



From complexity to clarity to connection

A playbook for technical
B2B marketing

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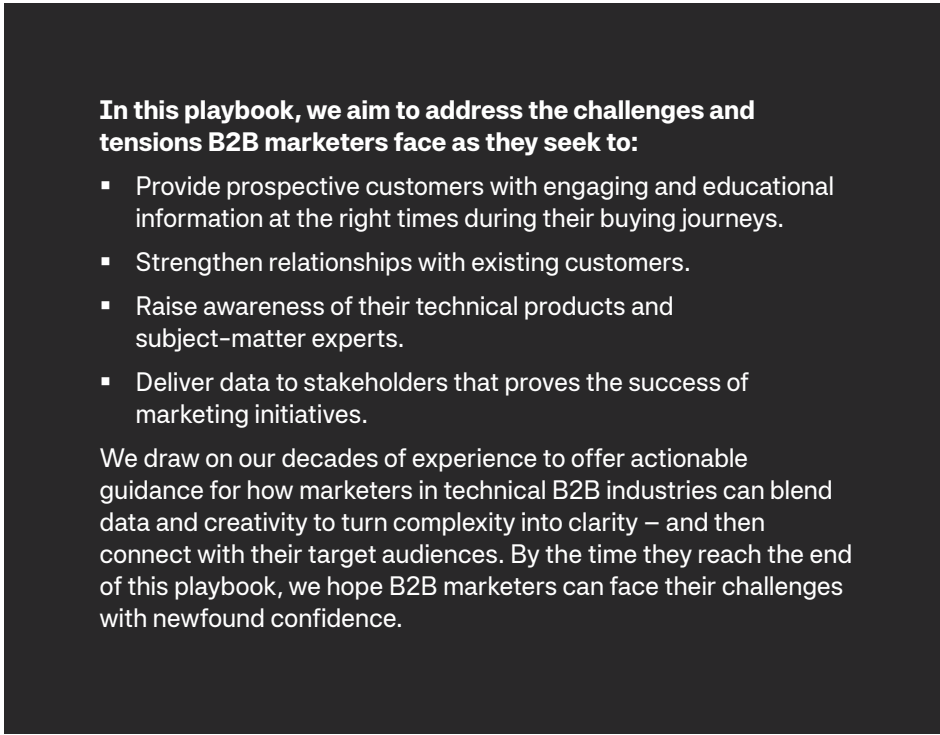
A uniquely challenging environment

Marketing leaders in technical industries operate in a pressure cooker.

The C-suite needs a meaningful return on its marketing investments. Product managers, technical experts and salespeople have their own product-specific priorities and goals. Marketing leaders must balance their pleas for support with known business goals and budget constraints. And then there is the most important audience of all: customers and prospects. They look to the brand to deliver the information they need in a timely and unobtrusive manner. They balk at hard sales and increasingly do their own research all the way up to the point when they are ready to buy. As a result, brands must be visible across a wider range of channels and platforms than ever before.

What is a marketing leader in a technical B2B industry to do?

We at The Agency at Sikich have worked with marketing leaders at a wide range of companies – from manufacturers to professional services firms – serving technical and mission-critical industries. We understand the need to gain a comprehensive understanding of technical topics, find ways to turn that often arcane material into compelling and diverse content, and disseminate that material across channels to engage, inspire, and ultimately sell to key audiences. We also understand the balance marketers must strike between creativity and cold, hard data. Measurement is essential, and company leaders deserve to know if their investments are paying off. But creatively stunted marketing will fail to meet the expectations of customers and prospects and limit a B2B brand's reach.



In this playbook, we aim to address the challenges and tensions B2B marketers face as they seek to:

- Provide prospective customers with engaging and educational information at the right times during their buying journeys.
- Strengthen relationships with existing customers.
- Raise awareness of their technical products and subject-matter experts.
- Deliver data to stakeholders that proves the success of marketing initiatives.

We draw on our decades of experience to offer actionable guidance for how marketers in technical B2B industries can blend data and creativity to turn complexity into clarity – and then connect with their target audiences. By the time they reach the end of this playbook, we hope B2B marketers can face their challenges with newfound confidence.

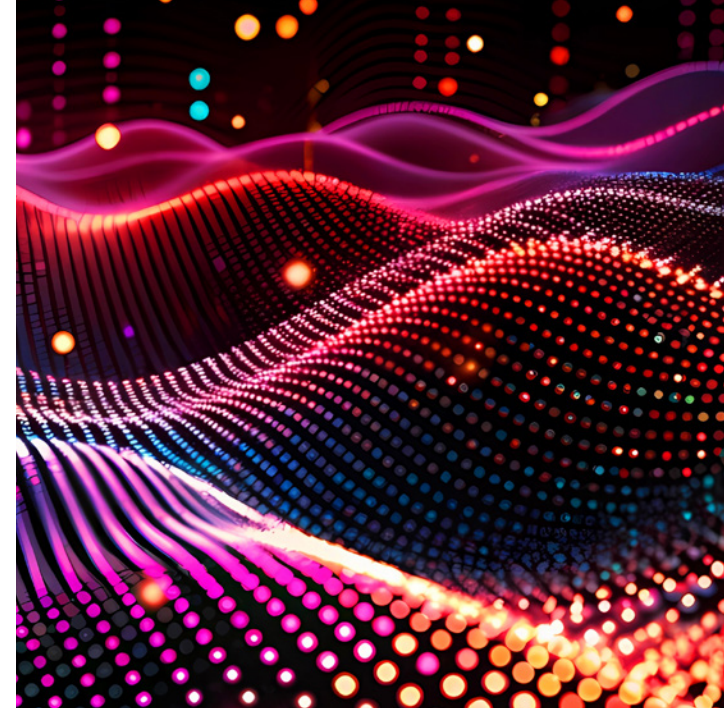
A conflict or a false choice? Data vs. creativity

Picture a marketing leader walking into a quarterly review. The CEO leans forward and asks: “We love the trade show leads, but where’s the proof this brand campaign is moving revenue?” The marketer has dashboards full of metrics — impressions, clicks, traffic — but none directly answer the question. Meanwhile, her engineers are pushing for more data sheets, and her sales team wants a new webinar series. It’s a composite scene, but one that plays out every day in technical industries: marketers caught between data-hungry executives, commercial teams demanding support for products that are innovative yet hard to explain, and customers who want clear, engaging information on their own terms.

The emphasis on data is not unfounded. According to a [Harvard Business Review study](#), 77% of data-driven companies reported revenue growth compared to 61% of peers who were not data “leaders.” But for marketers in technical industries, the risk is leaning so heavily on dashboards that creativity — the force that actually fuels engagement and brand differentiation — is sidelined.

An apparent conflict sits at the heart of this mix of audiences and priorities: **data vs. creativity**. Internal stakeholders are enamored with data and want to see proof that each marketing initiative is driving revenue growth (or progress against a priority key performance indicator). Seasoned marketers know marketing is a blend of art and science, a balance between crafting inspiring and engaging material but also ensuring that content resonates with target audiences in measurable ways. And they know that the time between activation and measurable results is not always predictable — and can be too long for demanding stakeholders.

We believe data vs. creativity is a false conflict. Instead, B2B marketing desperately needs an infusion of creativity to fuel performance on the metrics that matter. This creative performance marketing can not only help brands better engage with key external audiences but also drive results that get the attention of internal stakeholders. Executing on this vision requires a comprehensive rethinking of marketing strategy that starts with an understanding of the complex challenges B2B marketers face today.



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B2B marketing and the pressure for more

Marketing leaders face unrelenting pressure to deliver “more” from all stakeholders.

- **Customers** want more content across formats and channels (from digital platforms like YouTube to distributor websites). They want educational and technical content at their fingertips. They seek a mix of snackable content they can consume on the go and deep technical content that anticipates their most probing questions. And they want control over how they consume information. According to [McKinsey](#), B2B buyers use an average of 10 channels in their buying journey.
 - **Product-focused stakeholders** (e.g., product managers, technical experts, salespeople) want more support for their products and market activations (e.g., trade shows, channel partnerships). Technical experts seek to deliver the proof points their customers need. They don't want the brand to water down technical information within content, fearing they will lose credibility with technical buyers.
 - **The C-suite** wants accelerating growth and proof of a strong return on their marketing investments. The tenor of board meetings depends on the players involved and their belief in marketing and its effectiveness. But even the most marketing-friendly members of the C-suite need evidence of success to continue to support current marketing leaders and expand budgets.
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In the face of these competing pressures, some marketing leaders turn inward. But inward-facing marketing is reactive marketing. Marketers in this posture often adopt either a C-suite-driven quick-win strategy or a tactic-first strategy driven by demands from product managers, salespeople, and technical experts.

This outcome is unfortunately common in technical companies that have extensive product lines and a multitude of target industries and audiences. With so many priorities to address, it's easy for strategic focus to become dispersed, leaving marketing to respond to demands across the organization.

Both approaches put marketers in a reactive mode and diminish the impact of their efforts.



The quick-win strategy

When a marketer says they are pursuing “quick wins,” it can sound aggressive and results-focused. However, a quick-win strategy often results in undue focus on short-term vanity metrics. These metrics (e.g., impressions, clicks, website traffic) may look good on slides and dashboards but don’t necessarily point to deep customer and prospect engagement with the brand.

A quick-win approach can also harm creativity. Teams in this reactive posture often go against their best creative instincts and publish overly promotional content in a desperate attempt to generate leads. The problem is that if the marketing team has not laid the groundwork for lead generation by sharing valuable and educational material and establishing credibility and trust with their audiences, promotional campaigns will often fall flat.

Marketing teams with this quick-win mindset operate from stakeholder meeting to stakeholder meeting. Over time, their efforts become almost entirely focused on short-term metrics. They may notch a few wins and keep the heat off for a time, but this short-term focus eventually waters down the quality of the marketing material the brand produces. Without a foundation of content excellence that helps a company build a strong and solid reputation, it will find itself caught in the middle, amid the morass of mediocre marketing content flooding digital channels. The brand no longer stands out in a fiercely competitive media environment, and customers start looking elsewhere.



The tactic-first strategy

Usually adopted in response to demands from product managers, technical experts and salespeople for content they need now for customer meetings or trade shows, a tactic-first marketing strategy puts more emphasis on outputs than results. Questions like these drive a tactic-first marketing strategy:

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- Did we deliver that new banner for the tradeshow?
 - Does this salesperson have the latest brochure for his meeting with the customer?
 - Does our datasheet have the latest test data?
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While the materials produced by a tactic-focused team are often quite valuable and can contribute to meaningful results for the company, they should be supporting players in a larger strategic effort. If these tactical activities become the focus of the marketing effort, the team will lose sight of the core business goals and become order-takers who do little more than push out marketing materials with limited reach. They will be in no position to connect with new audiences.



The Reactive Marketing Trap

| | What it looks like | Why it hurts |
|-------------------------------|---|---|
| Quick-win marketing | Chasing vanity metrics (impressions, clicks, traffic) to appease executives. | Produces short-lived spikes, weakens creative courage, and erodes brand strength. |
| Tactic-first marketing | Responding to every request from product managers or sales teams (datasheets, trade show banners, brochures). | Turns marketing into an order-taking function, leaving no room for strategic storytelling or market-building. |

The proliferation of AI tools can present an additional risk to teams stuck executing reactive marketing strategies. As marketing teams work to quickly launch campaigns tied to the latest KPI, or update content at the request of sales teams, AI makes it easier to quickly produce and publish materials. However, outsourcing marketing execution to AI without sufficient expert oversight can diminish quality and fidelity to brand identity. Eventually, this degradation in quality and consistency can sever trust with customers.

The creativity crisis in B2B marketing

This over-rotation to data has costs. More than 70% of respondents in an [Oracle survey](#) said that large data volumes hindered decision making. And some have [cited](#) a decline in creative skills in the advertising industry as companies prioritize technology and data.

A creativity crisis is the result of this reactive approach to marketing. Marketing output becomes dry, staid, highly technical and often boring. How often have you seen B2B ads that feature decades-old photography, uninspired color treatments and generic designs? How often have you read B2B content that is overly long, jargon-rich and lacking in imagination?

Reactive marketing strategies result in not only uninspired content but also increase the chances that the brand will be absent from many of the platforms where prospective buyers spend time, collect information and move toward purchase decisions. After all, when a marketing team needs to deliver “quick wins,” they will stick to the platforms they know instead of experimenting with new ones. When a team needs to deliver assets to product managers, they won’t test new paid strategies that expand the brand’s reach beyond existing customers.

To reach and connect with new audiences, brands need to:

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- 1 Spark their interest
 - 2 Show value
 - 3 Nurture initial engagement
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Meeting the needs of these audiences requires B2B marketers to shift their perspective from inward to outward.



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Put the customer in the spotlight

An internal-focused marketing strategy takes customers and prospects out of the spotlight. But it's time for B2B marketers to refocus their efforts on their external stakeholders. After all, the stakes are high.

The sales funnel is non-linear. According to the [2025 State of Marketing to Engineers report](#) from GlobalSpec and Trew Marketing, 72% of technical buyers spend at least half of the buying process online before speaking with someone at a company. As a result, brands have less control over their relationships with customers and prospects. Buyers engage with brands on their own terms and collect large amounts of information across channels and platforms before even considering engaging with a sales team. This increased buyer power, combined with the proliferation of marketing platforms, means that B2B brands must show up in more places. With more compelling content. More frequently.

And there's little room for error. Given that [McKinsey](#) has found that buyers are likely to look for alternatives if they don't have a "smooth experience" across channels, brands that fail to educate early and meaningfully risk being filtered out before the first conversation. Unfortunately, many brands are not delivering what prospective buyers seek. According to [DemandGen Report](#), half of B2B buyers say most of the content they encounter feels too generic to be useful.

B2B marketers need to ensure their brands stand out as innovators and hotbeds of compelling content in an oversaturated media environment, building trust with their key audiences, fostering engagement, and ultimately supporting business growth.

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Here's what this shift looks like:

Inward-facing marketing

Boardroom-pleasing: Chasing metrics to survive the next review.

Order-taking: Producing datasheets and banners on demand.

Short-termism: Prioritizing clicks and impressions.

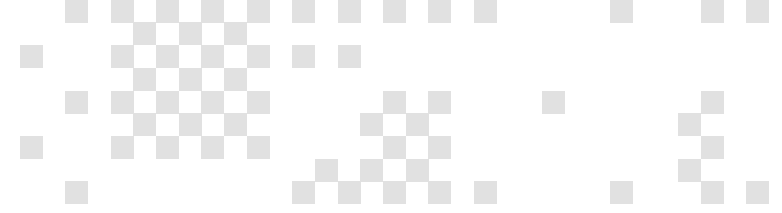


Outward-facing marketing

Customer value focus: Educating buyers and proving impact with KPIs that indicate meaningful engagement.

Visibility across platforms: Ensuring the brand shows up where buyers seek information.

Long-term connection: Building trust, loyalty, and brand differentiation.



The three C's of technical B2B marketing

The good news is that creative marketing that inspires audiences can produce the results internal stakeholders are after. Executing on a more creative B2B marketing strategy requires boldness and confidence from marketing leaders, a structured game plan with mileposts, and projections to reassure data-focused stakeholders.

We have several recommendations for how B2B marketers can overcome the challenges they face and produce marketing campaigns that broaden their companies' reach with prospective buyers. This shift starts by focusing on what we call "the three C's." It's an operating model for action that puts the customer front and center.



Content

Compelling content sits at the heart of B2B marketing. A brand's content should take different forms (interactive landing pages, case studies, videos, infographics, social media carousels, etc.). But all of it must boil down the complexity of a B2B brand's products and solutions into interesting, yet still sophisticated, material that will engage key audiences. After all, technical buyers are seeking education. According to AspenCore's [Mind of the Engineer](#) report, over 80% of engineers dedicate significant time to learning new technologies and design techniques. Brands can meet their need for education through their marketing output.

A key to content success in technical industries is adopting an "editorial mindset." Instead of thinking brand-first and publishing overtly promotional content, marketers should think audience-first and treat content strategy like a publication. With this approach, content marketers turn into editors who identify the most compelling angles for content, the most relevant formats for different pieces, and the strategies they can use to get that content in front of relevant audiences. Here are some examples of how an editorial mindset can enhance marketing output:

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- **From static to interactive:** Instead of creating a 10-page brochure about a product suite, develop an online product tool that allows users to explore relevant products and share notes and questions with the sales team.
 - **Content expansion:** Publish a LinkedIn article by an engineer, and follow it up with a 2-3-minute video featuring the engineer discussing key takeaways from the piece.
 - **Extended engagement:** Supplement a product launch's news release with an engaging website landing page, animated video and a Reddit AMA to foster audience engagement.
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B2B marketers should aim to maximize the benefit of their rich content pieces. For example, one long-form anchor piece (a digital white paper, for example) can serve as the jumping-off point for short-form videos, infographics, blog posts, media articles and social media content.

Download our Content Repurposing Checklist to maximize the impact of your rich content pieces.

The goal is to produce interesting material for the marketplace in order to raise brand awareness, increase engagement and build long-term trust. Adopting this journalistic approach to content strategy can help a brand unlock its creative potential and turn technical material into compelling, must-have content.

Bringing technical material to life

A global manufacturer sought to promote its wide range of solutions for artificial intelligence applications to customers and prospects. It had troves of technical material and proof points, but it needed a find a way to bring the information to life and show in a comprehensive yet digestible manner the array of solutions it offers.

The Agency at Sikich worked with the company's marketing team to develop a digital content hub. The anchor piece of the page was an interactive 3D model of an AI board and a video "tour" of the board that detailed the company's solutions for the various components on the board. Visitors could explore the board, clicking on different areas to watch relevant snippets of the video, read a summary of the solution set, and click through to more technical information.

The end result was an engaging showcase for the company's unique and comprehensive solutions for AI.



Channels

We have discussed how technical buyers do much of their research on their own before engaging with a vendor. We also know they are active across a wide range of channels. For example, according to the Mind of the Engineer Report, social networking sites are engineers' most frequently used information sources. Further, the State of Marketing to Engineers report found that 70% of technical buyers frequently watch work-related content on YouTube. And the same report found that 61% of engineers cite "technical publication articles" as valuable when researching for a significant purchase at work.

B2B brands must embrace this buyer-driven sales journey that spans channels and platforms – and expand their marketing presence. They must find ways to show up with an impactful presence in more places. Succeeding across channels and platforms requires different strategies and tactics. But building a strong presence in the various places where prospective buyers engage will help the brand gain consideration and engagement over time.

However, marketers must be careful not to spread the brand too thin. If a brand can't maintain a robust presence on a particular platform due to budget or resource constraints, skip it. Brands should go all-in on the platforms where they play. If they don't, they'll likely do more harm than good.

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Connection

The ultimate goal of B2B marketing is connection. It's sometimes easy for marketers to lose sight of this reality when they are editing technical datasheets and incorporating CAD drawings into brochures. However, like the rest of us, B2B customers respond to effective brand engagements. So, even within the confines of their professional brands, they can find ways to connect with and inspire their customers. This quest for connection will look different for every brand, but all must keep it at the center of their marketing efforts. With a sound content and channel strategy, marketers position their brands to connect meaningfully with their customers and prospects.

And once you make connections, don't let them wither. A B2B marketing strategy should not only seek initial engagement but ongoing relationships, fostered by a steady delivery of educational and valuable content across channels and platforms. For example, if a lead filled out a form on LinkedIn, target (at an appropriate cadence) that individual with supplemental content on LinkedIn. Mix in promotion of the company's email newsletter and/or webinar series to encourage sign-ups, which can facilitate deeper engagement with the brand.

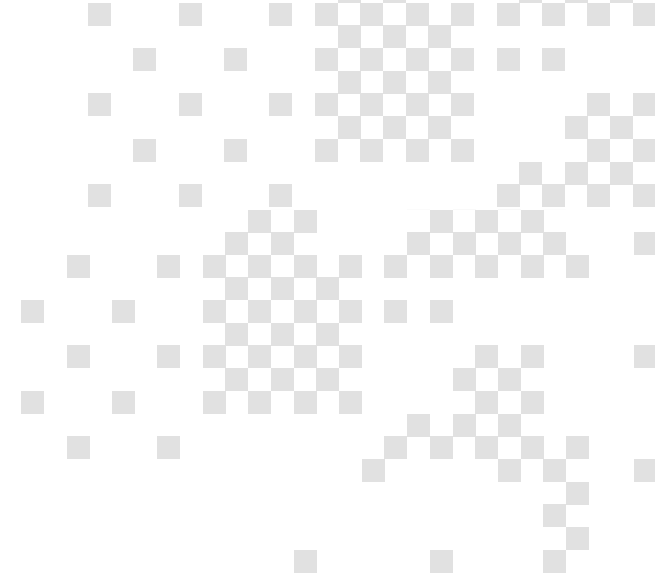
By embracing editorial-driven content and channel optimization in their marketing efforts, B2B marketers can build connections that help their brands strengthen their positions in competitive markets.

Connecting marketing and sales

A common mistake in B2B marketing is not closing the loop with the sales team. Marketers see their job as generating interest in the brand and its products and, in the best-case scenario, securing contact information from interested prospects. Ensuring those marketing qualified leads continue to make their way smoothly through the sales process involves internal coordination (e.g., making sure leads gathered from social media end up in the CRM system) as well as technical mechanics (e.g., properly setting up email marketing automations for lead nurture).

Marketers who are spearheading campaigns should view it as their jobs to ensure they equip the sales team to engage prospects and close deals. At the outset of their campaigns, marketers should align with the sales team on processes, roles, key messages, relevant collateral, and handoff points for data and information.

With close collaboration between marketing and sales, companies can ensure they usher prospects through the sales funnel effectively.



Recraft the stakeholder story

While B2B marketers should embrace creative tactics and strategies and address the needs of customers and prospects first and foremost, they still need to meet the needs of their various internal stakeholders. Marketers need to position their creative campaign ideas as avenues through which to bring the company's priority products and initiatives to life and connect with their target buyers. While these efforts may lead to results tomorrow, in other cases they plant seeds that bear fruit years down the road. Marketers can't shy away from this nuanced story. Here are four tips for how to recraft the story to internal stakeholders and make the case for a creative marketing effort in technical B2B industries:

- 1 Cut back on KPIs:** It's tempting to flood the zone with data. But it's usually better to focus on a small, priority set of KPIs. In most cases, marketers should build a balanced mix that includes top-of-funnel metrics like landing page traffic, conversion metrics like form fills, and metrics that signal deeper engagement. For example, tracking how long prospects spend with technical resources helps you understand whether they're truly digesting complex information. Explain clearly to stakeholders why each KPI matters and how it points to ultimate business success.
- 2 Embrace accountability:** Once the marketing team has defined priority KPIs, it's important to set realistic goals for each of those KPIs. Additionally, identify mileposts that will help the team determine when to pull the plug on an unsuccessful campaign or pivot to an alternative strategy. By embracing this accountability, the marketing team demonstrates a sense of urgency and shows that they are not asking for indefinite trust.
- 3 Be transparent:** Marketers must be open about what's working and what's not with stakeholders. At no point should marketers seek to obfuscate or paint an overly rosy picture. By being transparent, marketers can build trust with their internal stakeholders and foster collaboration.
- 4 Have a bias for action:** Marketers should adopt an action-oriented posture when reporting to stakeholders. Explanations are necessary, but it's crucial that marketers cap off their reporting with clear go-forward actions. Is a campaign underperforming? Explain how you plan to shift budget or why you recommend staying the course. Proactively offering solutions and next-best actions will help marketers build credibility with their stakeholders.

By taking control of the story, marketers will build internal trust and position themselves to operate more autonomously, which opens up opportunities for more creativity and impact.



Feast on the technology bounty

In an era when budgets are tight and teams are lean, how can marketers respond successfully to the demands placed on them and get all this work done?

We live in an era of technological bounty, where creatives can vibe-code apps, coders can write polished long-form content, English majors can prepare data-rich dashboards, and math majors can create beautiful graphics. The ease of use of tech tools today enables nearly every member of marketing teams to do more. AI is the enabler and accelerator of much of this democratization of technology, though there are times when marketers need to leverage other professionals (e.g., web developers, data and analytics professionals, etc.) to fully leverage tech tools.

No matter how they execute, marketing teams must embrace the plethora of technology available to them to respond to the velocity of the marketplace, boost their operational efficiency, and improve the quality and richness of their outputs. We see two big opportunities to embed robust technology in B2B marketing:

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- 1 Data storytelling:** By developing a robust data infrastructure, a B2B marketer builds credibility within the organization. A marketer who comes to the C-suite with a thorough and consumable dashboard, clearly defined KPIs, and transparency around what's working, what's not — and what needs attention now vs. what the team wishes to continue to watch — will increase their odds of having a "hands-off" C-suite. Use AI-enabled tools to speed data analysis and dashboard development and ensure real-time visibility into campaign performance. Then, leverage your marketing and communications chops to ensure that data visualization tells a compelling story for internal stakeholders.
 - 2 Content development:** AI tools can speed execution of marketing programs. General-use LLMs like Claude and ChatGPT can help teams ideate and generate compelling, on-brand copy. Tools like Descript can facilitate efficient video editing and production. Platforms like Conductor can support robust search engine optimization programs.
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B2B marketers should aggressively work to learn how to use these tools, building prompts, projects, and even agents that help them generate new ideas, improve the quality of their outputs, and speed production.

AI can be a powerful thought partner and expert collaborator for marketers across disciplines. Capitalizing on all the potential of AI requires time investment and a culture of experimentation and learning. The heads of marketing teams should lead by example here, finding ways to put AI to work for the benefit of the team, sharing knowledge, and empowering the team with tools that augment their capabilities.

To maximize the benefits of AI tools, marketers need to not only develop new skills but also hone their expertise and attention to detail. As AI outputs improve, it will become harder for even the most seasoned expert to spot errors. Marketers must not only review AI-generated content for quality and brand fidelity, but also ensure they are fact-checking AI outputs carefully. AI can empower marketing teams to produce better work more efficiently. But only if they hold AI to high standards and maintain close oversight.

Technology is the execution accelerator for B2B marketers as they work to upgrade the creativity and the impact of their efforts. By embracing technology tools and essentially feasting on the technology bounty, marketers can upgrade their external-facing content output and internal stakeholder management.



To maximize the benefits of AI tools, marketers need to hone their attention to detail.





Where to start

If marketers find themselves in a reactive posture, scrambling to field ad hoc requests and feeling the pressure of a demanding C-suite, shifting the marketing operation to be more creative and customer-focused can seem overwhelming. Here are concrete actions they can take to get started:

- 1 Find out what you have:** Marketers should audit their current repository of content. Scrutinize campaign results. Look for obvious gaps (e.g., a dearth of video content) and patterns (e.g., above-average time-on-page numbers for new product launch landing pages). Where are there signs of deeper engagement? What topics or types of content are driving that engagement?
 - 2 Learn and create a plan:** With gaps identified and some knowledge of what resonates with your key audiences in hand, marketers should pick the brains of their subject-matter experts. Use these “download” conversations to build out the start of a revised content calendar, implementing the “editorial mindset” concept we discussed earlier to identify topics that will engage your customers and prospects. Treat this calendar as a living document that you revise continuously in light of new findings, trending topics and shifting business priorities.
 - 2 Determine your KPIs:** With a starter plan in place, you are ready to identify the select KPIs that connect most closely with your marketing and business goals. KPIs will look different for every company. But, no matter which you select, ensure you can articulate to your internal stakeholders the “why” behind your KPIs, your plan for tracking and reporting, and how you will adjust in line with results.
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This is only the beginning, and B2B marketers must always be willing to pivot in response to new data and changing circumstances. So, the strategic effort never truly ends. But by getting command of what they are working with, beginning to reset the content effort, and refining KPIs, B2B marketers can successfully reorient their efforts toward customers and prospects.

An urgent appeal to B2B marketers

B2B marketers should face their current challenges and march into the future with great confidence. After all, creative performance marketing is fun to execute, and it is possible, even for the most technical companies and the leanest teams.

As we have discussed, there's no need to create a false choice between a creative marketing effort and a data-driven one. By focusing outward on customers and prospects, recrafting the internal stakeholder story, and embracing technological accelerators, marketers can develop standout campaigns that build trust and long-term relationships with customers and prospects. The result? Brands that bring technical material to life and become go-to, trusted resources for customers and prospects.

It's time for B2B marketers to unlock their creativity, embracing creative performance marketing to amp up the quality of B2B marketing materials and campaigns while delivering the results stakeholders need to justify marketing spend. Those who do will put their companies in the best position possible to thrive in an era of accelerating content consumption, platform proliferation and competitive pressures.



Want to reframe your marketing challenges into creative clarity?
Contact The Agency at Sikich.

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