that connect distinctive creative to renewal rates, expansion revenue, and customer LTV — and put them in front of finance before the next budget conversation.
- 5. Translate creative wins into finance's vocabulary.** The proof points that defend creative spend are pipeline quality, win rate, retention, and pricing power. Build the dashboards and the case studies in those terms before the next budget

## SECTION 6: REVENUE ALIGNMENT AND SALES PARTNERSHIP

In 2025, the question was whether sales and marketing were aligned. In 2026, Confident Marketers have moved past it. The conversation now is about co-ownership — of pipeline quality, of velocity, and of the revenue number itself. Confident Marketers are nearly 2.5 times as likely as their less confident peers to be highly aligned with sales on pipeline definitions. The most credible Confident Marketers don't describe alignment as a relationship. They describe it as a shared P&L responsibility.



### What We Heard from Confident Marketers

The interviews told a tighter story here than in any other section because the move is concrete: Confident Marketers have replaced the lead-handoff model with shared ownership of revenue outcomes. The mechanics vary by industry, but the principles do not.

**MQLs are being retired.** Across the interviews, Confident Marketers described moving away from MQL targets as a primary metric. Not because lead generation stopped mattering, but because the metric itself stopped predicting revenue. The replacement is some combination of pipeline quality, deal velocity, win rate within ICP, and sourced or influenced revenue. As one CMO put it, “MQLs were a metric we owned and sales didn’t care about. The day we killed them and started co-owning pipeline quality was the day sales started returning my calls.”

**Joint forecasting is the new operating cadence.** Several Confident Marketers described moving from monthly marketing-only pipeline reviews to weekly joint forecasting meetings with sales ops and, in many cases, finance. The shift is structural — same data, same dashboard, same definitions. Where it works, it eliminates the seam finance most distrusts: the moment marketing claims a number sales doesn’t recognize.

**Pilot and driver, not co-pilot.** One of the cleanest models in the entire dataset came from a chief commercial officer who owns both sales and marketing for a global telecom. Marketing flies the brand and demand engine. Sales executes the commercial outcome. Both are accountable to the same number. The structure removes the alignment problem by removing the seam.

*“Within my department, marketing is the pilot for me. It needs to see each and every line of aspect covered in his portfolio. As the chief commercial officer, I’m the driver for the review for the organization. But that doesn’t work without the pilot.”*

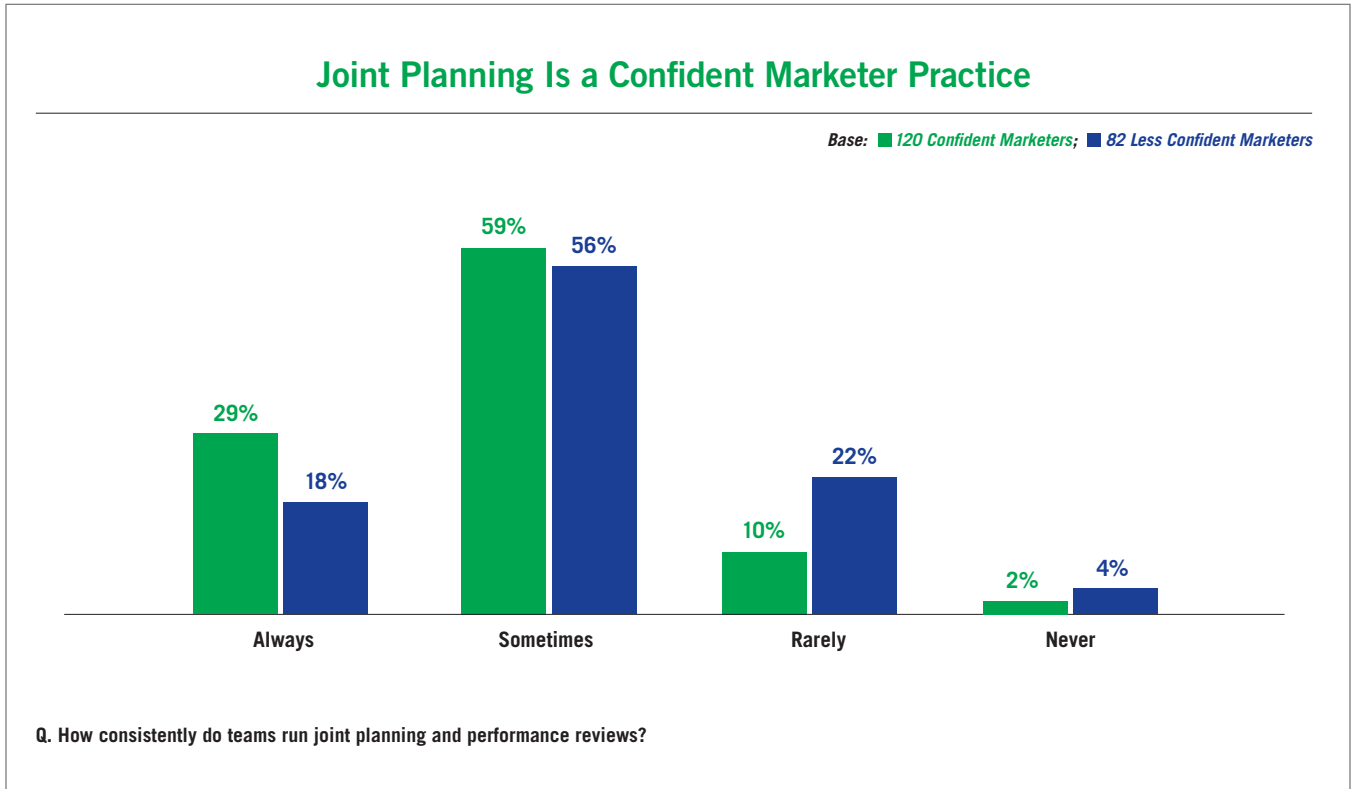
*— chief commercial officer, global telecommunications group*

**Authority is industry-shaped — and Confident Marketers know it.** The most honest finding in the qualitative discussions: in SaaS and financial services, marketing increasingly has equal — sometimes greater — authority in the forecast room. In regulated, physical-product industries (medical devices, CPG, industrial manufacturing), sales typically still wins the tiebreaker. Confident Marketers in those industries fight a different battle — earning influence rather than authority through pre-built, finance-grade evidence — but the destination is the same.

## SECTION 6: REVENUE ALIGNMENT AND SALES PARTNERSHIP

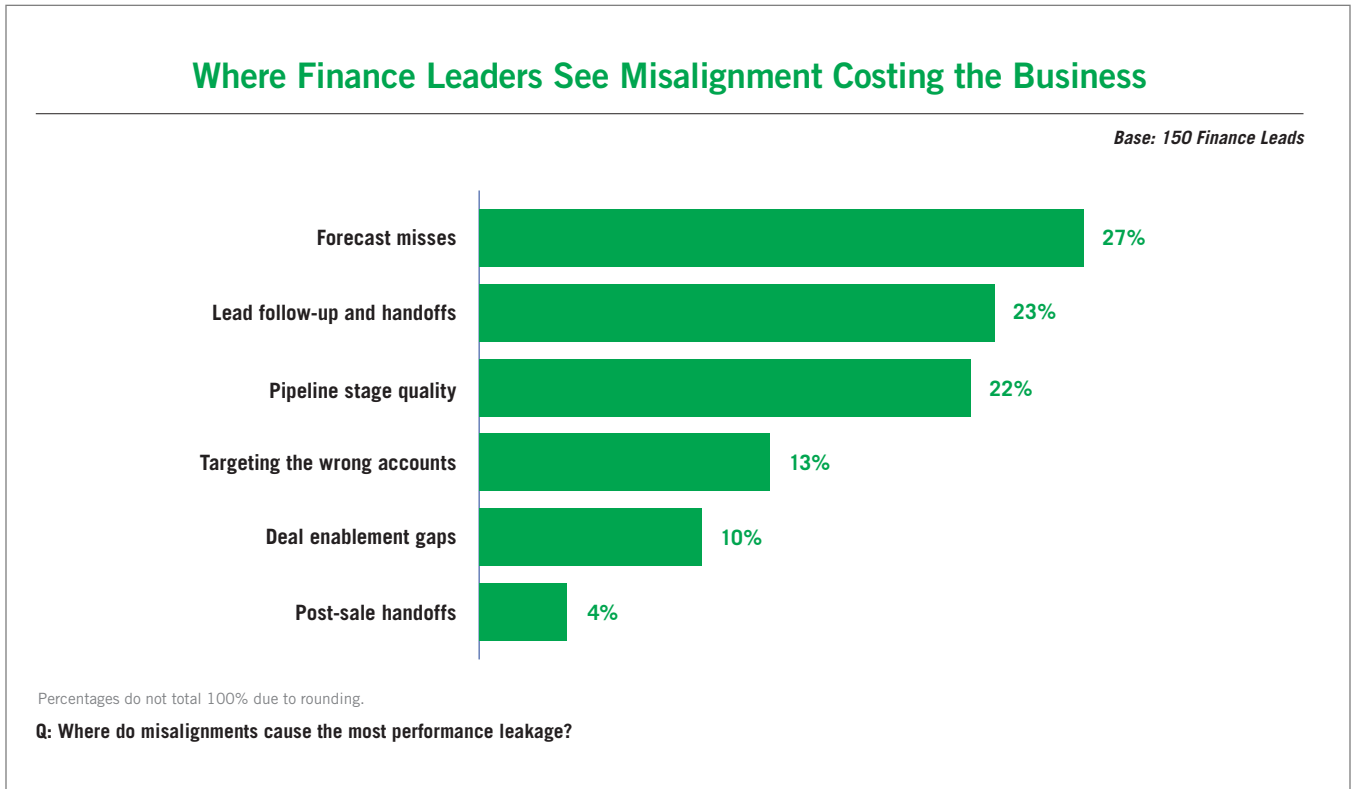
### What the Data Shows

The behavioral split on operational discipline is one of the section’s clearest signals. Confident Marketers are 1.6 times more likely to run joint planning and performance reviews with sales on a consistent cadence — not as a quarterly ritual, but as a weekly operating rhythm.



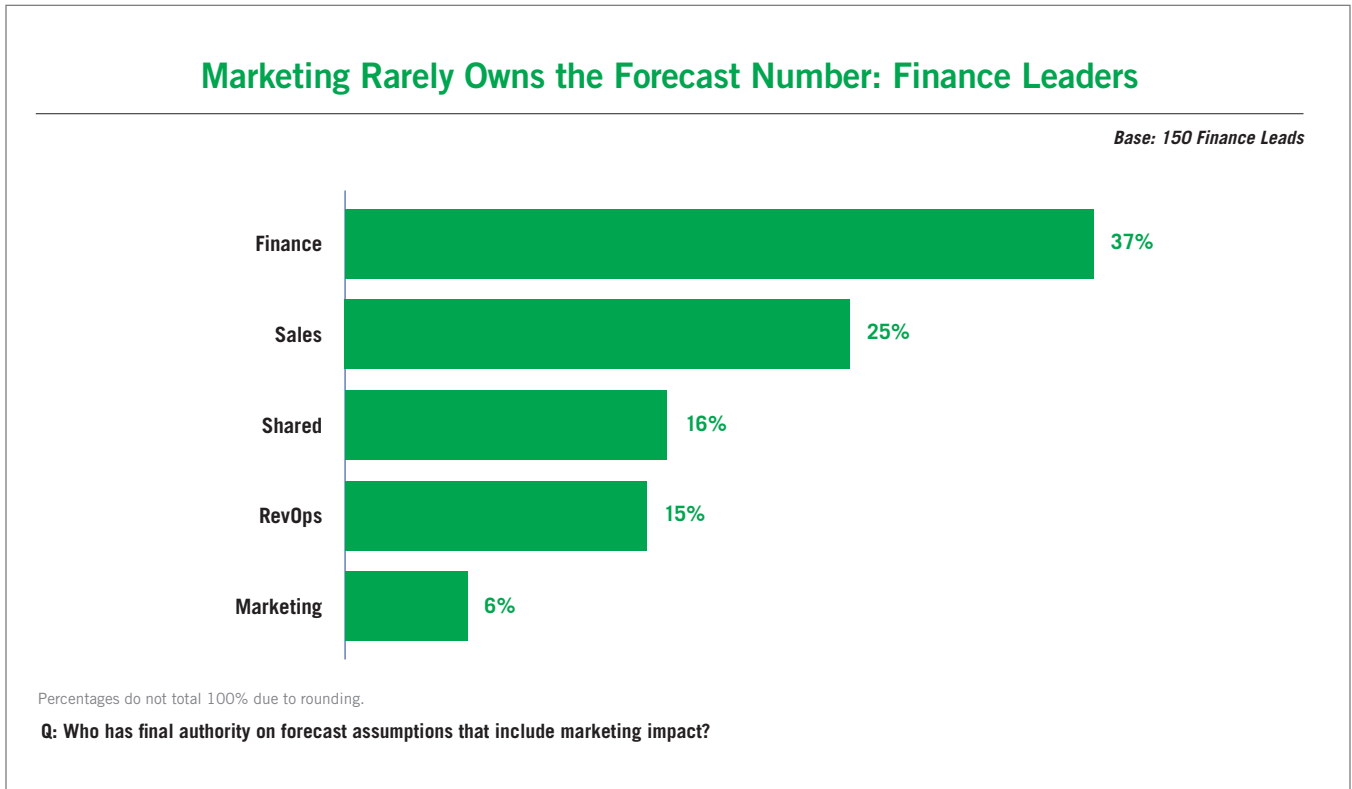
## SECTION 6: REVENUE ALIGNMENT AND SALES PARTNERSHIP

The finance and revenue survey introduces the section's hardest truth. When we asked finance and revenue leaders where misalignment between sales and marketing causes the most performance leakage, the top three answers were specific and consistent: forecast misses (27 percent), lead follow-up and handoffs (23 percent), and pipeline stage quality (22 percent) — inflated pipeline and weak qualification.



## SECTION 6: REVENUE ALIGNMENT AND SALES PARTNERSHIP

When finance and revenue leaders are asked who, in their organization, has final authority on forecast assumptions that include marketing impact, just 6 percent name marketing. Most point to finance (37 percent) or sales (25 percent); the remaining authority sits in shared or RevOps-led models. Even when RevOps and shared models are combined, they outweigh marketing by more than five to one.



This is the chart Confident Marketers in physical-product and regulated industries should show their leadership teams. Authority over the forecast is not a function of marketing's competence — it is a function of who carries the quota and who closes the books. Confident Marketers who succeed in this environment don't fight for equal vote. They build pre-built, finance-grade evidence and earn a seat at the table over years, not quarters.

## SECTION 6: REVENUE ALIGNMENT AND SALES PARTNERSHIP

*“What makes me trust marketing is that expectations are set ahead of any discussion. We agree on what ‘pipeline’ means before the quarter starts, not after the miss. That’s how I generate trust. That’s how I generate a partnership.”*

**— CFO, multi-brand B2B SaaS holding company**

Finance leaders who have worked across sales, marketing, and finance describe marketing’s forecasting position as uniquely credible — precisely because it sits at arm’s length from commission incentives.

*“I trust a marketing forecast more than I do a sales forecast or a finance forecast. Sales is very incentivized — they get paid based on the forecast and how well they’re doing with the forecast. So they tend to manipulate things. Marketing is kind of one step removed from that, and they’re still familiar with the market.”*

**— CFO, life sciences**

That is a meaningful signal. Finance’s trust in marketing’s forecast input is not held back by competence — it is held back by marketing’s failure to show up with one. The six percent who own forecast authority are not the ceiling. They are the frontier.

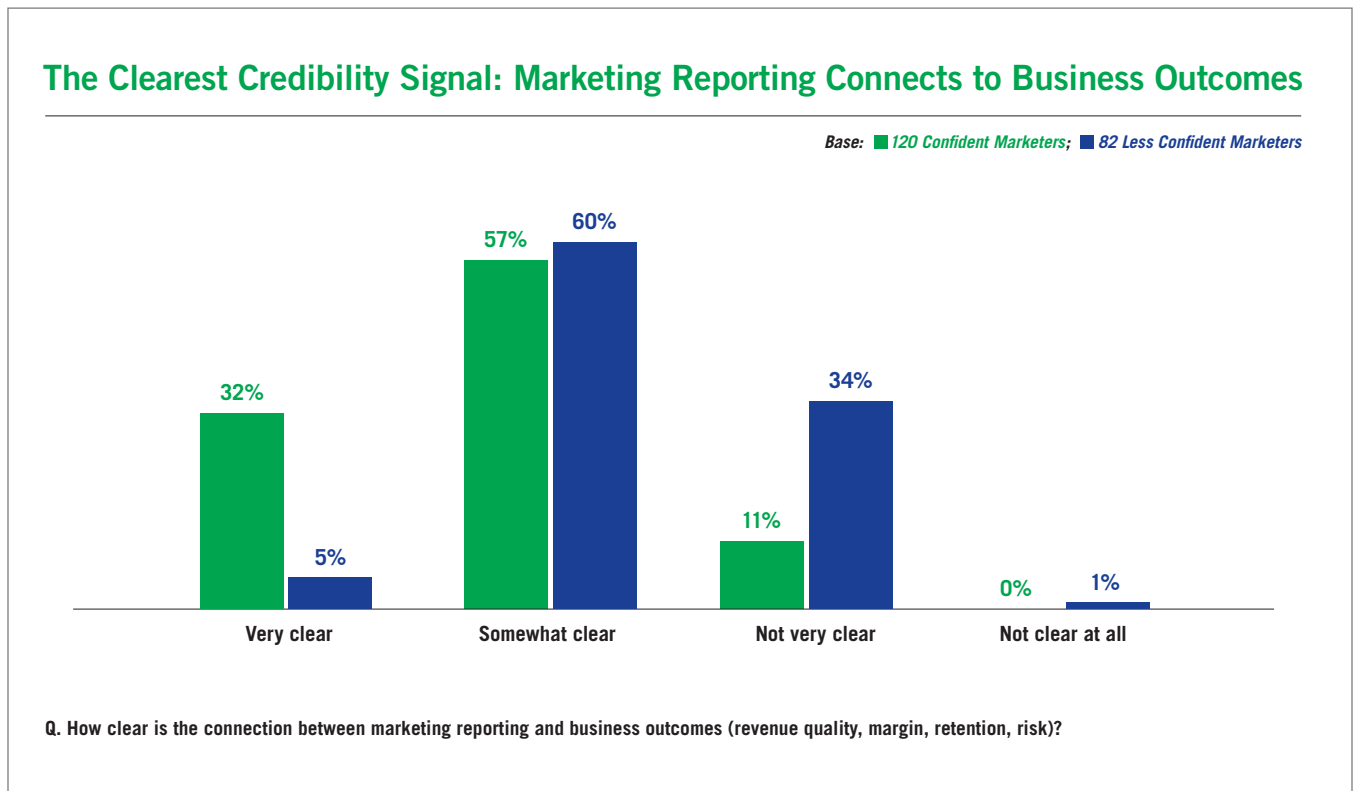
### How to Be a Confident Marketer in Revenue Alignment

- 1. Retire MQLs as a primary target.** Replace with pipeline quality, deal velocity, win rate within ICP, and sourced or influenced revenue. The day the metric changes is the day the conversation with sales changes.
- 2. Define “pipeline” before the quarter, not after the miss.** Joint definitions, agreed in writing, between marketing, sales, sales ops, and finance. The Vocabulary Gap closes here first.
- 3. Operate joint forecasting in a weekly cadence.** Same data, same dashboard, and same definitions. Marketing-only pipeline reviews are a relic — and the 29 percent/18 percent gap on this single behavior is one of the cleanest operational differentiators in the dataset.
- 4. Earn authority where you can’t demand it.** Just 6 percent of finance and revenue leaders say marketing has final authority on forecast assumptions in their organization. In physical-product and regulated industries especially, Confident Marketers don’t fight for equal vote — they build pre-built, finance-grade evidence that earns trust over time.
- 5. Share the downside, not just the win.** Where you can, tie marketing’s accountability to a defined revenue or commercial outcome. Finance and revenue trust is built faster by organizations that share the P&L than by organizations that share only the credit.

## SECTION 7: CREDIBILITY AND MEASUREMENT

Confident Marketers say they can measure marketing’s financial impact. Finance and revenue leaders, surveyed in parallel for the first time, only partially agree. The gap isn’t disbelief; it’s translation. And it is the most expensive cost the field carries in 2026.

Credibility, in 2026, is not a function of measurement sophistication. It is a function of defensibility under pressure — the ability to walk into a finance review and produce evidence in the language finance already uses for every other capital allocation in the business. Confident Marketers have built that ability. Most of their peers have not.



A nearly sevenfold gap on the most basic credibility question (Can a non-marketer follow your numbers to a business result?) sits at the structural center of why the credibility deficit with finance exists in the first place.

## SECTION 7: CREDIBILITY AND MEASUREMENT

### What We Heard from Confident Marketers

The qualitative interviews surface four ideas that, taken together, define how Confident Marketers think about credibility in 2026.

**Marketing as capital allocator, not cost center.** The single sharpest credibility framing in the entire dataset came from a VP of marketing technology in enterprise SaaS. Confident Marketers, he argued, have stopped describing marketing as a function that spends the budget and started describing it as a function that allocates capital across competing investment options — exactly the way the CFO thinks about her job. The shift is more than rhetorical. It changes what marketing reports on (returns on capital deployed, not budget consumed), how it negotiates (marginal ROI of the next dollar, not last quarter's variance), and how finance perceives it.

**Doubles, not home runs.** Multiple Confident Marketers — across industries — described the same operating wisdom: credibility with finance is built through small, repeatable, finance-defensible wins, not through swing-for-the-fences program announcements. One CMO in financial services walked through the lost defense of a celebrity audio program: the ROI was real, but the proof wasn't built in advance. The lesson she took: hit doubles, not home runs. The credibility you build with five clean small wins is bigger than the credibility you build with one big win you can't fully explain.

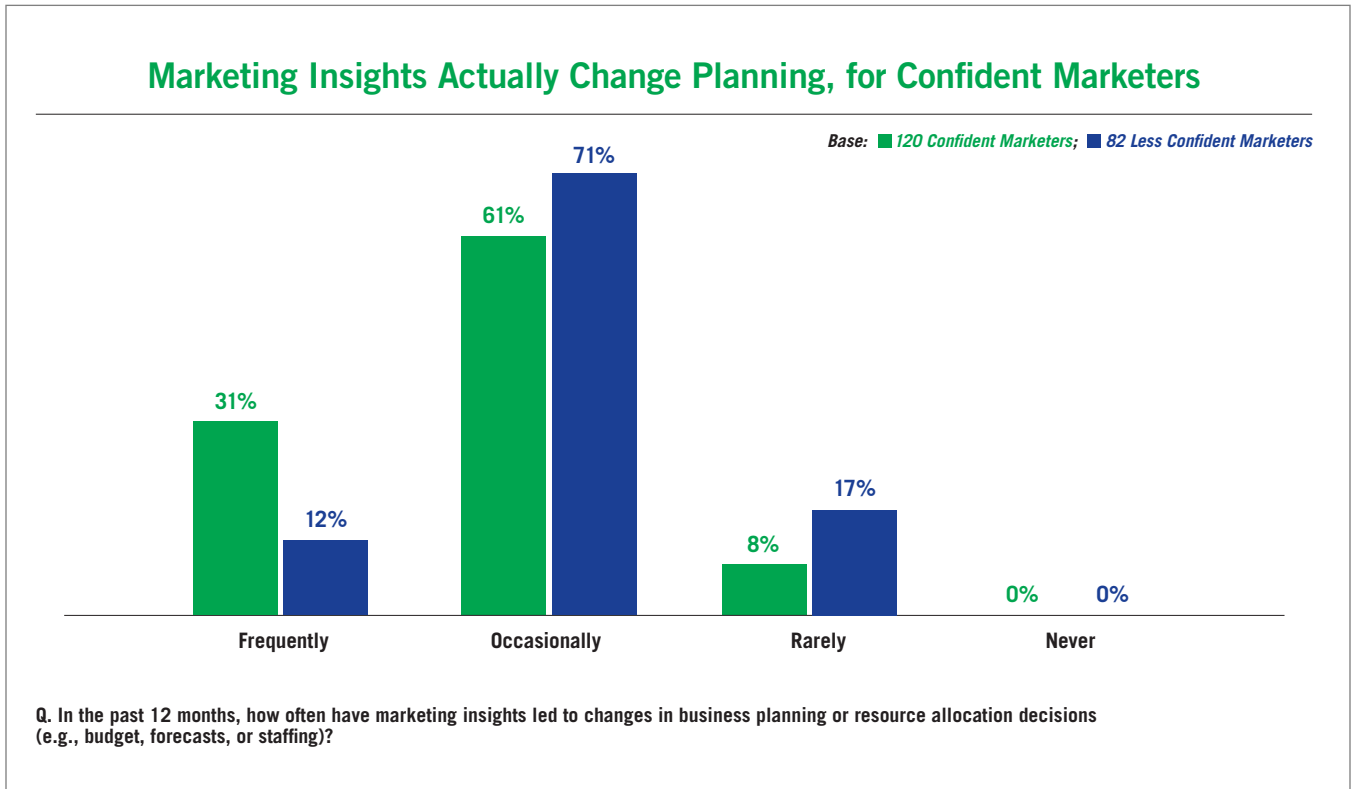
**The “Lost Defense” — what happens when the proof isn't there.** A VP at a pharma company described the only example in the entire dataset of a Confident Marketer losing a budget defense despite having the data. “Honestly, we had all the data we would have needed in any other circumstance to prove the case out. But after seeing that initial data point, the client's mind was made up.” The lesson is uncomfortable but important: defensibility is necessary but not sufficient. The proof has to be built and shared before the conversation, not produced inside it. Confident Marketers who have built genuine credibility describe pre-wiring the case, sharing the model with finance during planning, walking the CFO through assumptions before the budget ask, and surfacing the dark scenario proactively.

**Defensibility, not precision, is the operating philosophy.** Throughout the interviews, Confident Marketers consistently distinguished between measurement precision (getting the number exactly right) and measurement defensibility (being able to explain and defend the methodology under pressure). They prioritize the second. As one CFO interviewed for the report put it: “I don't need marketing's number to be perfect. I need them to be able to walk me through how they got there. That's the difference between a number I can put in the forecast and a number I have to discount.” Confident Marketers have internalized this. Their measurement work is built around evidence tiers — causal, correlational, directional — and they label each one explicitly so finance always knows what kind of claim they're being asked to trust.

## SECTION 7: CREDIBILITY AND MEASUREMENT

### What the Data Shows

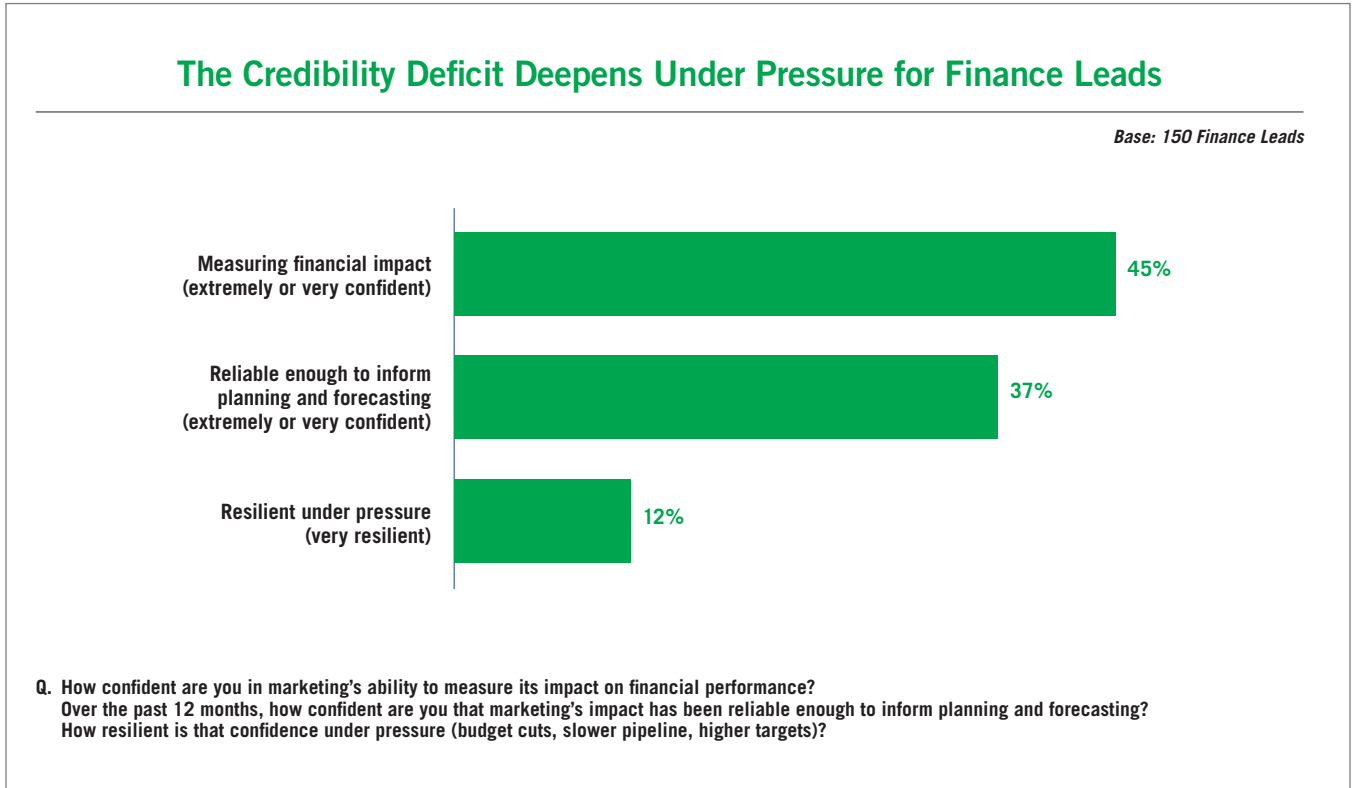
Credibility shows up downstream as influence. The Confident Marketers most trusted by finance also see their work change planning more often.



The asymmetry is causal in both directions: trusted insights change plans, and the insights that change plans build further trust. Confident Marketers are nearly three times as likely as their less confident peers to see their work translate into a budget reallocation, a forecast revision, or a strategic shift.

## SECTION 7: CREDIBILITY AND MEASUREMENT

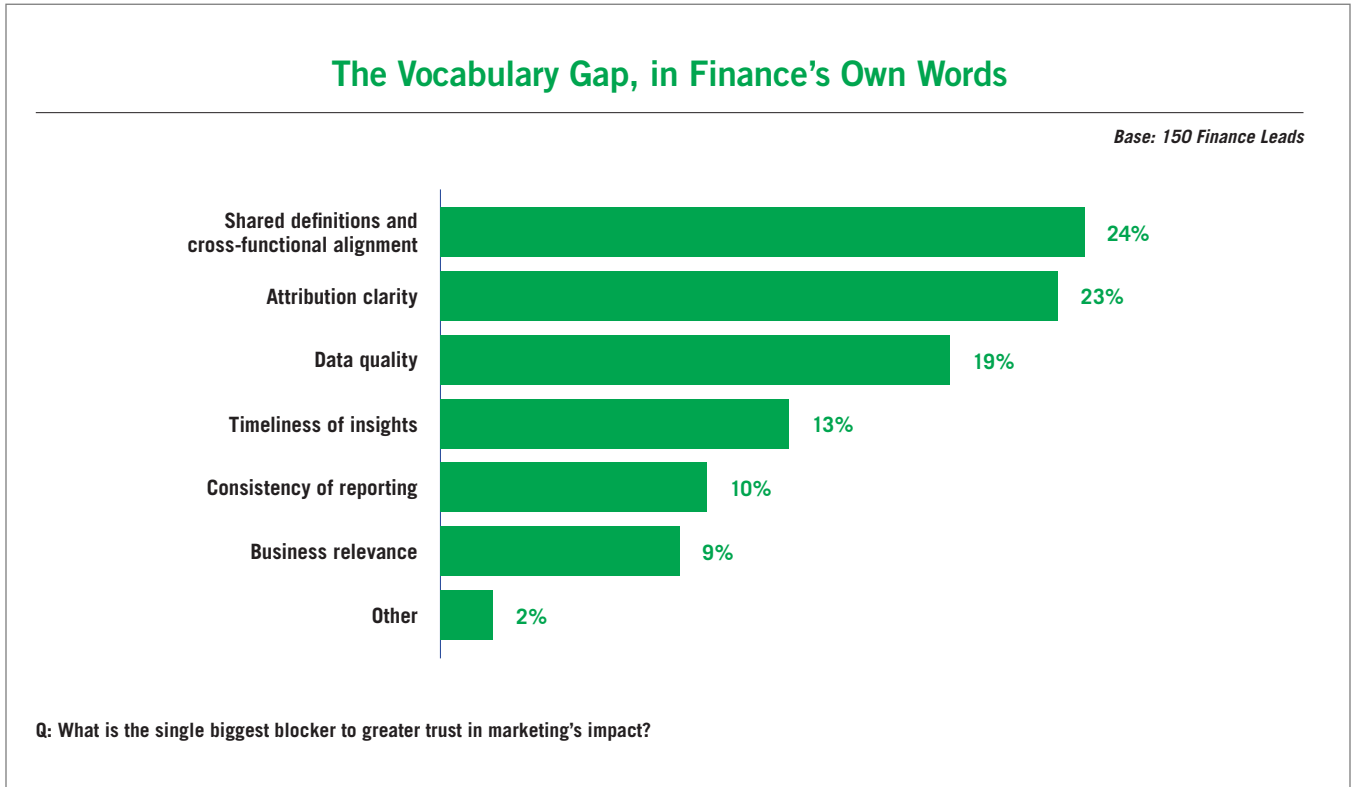
The finance and revenue survey makes the credibility deficit visible — and it deepens the further you push it.



This is the chart that anchors the report. Finance starts at 45 percent — already 14 points behind marketers' self-confidence — and falls another 8 points when asked whether marketing's measurement is reliable enough to put into a forecast. By the time the question is whether marketing's measurement holds under budget pressure, only 12 percent of finance leaders say yes. That is not a measurement problem. It is a credibility problem.

## SECTION 7: CREDIBILITY AND MEASUREMENT

The finance and revenue survey also tells marketers exactly what to fix. When finance and revenue leaders are asked the single biggest blocker to trusting marketing's impact, the top answer isn't attribution sophistication or data infrastructure. It is shared definitions and cross-functional alignment — the Vocabulary Gap, named in finance and revenue's own words.



Shared definitions outrank every measurement issue finance could have named. The implication for marketers is direct: closing the credibility deficit doesn't start with better attribution or more sophisticated dashboards. It starts with making sure marketing, sales, and finance agree on what the words mean — qualified pipeline, active opportunity, forecastable revenue, retention, win rate — before any number gets reported.

“Don't give me fancy presentations. Don't give me lot of things that I cannot substantiate. Stop doing that and focus on hard facts and data.”

— CFO, global CPG

“When the data is compelling, that increases confidence. When things are a little fluffy — a lot of nice presentations and a lot of theory — that's where things get trickier.”

— head of strategy and business planning, investment bank

## SECTION 7: CREDIBILITY AND MEASUREMENT

The standard finance applies to marketing data is consistent across industries: it has to be grounded in external reality, not internal optimism.

*“The more you show me that you used data, especially if it’s from talking with external resources — customers, research analysts, research institutions — the more I trust it. If it’s just a hunch, I understand that we believe this is what’s gonna happen — but why? What drove that conclusion? That’s what’s important for me. Not hunches and thoughts and feelings.”*

— CFO, semiconductor company

And for finance leaders who have been burned by optimistic projections, the most powerful credibility signal is not a single strong result. It is a pattern of delivery over time. One CFO described exactly how that pattern compounds:

*“If marketing can establish a pattern of delivering — you provided a rationale at the onset, you delivered on it. Next time they come with a proposal, I’m probably gonna spend less time and energy challenging it. You promised 50 leads, and it was actually 70. You do it a couple of times. The fourth discussion is gonna be a pretty short discussion.”*

— CFO, digital security and cybersecurity

The implication is direct: credibility is not built in the big meeting. It is built across the small ones — the mini business cases, the delivery check-ins, the moments when marketing said it would do something and then did it. Finance has a long memory for both kinds of evidence.

Perhaps the most counterintuitive insight from the finance interviews is what finance actually values most in a forecast. It is not optimism. It is precision — and in particular, the willingness to project bad news.

*“There is nothing finance people like more than hitting a forecast. The worst thing is to miss a forecast, but almost the second worst thing is to exceed it — because both of them require explanation. The best thing is to accurately forecast and hit it.”*

— CFO, life sciences

*“One sign of credibility would be if a forecast is projecting revenue going down. You will almost / never see a forecast showing revenue going down. And I think if they have a forecast showing it’s going down, that gives them more credibility — and then also if they can give specific reasons why they think it’s going down and the timing of why.”*

— CFO, life sciences

For Confident Marketers, this reframes what a credible forecast looks like. Finance does not want marketing to come in with the best-case number. They want marketing to come in with the right number, including, when the data supports it, a number that trends down. That is the forecast finance can actually use. And it is the forecast that builds the kind of trust that survives budget pressure.

## SECTION 7: CREDIBILITY AND MEASUREMENT

### How to Be a Confident Marketer in Credibility and Measurement

- 1. Operate as a capital allocator, not a budget owner.** Reframe internal reporting around returns on capital deployed, not budget consumed. Negotiate in marginal-ROI terms (What does the next dollar produce?), not in variance-against-plan terms.
- 2. Build credibility through doubles.** Five clean, defensible, repeatable wins build more finance trust than one big initiative you cannot fully explain. Resist the urge to swing for the fences before the proof infrastructure is in place.
- 3. Pre-wire every major investment.** Agree on success criteria, measurement methodology, and the dark-scenario contingency with finance before the quarter begins. The credibility battle is won before the budget review starts.
- 4. Use evidence tiers explicitly.** Label every marketing claim as causal, correlational, or directional. Finance trusts marketers who tell them what kind of evidence they're being asked to trust — and distrusts marketers who present everything as equally certain.
- 5. Close the Vocabulary Gap before you do anything else.** Finance's number 1 blocker to trusting marketing isn't attribution or data — it's shared definitions across marketing, sales, and finance. Settle the language before the next planning cycle. Every other credibility move builds on that foundation.

## SECTION 7: CREDIBILITY AND MEASUREMENT

### The Credibility Stack

Credibility with finance is not built in one conversation. It is built in tiers — each one dependent on the tier below it. Marketers cannot skip levels. The stack below maps the five tiers of finance trust, from the data foundation that makes everything else possible to the capital authority that marks full strategic partnership. Most B2B marketers are operating at tier 1 or tier 2. The Vocabulary Gap is what prevents them from moving up: when marketing, sales, and finance define pipeline, attribution, and impact differently, credibility built at one tier cannot transfer to the next.

Tier:	What it looks like:	Key data signal:
<b>Tier 5 Capital Authority</b>	Marketing has input into forecast assumptions and budget allocation. Finance seeks marketing's view before finalizing resource calls.	Only 6 percent of finance leaders say marketing has final authority on forecast assumptions
<b>Tier 4 Planning Influence</b>	Marketing insights regularly change business planning, resource allocation, and forecasting decisions. Finance relies on leading indicators from marketing to shape the forecast.	31 percent of Confident Marketers say marketing insights change planning frequently, vs. 12 percent of less confident; 34 percent of finance say reliable leading indicators tied to revenue quality is their top unmet need
<b>Tier 3 Reporting Clarity</b>	The connection between marketing reporting and business outcomes — revenue quality, margin, retention — is very clear to finance. A non-marketer can follow the numbers to a business result.	32 percent of Confident Marketers vs. 5 percent of less confident say this connection is very clear
<b>Tier 2 Measurement Defensibility</b>	Marketing can demonstrate financial impact in finance's language. Attribution holds under scrutiny. The methodology can be explained, not just reported. Finance can put the number in a forecast.	45 percent of finance agreement on measuring impact; drops to 37 percent for planning reliability and 12 percent under pressure. Top proof types: customer evidence, pipeline quality, retention impact
<b>Tier 1 Data Foundation</b>	Integrated, clean, query-able data across CRM, martech, and analytics. Shared definitions for pipeline, attribution, and impact across marketing, sales, and finance. The prerequisite for everything above.	70 percent of Confident Marketers fully or mostly integrated vs. 35 percent of less confident. Shared definitions is finance's number 1 blocker to trusting marketing

The Credibility Stack is not a maturity model. It is a dependency map. Tier 2 (Measurement Defensibility) without tier 1 (Data Foundation) collapses under scrutiny. Tier 4 (Planning Influence) without tier 3 (Reporting Clarity) never gets the meeting. The marketers who have reached tier 5 in this study describe one consistent path: they did not try to jump. They built each tier deliberately, starting with shared definitions.

## FINAL WORD

For two decades, B2B marketing has argued for its seat at the table. The argument was that brand matters. That pipeline is more than a number. That creative produces commercial outcomes. That long-term investment compounds. The argument was always right. The problem was the argument itself.

In 2026, Confident Marketers stopped arguing. They started translating. They built the data foundation that lets AI produce evidence finance can use. They reframed brand as prepaid demand efficiency — language a CFO already speaks. They retired the metrics marketing owned and sales didn't trust. They armed the champion who has to defend the purchase decision in rooms marketing will never sit in. They stopped reporting on what they spent and started reporting on what each dollar produced.

Confidence rose among marketers over the last year because the work changed.

What remains is the field's honest frontier: the long-horizon value of brand. Every Confident Marketer we interviewed named the same thing as the limit of what they can prove — the inability to show, in a way that satisfies a CFO's balance sheet, what brand investment today will produce five years from now. The leading indicators bridge the quarter. The retrospectives bridge the past. The causal chain from brand investment today to enterprise value tomorrow is the proof no one has yet built. Year three of the study will start there.

For 2026, the lesson is the simplest one in the report. Stop pitching marketing. Start pricing it. The Confident Marketer in 2026 is the one whose CFO already knows what each dollar buys, what each campaign produced, and what the next dollar should fund. The seat at the table is no longer something to argue for.

— The authors, NewtonX and ANA

## ACKNOWLEDGEMENTS

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## ABOUT THE ANA

The Association of National Advertisers (ANA) is the definitive voice of the marketing industry. Since 1910, we have set and advanced the agenda for marketing transformation, connecting over 1,600 member companies to an influential global network, insights, and resources that drive growth. Our members represent 20,000 brands and \$400 billion in annual marketing investment. Through industry-leading research, the CMO Growth Council, and our proprietary Growth Agenda and Practices, the ANA empowers marketers to shape the future of marketing and create lasting impact for their organizations and the industry.

## ABOUT NEWTONX

NewtonX is the only B2B research intelligence platform that delivers AI-speed insights with data you can trace. We help businesses make faster, more defensible decisions, built on verified data across 140+ industries, AI-native automation, and end-to-end research expertise. Trusted by Google, TikTok, Salesforce, Stripe, Microsoft, and Coinbase. Research cited by Gartner, Fortune, Forbes, Adweek, and The Wall Street Journal. Visit [newtonx.com](https://newtonx.com).



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How Marketing's Most Confident Leaders  
Make a Financial Impact

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