

The B2B CMO's Guide to Reimagining Boardroom Impact:

Four Key Drivers of New-Age Marketing Outcomes



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Executive Summary



CMOs are swimming upstream.

Between worrying macroeconomic conditions, dwindling resources, critical talent shortages, and seismic shifts in buyer behaviors—merely incremental changes from marketing fall flat. These factors simply fuel the fire that feeds into the unfair perception of the function being a "cost center," as Forrester puts it in a 2023 report on board perceptions of marketing.1

The writing is on the wall. The B2B CMO role is on the precipice of two possibilities: renaissance or ruin. Yet, on the undercurrent of this disruption is an emerging opportunity to redefine what marketing brings to the table.

It starts with reassessing and refreshing perceptions around the CMO role—and reimagining marketing's entire bedrock as one that supports revenue and growth.

This guide dives into the crux of the CMO's complex role, four key drivers of transformation to realizing new-age marketing impact, and what the new face of the marketing organization must look like to thrive today.

¹ Insight To Guide Your 2024 Marketing Planning, Forrester

On The Outside Looking In: The Complex Nature of the CMO

B2B C-suite executives are increasingly unclear on how to define and measure the role of the marketing organization—and subsequently—what makes a good CMO.







Only 17%

of the C-suite have collaborated with CMOs in an average of 12 months.²



3.1 to 10%

The percentage of CMOs having their growth goals dictated by the CEO has increased by 222%.³



15%

Marketing budgets drop from 91% to 7.7% of overall company revenue.4

55%

of leaders still feel that marketing has an inflated view of its importance in cross-functional initiatives.⁵

As a result of varying perspectives and board-wide misalignment, positions like Fractional CMOs and VPs of Marketing are more widespread, a way for organizations to retain marketing expertise without the need for a full-time, expensive C-suite-level hire.

CMO tenures—although stabilizing at a glacial pace—still lag behind other executive leaders. CMOs themselves are under unique, intense levels of scrutiny to prove marketing ROI all while fighting tooth and nail for the resources to do so.

 $^{^{\}rm 2}\,$ The makings of-a more confident CMO, Deloitte Insight

³ The Growth CMO Report 2024, Chief Marketing Officer Alliance

 $^{^4}$ Gartner CMO Survey Reveals Marketing Budgets Have Dropped to 7.7% of Overall Company Revenue in 2024, Gartner

⁵ CMO Leadership Vision: Top 3 Strategic Priorities for Chief Marketing Officers, Gartner

Part Two

Key Drivers of Transformation: Four Ways CMOs Can Accelerate Profitable Growth



The rules are changing.

From brand-building to being responsible for revenue impact and sales-driven efforts, widespread generative AI implementation, fast-evolving buyer behaviors, data strategy, and more, the CMO role has witnessed one of the most radical transformations compared to other members of the C-suite.

As with any transformation, the transition between what was, what is, and what will be starts with a systemic recalibration of marketing's very purpose in the organization—and what CMOs need to do to get it there.

This guide provides actionable insights on what is needed for CMOs to activate four key drivers of transformation to demonstrate impact and secure their roles, which include:





1

Emerging as a Key Revenue Leader





The Challenge

30% of non-marketing executives⁶—CEOs, CFOs, CIOs, etc.— view marketing's top priority as driving revenue growth.

In that same study, CMOs ranked driving revenue as their third priority. They prioritized creating new products and services, followed by customer acquisition.

The mismatch is evident. "The CMO can struggle to articulate impact when the goalpost is constantly moving, or simply poorly defined," says Jennifer Ross, CMO Fellow and Executive Director of Marketing Strategy at marketing-as-a-service (MaaS) firm 2X.

"In many cases, executives prefer CMOs to arrive at board meetings with a laundry list of metrics—things like MQLs, form submissions, and website traffic. While everyone is aware that these metrics don't directly translate into revenue, there's a tendency to seek immediate, gratifying numbers. This is problematic because though CMOs are under pressure to 'prove their worth,' they're often being guided towards metrics that only track activity rather than genuine business outcomes."

Without making the connection between data points and pipeline acceleration or revenue, these results exist in a vacuum—and justifying the need for more budget and resources becomes harder to do.

⁶ Outside looking in: The CMO struggles to get in sync with the C-suite, SaS



Marketing's job hardly stops when an engaged account is routed to sales. This means continuing with nurtures during the cycle, multi-thread for different personas, and being a contributor in unlocking whitespace as the relationship expands. Your target is revenue; you win when the deal is closed.

- Domenic Colasante CEO at 2X

Three Ways for the CMO to Emerge as a Revenue Leader

For CMOs to emerge as revenue leaders, marketing does not need to be merely cross-functional, they need to be completely unified with sales functions. Three prongs of change management need to happen here.

In her book, The Revenue Ramp⁷, 2X CMO and Al Advisor, Lisa Cole brings up several questions able to prompt marketing leaders to jumpstart greater revenue alignment and redefine marketing's purpose in the revenue-driven organization.





Don't just "fix" the sales-marketing disconnect. Champion the same milestones.

Heidi Melin, Senior Operating Advisor at Hellman and Friedman, and former Adobe Workfront CMO has a way to recognize the most critical symptom of a disconnect.

"Here's how you recognize you have a problem: you, the CMO, presents in a board meeting that all marketing activities exceeded set targets, marketing has had a great quarter-everything's green in that slide."

"Then the sales leader comes up to present—and their slide is all red. The company didn't meet their targets, pipeline, or churn numbers are too high. That's how you know you have a problem."

When sales and marketing rally around shared milestones, the result proves better than simply attending alignment meetings. A common narrative needs to take precedence here, while both leaders make the shift from just "coordinating activities" to fully co-owning outcomes.

Start by asking these questions:



Do marketing and sales share measurement systems?



What are the metrics used to measure performance of marketing programs and tactics?



Is there a continuous feedback loop that requires both to bring information to the table?

⁷ The Revenue RAMP: How to Jump-Start Your Demand Engine to Accelerate Revenue, Lisa Cole





Get acclimated with speaking the same "language".

Both marketing and sales leaders must mutually quantify and communicate the impact each function expects from each other—as opposed to speaking two separate languages in board meetings.

Often, sales teams speak their own language, filled with acronyms like ARR, ACV, CAC, LTV—a language gap that can leave marketing in the dark about the metrics needed to evaluate their own impact.

To bridge this gap, it's essential for sales and marketing teams to establish a common language around key metrics.

Start by asking these questions:



Do all teams lack an understanding of each other's function, process, and skill sets required to be successful?



Is there a formal alignment program with widespread participation across all levels of the organizations in both sales and marketing?



How well does the frontline of marketing collaborate with the frontline of the sales organization?



Are there efforts underway to prevent disputes, such as developing a common language and clarifying roles and responsibilities?





Foster accountability and understanding at every point of this relationship.

The onus is on marketing and sales leaders to cascade a shared understanding of what each action in this relationship returns—everything from its tangibility to business outcome and assurance that it comes from a single source of truth.

Start by asking these questions:



Do marketing and sales share responsibility for the reliability of the revenue pipeline?



What role does marketing performance play in influencing future revenue forecasts?



How many hours does marketing have to pass on leads to sales once the lead has crossed the agreed upon requirement threshold?



In the case of a route-around, how will marketing know who to route the lead to?



What should marketing's response be, if any, to rejected leads? Do those actions vary by rejection reason?

The Challenge

As ABX, intent data, and MarTech capabilities grow in importance and accessibility, CMOs rightfully should have an entire "weaponry" at their disposal to prove the impact of their strategies and secure the necessary resources. Generative Al—a largely marketing-friendly superpower—should also make marketing's claim to success much more achievable by amplifying productivity, personalization, and output.

Yet for all of the many technologies CMOs have invested in, actual data-driven, buyer-first decisions still suffer in the marketing organization.

- Sales and marketing can't agree on relevant content. When asked to name the most effective content types in the buying process, both marketing and sales functions believe them to be case studies and testimonials. Their buyers on the other hand—prefer comprehensive product information and demos.
- Siloes make buyer insights a challenge. 60% of CMOs, Marketing VPs, and other marketing leaders identified Customer Experience Mapping and Personalization as priority initiatives for their organizations9—yet only half actually prioritized sharing these audience insights with other departments that generate content.
- Your buyer's journey remains disconnected from the industry standard. 75% of buyers prefer a rep-free sales experience¹⁰. Yet, those who make digital self-service purchases are 1.65 times more likely to regret a purchase. Sales and marketing still struggle to find the right mix of digital and human interaction to drive more positive buyer interactions.

⁸ Rethink the B2B Buying Process: The Transformed Relationship Between Buyers, Marketers and Salespeople, LinkedIn

⁹ The CMO Coming of Age Story: How Digital Transformation Has Elevated Marketing to a C-suite Growth Driver

 $^{^{\}rm 10}$ B2B Buying: How Top CSOs and CMOs Optimize the Journey, Gartner

Three Buyer-First Approaches for Data-Driven CMOs

Findings from Deloitte reveal a considerable majority of the C-suite believe that Chief Sales Officers (CSOs)—48% of respondents—own the customer experience.

But more and more B2B buyers demand autocracy during the buying process and fewer sales-laden touchpoints. Because of this, it's the CMO that is primed to emerge as the buyer's advocate in the boardroom.

"As marketers, we have the best view of how the buyer's journey moves forward. The technology, the data that we have access to, we need to aggregate it in a way that can support those insights and proactively bring this intel to the business table," says Heidi Melin, former CMO of Adobe Workfront.

Here's three best approaches when it comes to building a buyer-first marketing organization driven by impactful data.



Focus externally first—on markets, customers, and your next buyers

Avoid this:



It's easy for CMOs to get bogged down in internal validation—endlessly defending decisions or getting tangled in company politics. While this seems necessary, overemphasizing internal metrics and approvals diverts attention from the very people who fuel the business: your customers.

You risk losing touch with the market pulse when internal agendas overshadow external realities. This tunnel vision not only limits marketing's impact but also diminishes your ability to show the C-suite how marketing drives growth.

Start this instead:



Shift your focus outward. Immerse yourself in market trends, understand emerging buyer behaviors, and bring these insights back to the boardroom. Take time to actively engage with customers—hearing their challenges firsthand allows you to deliver valuable, data-driven stories that resonate with the business's future.

When you're in front of your peers or the board, wear the customer's hat. Let the voice of the market and buyers shape your narrative. Bring qualitative stories, quantitative trends, and hard data that prove marketing's unique understanding of revenue-driving relationships.

It's this external perspective that sets marketing apart, demonstrating the broader business implications of your strategies.



Align with CEO expectations and external business forces

Avoid this:



Assuming you know what your CEO or fellow C-suite executives expect from marketing can be a critical error.

Too many CMOs fall into the trap of guessing at priorities, delivering insights that may not align with the most pressing business concerns.

Worse yet, some focus only on marketing-specific metrics, not understanding that what matters to the CEO or CFO is often far beyond campaign performance or brand perception. This misalignment limits the strategic value you bring to the table.

Start this instead:



Actively seek to understand what keeps your CEO up at night—whether it's new market entrants, economic shifts, or shifting customer demands. Speak with your peers, find out what their pressures are, and pinpoint where marketing can offer valuable intelligence.

By becoming a conduit for external insights—industry shifts, competitive dynamics, or new market opportunities—you earn a seat at the strategic table.

Don't just present marketing wins; connect the dots between customer insights and broader business opportunities or risks. Once marketing is seen as an ally in navigating external business forces, your C-suite will naturally turn to you for guidance on growth.

3

Analyze the buyer's journey to improve revenue conversations

Avoid this:



CMOs may find themselves celebrating the close of a big deal without diving deeper into how the sale unfolded across touchpoints.

This lack of post-mortem analysis leaves a crucial gap in understanding how marketing, sales, and customer experience truly collaborate to drive revenue.

Focusing purely on the end result—winning the deal—can cause the team to overlook critical insights into buyer behaviors and internal efficiencies that are key to sustainable growth.

Start this instead:



Start analyzing the buyer's journey with the same rigor as you would analyze campaign performance.

Every deal tells a story—not just of success but of the processes that led to it. Conduct a full diagnostic of the buyer's experience, identifying which interactions were pivotal and where cross-functional collaboration thrived or fell short.

By sharing these diagnostics in the boardroom, you refocus conversations on what matters: the buyer and how marketing fuels revenue. The more you bring granular insights on what really worked across departments, the more your peers will see marketing as instrumental in driving business success.



The Challenge

51% of marketers¹¹ state that MarTech optimization and management is abandoned when new initiatives or projects come up.

MarTech solutions do not benefit from a 'plug and play' approach. Full-stack integration with other tools and platforms, day-to-day monitoring, and ongoing training on all new features and updates are the only ways to keep tech stacks aligned with organizational growth and larger strategies.

But if the team lacks the skills or resources to leverage the new tool fully, the expected ROI never materializes. The marketing team continues to operate without new data-driven strategies, effectively rendering the MarTech investment futile.

Wasted MarTech creates a huge credibility crisis for CMOs. If MarTech investments fail to deliver because they are underutilized, stakeholders begin to question the CMO's ability to make the investments altogether; and annual marketing budgets take the hit.

¹¹ The State of MarTech: G2 Data Reveals Latest MarTech Trends, G2

Three Ways CMOs Can Articulate Significant MarTech ROI

Maximum MarTech ROI starts with an exhaustive assessment of each solution in your stack and how it's rightfully supposed to contribute to greater marketing impact. Here's a more nuanced approach to achieving that:



Be purposeful with MarTech impact articulation

Shift the attention to quantifying and communicating the impact that MarTech reorganization brings. There is a need here to be clearer at why each decision made about the MarTech stack contributes to greater, bottom-line impact.

These more "intangible levers" and their correlating story could include how:

- "...these standardized and scalable processes ramped up marketing performance, with success measured by fewer review touchpoints and faster outputs per quarter."
- "...this solution gave facilitated with higher quality leads as a result of greater prospect insight, hyper-personalized content generation, etc."
- "...this teamwide tech enablement strategy supported a holistic overview of the buyers journey—and now we know where they are most likely to drop off so we can start fixing that."



Implement a "MarTech Sandbox" approach

Here, CMOs or marketing leaders can develop a controlled environment where new tools and methodologies can be tested without impacting live operations. This could involve setting up separate instances of your MarTech platforms or using simulation tools.

It's akin to having a dedicated space where new ideas can be safely explored and validated—by MOps teams, data science analysts, and content functions—ensuring that only the most effective innovations are adopted before full-scale deployment.



Outsource MarTech utilization

After working with more than 100 of the largest B2B organizations in the world, we realized that the biggest roadblock to full MarTech ROI isn't actually choosing the wrong platform: its capacity. Most organizations rely on generalists to pull both levers of campaign activation—campaign strategy as well as platform setup, reporting, and optimization.

It's hardly feasible, or at least, without one lever suffering from lesser focus. What CMOs truly need is an approach that divides MarTech strategy from day-to-day utilization and optimization.

A dedicated MarTech implementation vendor employes B2B professionals certified on each specific platform in your stack, then stays on top of all new updates, features, and best practices—ensuring that your marketing efforts are always deployed according to industry standards.

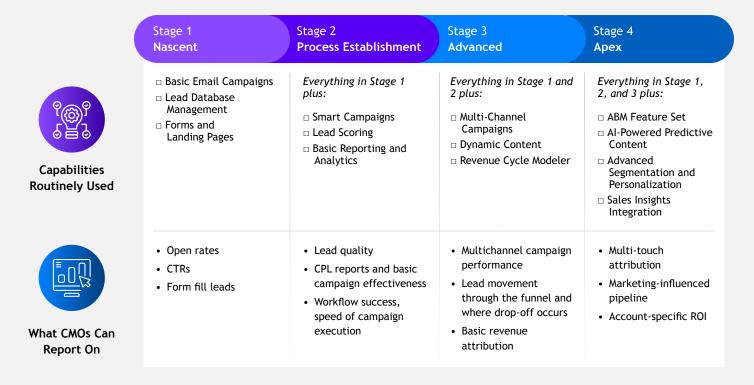
Meanwhile, your in-house team can remain focused on the brand's broader goals without getting bogged down by the technical learning curve.

A Quick Guide on Evaluating MarTech Maturity

At 2X, we start out with maximizing your tech stack's ROI with a maturity model framework meant to evaluate the utilization of your solution—and how close it is to actually being used the way it's supposed to.

Here is what this maturity framework might look like for Adobe Marketo Engage, a powerful marketing automation platform that stands to give marketers an encompassing view of buyer journeys.

Sample Framework for Evaluating Adobe Marketo Engage's Potential



At Nascent and Process Establishment stages: Marketing leaders are only able to report on what could be considered as surface-level metrics. It's better than nothing, but still, falls short when it comes to justifying large investments such as Marketo. When renewal approaches or budget discussions arise; it's not surprising that CFOs might wonder why marketing "can't just get a similar, cheaper platform that does the exact same thing?"

At Advanced and Apex stages: Marketo finally steps into its full potential. It's able to paint a comprehensive picture of everything from marketing-influenced pipeline to deep buyer insights and behavior.

If every solution in a tech stack is able to introduce the value at Stages 3 and 4; CMOs are on their way to emerging as the gold standard for how a C-suite leader is supposed to implement, optimize, and treat tech stacks in general—positioning them to truly be a digital transformation leader in the organization.



The Challenge

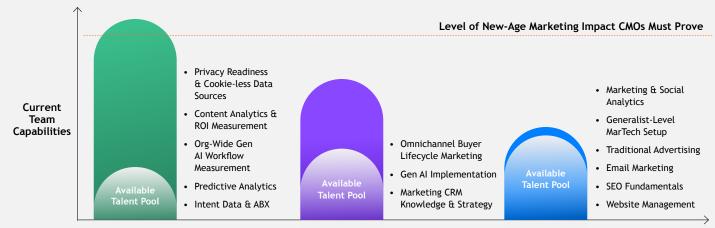
The credibility of a CMO is intrinsically tied to the adaptability and sophistication of their team, reflecting the broader health and future readiness of the entire marketing function.

With the onus on marketing to demonstrate impact on revenue and growth, many B2B CMOs will begin to notice a growing mismatch of current capabilities and expected results.

The B2B marketing's "talent shortage" often discussed among leaders is a sweeping generalization of the actual issue. While B2B marketers may not be in short supply, those with competencies to navigate the demands of new-age B2B marketing are.

Traditional competencies that supported the older identity of the marketing organization—everything from traditional advertising to standard email outreach—are not the end all be all to what a marketer needs to produce results today. Those competencies have greatly evolved, and now serve the purpose of being merely "fundamentals" instead of well-rounded capabilities.

Marketing teams with a majority of traditional-stage competencies are still able to keep the engine going but are at risk of being categorized as the "order-taker" to sales functions. The lack of new-age competencies keeps CMOs largely stifled, unable to carry out widespread ABX initiatives, for example, without having their teams undergo significant upskilling.



11 Marketing Team Requirements Needed for New-Age Growth



The reality is that CMOs are expected to build teams versed on both traditional and new-age competencies—the latter of which include knowledge of intent data strategies, ABX, and generative AI best practices—to pave the way for what CMOs are expected to prove.

Here is what the next generation of the marketing function looks like, and the requirements to support it.



DIGITALLY LED

Proficient across digital strategies, orchestrates omnichannel experiences, relies on analytics to guide efforts.



AI-FORWARD

A daily AI user, proficient in multiple AI tools, integrates tools into workflows for day-to-day collaboration.



LIFELONG THOUGHT LEADER

Committed to daily learning, actively builds their personal brand through various channels on behalf of the organization.



OUTCOME AND REVENUE FOCUSED

Understands the nuances of driving pipeline and revenue impact by orchestrating integrated marketing strategies, leveraging attribution models, etc.



AGILE & ADAPTABLE

Experienced in post-product-market-fit environment and embraces agile methodologies.



INNOVATIVE PROBLEM SOLVER

Combines critical thinking with creativity, crafting innovative marketing strategies and embracing experimentation to solve complex problems and learn from failures.



EXCEPTIONAL COLLABORATOR

Ability to clearly communicate ideas, manage virtual teams and partners effectively, and navigate cross-cultural dynamics in global operations.



DATA-RESPONSIBLE MARKETER

Balances innovation with ethical AI, data privacy, and customer experience while ensuring responsible AI practices in marketing strategies.



FLEXIBLE TEAM PLAYER

Leads with agility and influence, valuing outsourcing and flexible resourcing over building rigid, hierarchical organizations.



TALENT DEVELOPER

Excels in developing talent and adapting coaching, whether for team members or AI models, regardless of the reporting structure.



CUSTOMER-OBSESSED

Prioritizes customer experience by anticipating needs, leveraging data for personalization, and aligning marketing strategies with the entire customer journey.

Part Three

Rebooting CMO & Marketing Impact with a New Operating Model



At its core, the role of the CMO—and marketing in itself—has radically changed.

It's a transformation compounded by growing rifts between what executives expect from marketing, what CMOs believe they are responsible for, and resources actually given to CMOs and marketing leaders to actualize tangible, relevant impact.

Jennifer Ross, 2X's CMO Fellow and Executive Director of Marketing Strategy, has over three decades of experience in marketing organizational design—and she shares three crucial reasons why CMOs need to consider transforming marketing operating models.

Three Reasons CMOs Need to Transform Marketing Operating Models

1

All incremental changes to processes, teams, or MarTech are falling flat.

Too often, CMOs fall into the trap of fine-tuning their teams and processes without a clear focus on the endgame.

The end goal should be, "Are we achieving our desired outcomes?" In a world where B2B buyers are increasingly sophisticated, marketing must go beyond superficial engagement.

The goal is to create a model that not only captivates prospects but also converts them into loyal customers. This requires a strategic shift from team-centric to outcome-oriented thinking, where every action is designed to drive scalable, repeatable success.

2

Your marketing budgets don't make sense when it comes to what the board is expecting.

In an era of tightening budgets, CMOs are under immense pressure to justify every dollar spent.

The knee-jerk reaction might be to cut back on initiatives, but the true thought leader asks, "How can we achieve more with less?"

This is where alternative resourcing models, like MaaS, come into play. By shedding the outdated stigma around outsourcing, CMOs can unlock new efficiencies and stretch their budgets further, all while maintaining, or even enhancing, their ability to drive growth. The key is to view these models not as compromises, but as enablers of smarter, more agile marketing.

3

Innovation and experimentation remain a rhetoric—but with little to no action.

It's easy to talk about the importance of innovation, but the real challenge lies in creating an environment where it can thrive.

CMOs must go beyond lip service and actively foster a culture of experimentation. Consider Al—many marketing leaders recognize its potential but struggle to find the bandwidth to explore it fully.

By leveraging models like MaaS, CMOs can offload routine tasks, freeing up their teams to innovate and experiment. This approach not only meets CEO expectations but also redefines the CMO's role as a catalyst for growth and innovation, bridging the gap between strategic vision and operational reality.

The Subscription Model Advantage: How CMOs Can Drive Impact Without Adding Headcount



CMOs have ambitious goals to hit, and the board expects results. But let's face it: traditional marketing models weren't built for today's business climate.

You need flexibility, speed, and the ability to scale, all while keeping costs in check. Whether you're a CMO in a high-growth tech company or overseeing marketing in a global enterprise, you're constantly challenged to do more with less.

But increasing headcount isn't an option; neither is falling short of your growth targets. So, how do you break through these constraints?

2X, the world's leading B2B marketing-as-a-service (MaaS) firm, has helped B2B companies bridge the talent gap, realize the full power of their MarTech stack, and ultimately, drive revenue.

Here's how CMOs can prove intentional, clear marketing growth and effectiveness with MaaS:



MaaS deploys one-time transformation.

One of the most pivotal decisions a CMO faces is whether to implement a sweeping, one-time change or to roll out incremental adjustments over time. The allure of gradual shifts is understandable—it's less daunting and seems to allow for course corrections along the way.

However, this strategy often leads to marketing leaders spending an inordinate amount of time in a state of perpetual transition. Incremental changes, while less disruptive, can create a scenario where the marketing function is continuously adapting without ever fully arriving at a new, optimized state.

By orchestrating a one-time, well-executed overhaul, MaaS partners are integrated seamlessly into the new operating model from the outset. This avoids the pitfalls of piecemeal changes, where confusion and misalignment can creep in, diluting the impact and creating unnecessary disruption.



It's clear change management that puts marketing in parallel with larger organization goals.

Unlike traditional outsourcing models, where vendors are merely executors of tasks, MaaS partners often bring a strategic perspective that can help shape the overarching marketing transformation agenda.

By collaborating on this vision from the outset, CMOs ensure that the marketing changes driven by the MaaS partners are not just tactical improvements but are intrinsically linked to the organization's long-term strategic objectives.

This co-creation process fosters a shared sense of ownership and accountability, making the MaaS partnership a powerful vehicle for organizational alignment.

3

It streamlines the buy-in process from internal teams.

One of the profound benefits of the MaaS model is its ability to reframe the roles of retained team members, steering them away from rote execution tasks and back towards their core competency—strategic marketing.

MaaS opens doors to broader responsibilities and skill enhancement. By managing vendor relationships and execution resources, internal teams gain exposure to new facets of marketing operations, fostering professional growth and expanding their capabilities. This alignment between strategic intent and operational capability is where true value is realized, driving both organizational success and individual fulfillment.



About 2X

Founded in 2017 by three B2B CMOs, 2X is a global marketing-as-a-service (MaaS) firm that powers growth for B2B companies through optimized resources delivering strategy, AI powered content, campaigns, operations and analytics.

Rather than expanding your internal team, 2X offers a managed service model that operates like a subscription—scalable, flexible, and cost-effective.

2X is an official partner of 6sense, Adobe, Hubspot, Drift, WP Engine, Google, Salesforce, and more, and has been recognized multiple times by Inc. as one of the fastest growing organizations in the US.

Our Success Stories

FARO

A 46% reduction in marketing spend after shifting 50% of its marketing organization to 2X, and yet, a 93% increase in marketing-sourced revenue; from \$59.4 million to \$114.86 million

SANDL=R°

A 30% increase in marketing-influenced pipeline in six months and a 300% boost in web engagement.



A \$1:\$112 ROI on total program investment to pipeline value, a 60% reduction in cost per engaged account, and the ability to engage 2.5x more accounts on a flat marketing spend.

