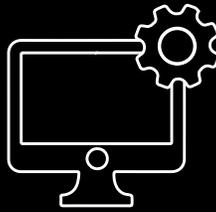


The B2B Marketing US Agencies Benchmarking Report 2019

2019



US

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Introduction

Fascinating, unique, varied and vibrant – welcome to the world of B2B agencies



Joel Harrison,
editor-in-chief,
B2B Marketing

Welcome to our third annual US B2B Agencies Benchmarking Report – which provides the best and clearest picture of this fascinating and dynamic ecosystem. The agencies included in this report, and listed on the associated league tables, represent the range and sheer diversity of B2B agencies operating in the US today. It's a picture which continues to morph and develop each year, as the protagonists adapt to changing market conditions and client demands. It's fascinating to examine the different strategies that B2B agencies are adopting, which are as diverse and contrasting as they are – you can read more about this in our [Vive la différence] article, on page 14.

One thing abundantly clear is there's no such thing as a 'typical' B2B agency – cultures, expertise, personalities, geographies,

histories, aspirations and many more factors conspire to create profoundly different organisations, albeit frequently offering a comparable range of services.

In this report, we provide financial and other information on 39 of the most forward-looking and ambitious of these. From nimble start-ups, to highly focused boutiques, to global full service players, there are examples of all these and more within the pages of this report. If you're looking for a B2B agency to meet your marketing needs over the coming months and years, be they tactical, strategic or everything in between, I'm certain you'll find your perfect partner within these pages. Or if you're simply looking to understand more about the rich, fascinating and constantly surprising world of B2B, I'm also certain there's lots you'll learn from this report.

Introduction

Agencies and clients need to align core values for long-term partnerships



Andrew Mahler,
co-founder and CEO,
The Mx Group

In 2019, marketers and agencies will face new opportunities, challenges and paradigms. We will also see the continuation of recent trends, such as the influx of B2C expectations in the B2B space. Understanding how to respond to this shifting landscape will be crucial to understanding what it takes to win.

A customer-centric world

In our post-GDPR world, buyers have much more control, and many tried-and-true tactics are now off-limits. As regulations and customer expectations shift what's acceptable and effective in marketing, we need to refine our customer experiences, leveraging data and insights while respecting privacy. Buyer-centric sales and marketing can actually make B2B businesses more powerful by relinquishing control to end users.

The top organizations will provide valuable 'aha' moments that lead to sales, retention and expansion.

Multiple connections

So how should marketers and agencies respond to this unparalleled opportunity to engage B2B consumers on their terms? Digital is critical for delivering the always-on, globally responsive yet locally relevant experience customers have come to expect. But true connections with today's buyers require a more sophisticated, nuanced approach — including the interplay of digital strategies with traditional tactics like print, telemarketing and direct mail. This high-touch approach is critical in high-stakes B2B, particularly when complex buying decisions require converting multiple stakeholders over a long period of time.

The right agency fit, with aligned core values

As the demands on marketers become more complex, expectations for agencies are also evolving. Clients are exploring the full spectrum of firms to find the right partner — a single RFP might include integrated agencies, specialized agencies and consulting firms. This crowded field actually offers B2B agencies a key opportunity to stand out.

Though B2C expectations permeate the customer experience, clients increasingly value B2B specialist agencies for their industry expertise and their acuity with differentiated approaches. These agencies combine deep B2B knowledge with a fully integrated set of services (from strategy to creative to demand generation), making them especially attractive to clients that hunger for consolidated agency relationships.

More and more, I see clients seeking a partner to function as an extension of their team. As the B2B agency landscape continues to grow and thrive, clients are beginning to see fully integrated capabilities as table stakes, with agency culture as the true differentiator. Agencies and clients need to align on core values in order to work as a unified team. When these relationships are centered around shared priorities, they create a mutually beneficial atmosphere where long-term partnerships can thrive.

For marketers and agencies, the greatest opportunity lies in two contrasting strategies: holding tight to core values that help them align with clients, while releasing control of the buyer's journey. Far from restricting marketers' potential, these opportunities reveal a runway for growth and success, in 2019 and beyond.



League tables

Top US B2B marcomms agencies

Rank	Agency	Type of agency	GI in \$m in latest financial year	YoY GI % change	Rank in 2018	Change	Headcount	% YoY change in headcount	% of GI from B2B operations in latest financial year
1	gyro (p.54)*	Creative	41	-14.6	1	—	375	116	95
2	Yesler	Integrated	36	20	5	↑	239	15	100
3	Eric Mower + Associates*	Integrated	28	-12.2	4	↑	170	-6	76
4	The Mx Group (p.68)*	Integrated	16.6	18.6	7	↑	110	0	100
5	DWA*	Integrated	15	42.9	12	↑	107	65	100
6	Gelia*	Integrated	14.7	2.8	n/a	*	116	5	77
7	Walker Sands Communications*	Integrated	13.8	60.5	13	↑	116	38	85
8	Quarry (p.62)*	Demand generation	12.1	14.2	9	↑	98	3	100
9	Stein IAS*	Integrated	11.1	5.7	10	↑	75	7	95
10	Godfrey (p.52)	Integrated	10.3	-5.5	11	↑	86	-3	100
11	DeSantis Breindel*	Creative	8.3	6.4	n/a	*	26	8	100
12	CG Life*	Integrated	7.9	12.9	15	↑	44	13	100
13	Iris Business (p.56)*	Creative	7.3	30.4	n/a	*	32	-66	90
14	Somnio Solutions*	Integrated	7.2	-33.9	8	↓	32	0	100
15	Stirista*	Digital	7.2	50	18	↑	44	10	88
16	Retina (p.66)*	Digital	6.2	98.7	n/a	*	107	26	85
17	LoSasso Integrated Marketing	Integrated	6.1	24.5	n/a	*	41	-7	50

Rank	Agency	Type of agency	GI in \$m in latest financial year	YoY GI % change	Rank in 2018	Change	Headcount	% YoY change in headcount	% of GI from B2B operations in latest financial year
18	Annuitas	Demand generation	5.7	43.2	n/a	*	40	43	95
19	April Six*	Integrated	5.3	24.4	20	↑	31	19	100
20	CBD Marketing*	Integrated	5.1	-1.9	17	↓	35	-3	90
21	TriComB2B (p.70)*	Integrated	4.8	23.1	n/a	*	35	13	100
22	Schermer*	Integrated	4.8	24	19	↓	32	7	100
23	Directive*	Demand generation	4.7	80.8	n/a	*	55	206	90
24	MarketReach*	Integrated	4.3	2.4	21	↓	40	11	98
25	Point To Point (p.60)*	Digital	4.1	7.9	n/a	*	27	23	100
26	Littlefield Agency*	Integrated	3.7	12.1	23	↓	24	0	55
27	Ledger Bennett*	Digital	3.6	300	n/a	*	12	200	
28	Omobono*	Digital	3.1	29.2	28	—	22	38	100
29	ER Marketing*	Integrated	3	1.4	27	↓	20	11	100
30	The Marketing Practice*	Integrated	3	172.7	22	↓	22	57	100
31	Davis Harrison Dion*	Integrated	2.8	3.7	n/a	*	25	4	52
32	Red House B2B Marketing (p.64)*	Demand generation	2.8	12	25	↓	27	4	98
33	Kingpin Communications (p.58)*	Integrated	2.6	136.4	30	↓	5	67	100
34	Spire Agency*	Creative	2.6	116.7	n/a	*	12	20	100
35	Pepper Group	Integrated	2.5	-20	26	↓	17	0	100
36	David James Group*	Integrated	2.4	21.8	29	↓	19	12	84
37	MOI*	Creative	1.9	72.7	n/a	*	8	60	100
38	Thulium*	Digital	1	809.1	n/a	*	9	125	100
39	Acumen Studio	Content marketing	0.8	56.9	31	↓	6	50	100

*financial information provided has been verified



League tables

Top 15 fastest growing US B2B marcomms agencies

Rank	Agency	YoY GI \$ change	YoY GI % change	GI in \$m in latest financial year	Headcount	% YoY change in headcount	Rank in 2018	% of GI from B2B activity in latest financial year
1	Yesler	6	20	36	239	15	5	100
2	Walker Sands Communications	5.2	60	13.8	116	38	13	85
3	DWA	4.5	43	15	107	65	12	100
4	Retina (p.66)	3.1	99	6.2	107	26	n/a	85
5	Ledger Bennett	2.7	300	3.6	12	200	n/a	
6	The Mx Group (p.68)	2.6	19	16.6	110	0	7	100
7	Stirista	2.4	50	7.2	44	10	18	88
8	Directive	2.1	81	4.7	55	206	n/a	90
9	The Marketing Practice	2	173	3	22	57	22	100
10	Annuitas	1.7	43	5.7	40	43	n/a	95
11	Iris Business (p.56)	1.7	30	7.3	32	-66	n/a	90
12	Kingpin Communications (p.58)	1.5	136	2.6	5	67	30	100
13	Quarry (p.62)	1.5	14	12.1	98	3	9	100
14	Spire Agency	1.4	117	2.6	12	20	n/a	100
15	LoSasso Integrated Marketing	1.1	22	6.1	41	-7	n/a	50

League tables

Top 12 international B2B marcomms agencies

Rank	Agency	Type of agency	Global GI in \$m for latest financial year	Global GI in \$m for previous financial year	YoY GI \$ change	YoY GI % change	% GI from outside the US
1	BBN International	Partnership	109.20	100.9	8.3	8.25	55
2	gyro (p.54)	Creative	84.3	80	4.3	5.4	52
3	DWA	Integrated	27.8	20.7	7.1	34.3	46
4	Iris Business (p.56)	Creative	25.6	23.5	2.1	8.9	71
5	Stein IAS	Integrated	18.8	17.5	1.3	7.4	40
6	The Marketing Practice	Integrated	17.8	14.4	3.4	23.6	83
7	Quarry (p.62)	Demand gen	14.1	14.9	-0.8	-5.4	14
8	Omobono	Digital	13	11.4	1.6	14	79
9	Kingpin Communications (p.58)	Integrated	11.7	10	1.7	17	83
10	Ledger Bennett	Digital	11.7	8.3	3.4	41	69
11	MOI	Creative	10.1	7.5	2.6	34.5	81
12	Retina (p.66)	Digital	9.6	5.2	4.5	86.4	44

- * **New entry:** Included in the survey for the first time
- ↑ **Move up rankings**
- ↓ **Move down rankings**
- **Stay the same**
- ↗ **Re-entry:** Returning to the survey after a year's absence
- **New agency:** Newly formed agency

Gross income is calculated by deducting external media and production costs from the invoiced total. It includes income from all above-the-line and below-the-line activity. If the agency has been subject to a takeover or merger during the financial year in question, gross income includes the combined figure.



Section 2

Market analysis

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Vive la différence!

The fastest-growing US B2B agencies have a diverse set of backgrounds and business models, and may provide clues to the future shape of the agency landscape, writes **Joel Harrison**

B2B agencies in the US are riding the wave of transformation sweeping through the industry – and many are thriving. That’s the most obvious conclusion to be drawn from the figures contained in the 2019 US B2B Agencies League Table, which shows a frankly staggering average agency growth figure of almost 60%.

Without wishing to take the gloss off this figure, it needs to be taken in context, and for this, there are three factors to consider. First, the numbers provided in this report remains a small (although growing and increasingly significant) snapshot of the B2B agency sector in the US, and is not (yet) comprehensive in its reach or scope. Second, those agencies experiencing poor performances over the last 12 months are least likely to provide their data – for the obvious reason that they don’t want to publicise it. Third, many of the agencies listed are relatively small

and therefore will find it easier to achieve dramatic growth figures.

But despite these qualifications, this overall performance from B2B agencies remains impressive and important – it demonstrates that the sector is healthy, vibrant and dynamic. Most significantly, it remains successful despite the many challenges and headwinds the market presented it with during 2018. We can conclude that it’s in good shape to tackle whatever 2019 throws at it.

A broad church

Looking at the main League Table (see page 8), it’s apparent that there are a wide range of B2B agencies represented, with very different characteristics, areas of expertise and locations across the US. There are some that are laser-focused on a particular discipline or industry

sector, and there are those that come from very unconventional agency backgrounds, sometimes evolving from organizations that didn't even describe themselves as agencies.

It's also worth noting that this main League Table incorporates a mixture of both well-established agencies, with long tenures, broad reaches and wide brand recognition (in particular, gyro, Mower, Godfrey and Stein IAS), alongside others at the opposite end of the spectrum, who are relative newcomers to the sector (at least in the US). The challenges inherent in managing these established shops versus the newcomers are obviously profoundly different.

But if we focus on the Fastest Growers League Table (see page 10), it is apparent that many of those listed prominently here are outsiders that typically don't conform to the conventional model of full-service, mid-sized, creatively-orientated agency. At the same time, however, there is little consistency between the members of this group – they are a very diverse bunch. It may be that they provide a snapshot of how this buoyant sector is evolving, and what we can expect to see more of in future.

Non-traditional origins

Given the different backgrounds, specialisms and orientations of this year's fastest growing agencies, it's unsurprising that they provide a variety of quite different answers to the question: "What factors will determine the success of B2B agencies in the future?" For most of them, however, it hangs off some degree of specialization, expertise or point of difference.

For Ted Kohnen, president of San Francisco-based Retina, it's all about martech, and related expertise.

"Martech will be the foundation for future success. It's about having genuine acumen in this area, and applying it to the traditional scope of marketing. And that means more than just being able to send a few emails from Marketo. It requires real deep-tissue martech acumen. The tech itself is still evolving, and those agencies at the forefront will continue to lead the charge."

Kohnen says there are a growing number of agencies who claim to have this level of expertise, but in many cases these claims are not credible – and in many cases, he says, it's 'bullshit'. While to date, martech adoption and deployment by agencies has generally been conducted by traditional creative agencies bolting on these services to their established offering, (sometimes awkwardly), Kohnen says this scenario has started to reverse, with agencies rooted in tech bolting on creative services to present a rounded offering. Retina is one such agency. He adds that as the technology becomes more sophisticated and difficult to deploy effectively, it will be those with the deeper, ingrained level of knowledge and ability that are likely to win out. "There will be a redefinition of what it means to be full service," he says.

Another company entering the agency space from a non-traditional background, and performing very well within it, is Austin-based Stirista, which was founded by Ajay Gupta. "We started out as a data company, then became a data-driven agency, and recently we have incorporated traditional agency disciplines, such as a creative team. Most other agencies evolve the other way around."

Gupta says this non-traditional evolution has allowed it to think differently to competitors about its proposition and offering. "What's

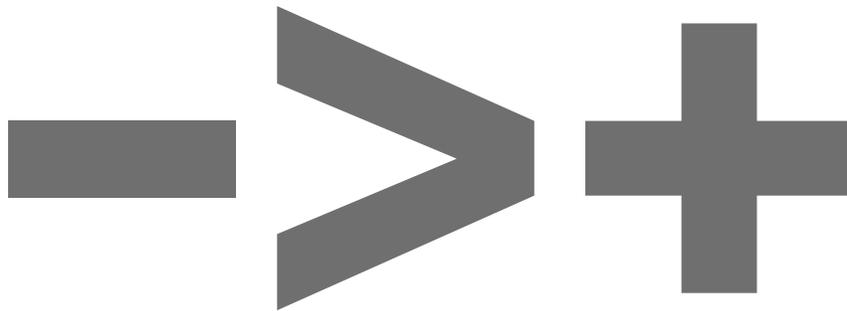
driven our success is transparency, in terms of media buying. Very few agencies admit or are open about their margin and fees. We are very transparent and upfront. Our clients always understand what they are paying. This is a trend that has filtered down from big global brands like P&G, and there's been a ripple effect. It's now firmly part of our proposition and is a selling tool."

"There will be a redefinition of what it means to be full service"

Do one thing and do it (very) well

While some agencies are choosing to specialize around their core competencies (martech for Retina, data for Stirista) others are focusing on specializing on particular marketing channels. Los Angeles-based Directive Consulting is focusing on SEO and PPC, dropping other services from its roster, explains CEO Garrett Mehrguth. "Our aim is to be recognized as 'best-of-breed' for SEO and PPC." He says this move towards specialization is welcomed by clients who are becoming disillusioned by the large agency groups trying to offer all services under one roof, but without sufficient consistency, let alone ability to offer true excellence. "Full service agencies are starting to get their butts kicked," he says.

In the past, Directive had a broader offering, including content creation specifically, but he says clients are



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ESSENTIAL MEANING TO CONNECT AND DRIVE ACTION.

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increasingly seeking to bring this activity in particular inhouse. “External content creators will never know enough about the critical issues, or how the organization operates. The content they create isn’t bad, but the way it is executed is just not the same as it would be if it had been produced internally. Bridging the gap requires clients to invest more than they are prepared to pay [for content]. That wasn’t a problem that I wanted to solve,” he says. For Directive Consulting, the future is about being focused on where it can genuinely lead, and demonstrate excellence.

Another agency which is conspicuously specializing on a single discipline is Thulium, run by wife and husband team Tamara and Mike McCleary. In 2017, the pair took the decision to focus only on social media, repositioning from a broader, more integrated proposition, and this move quickly paid off with Thulium scoring a quick succession of significant wins which turbo-charged its financial performance in 2018 (which is reflected in its financial data provided for this report). The advantage of specialization, according to Mike McCleary, is pretty obvious: it enables a depth of understanding of this channel, and how to use it effectively. And for Thulium, that means attribution and a clear demonstration of ROI. “There are lots of people out there doing social, but we don’t see anyone else really doing it well.”

McCleary accepts that the maturation of social media as a channel also played a part in Thulium’s decision to make it their one and only offering. “It’s generally become more mature, but there are still elements of the Wild West about it!” He says business leaders are becoming gradually more comfortable with social, and are therefore more realistic and committed to make it work

effectively, but still fall into the trap of thinking that employing a millennial and letting them oversee a Twitter account is sufficient to drive ROI from social. As Tamara McCleary succinctly says: “This is not a robust social media strategy, and it won’t generate business for you.”

“There are a lot of people trying to pull together a cohesive offering, but very few are doing it well”

Is specialization relative?

Elsewhere, meanwhile, there are starkly different opinions about specialization. For Seattle-based The Marketing Practice (TMP), the nature of the local agency landscape means B2B is a specialism in itself, and that represents a good niche in the vibrant local economy. “We’re seeing lots of smaller agencies taking business off the larger ones,” says Matt Harper, MD and EVP of TMP, who believes the larger agencies don’t have the depth of knowledge in B2B, and aren’t able to deliver effectively. “It can be a strange juxtaposition – large global brands working with small local agencies.”

At the completely opposite end of the specialization spectrum is Walker Sands, which has its HQ in Chicago, and offices elsewhere. President Mike Santoro explains that the agency’s growth has leveraged a broad and integrated offering, which includes PR, demand gen, branding, digital and video. “There are a lot of people trying to pull together a

cohesive offering, but very few are doing it well,” he says. “We expect another year of double-digit growth. Marketing is moving faster than ever. Good agencies are keeping their clients ahead of the curve by offering robust integrated services... [that] are strategically working together to get real business results.”

It seems clear that it’s possible to make a good argument for both specialization and generalization, and that well-run agencies with good people and solid management practices will thrive with either strategy. Clients must choose which approach best fits their needs, beyond the usual focus on chemistry, philosophy and market insight, etc. However, it seems plausible that established enterprise companies are more likely to be in a position to demand and effectively utilize best-of-breed specialists, while mid-market and emerging smaller companies are more likely to require the economies of scale that can be achieved via an integrated ‘under-one-roof’ offering.

Privacy looming large

While all the agencies interviewed were bullish about their performance over the past 12 months, and the potential to continue this over the coming year, all acknowledged the future would not be without challenges. Beyond those relating to the economy in a general sense, escalating trade wars and Brexit, a few challenges in particular stood out.

Data privacy will be one of these, according to Ajay Gupta of Stirista. “Europe had GDPR in 2018, and now some states in the US are introducing privacy laws,” he says. “This will affect what media can be bought and what kind of targeting can be done.” He says the implications and repercussions are hard to determine just now, and that the level of preparation is very

mixed because of the uncertainty. “It will create a very interesting and challenging environment, particularly if California goes full throttle towards legislation. Traditionally the US has had very liberal data laws. We don’t fully understand what [data privacy] will mean in the US yet. Many people are probably wondering if and how California will be able to enforce privacy legislation without Federal Law. But we will start seeing an impact from it.”

Paul O’Malley, EVP of Kingpin Communications, believes that we’re already starting to see the repercussions, particularly given the Canadian Anti-Spam Law, which became law in 2017 and is less stringent but closer to home than GDPR. “It’s already made people more mindful about how they communicate with their audience,” he says.

Like all the other agencies I spoke to, O’Malley is clear on another perennial challenge for agencies, which is likely to become increasingly acute in the future: personnel and recruitment. “We’re building an agency from scratch in the US, so it’s critical to create an environment where people want to work, and want to stay. That entails giving them an opportunity to progress, so that they can see their future here in the long term.”

It’s a similar story at Walker Sands, where Mike Santoro, says, “Our motto for success is: ‘happy employees, happy clients, happy business’ – in that order. We make it a priority to maintain an employee-first culture through any amount of growth, because, it’s our employees and the great work that they produce that has driven the success.”

Harper of TMP places the onus more on recruitment than retention, as there simply isn’t enough talent with the right expertise. “We had over 200 applicants for a role recently, but

few came to the table with the right level of B2B expertise, particularly from client side.”

TMP is bridging that skills gap by investing in training – Harper explains the agency already has an academy programme, which it uses to train its staff in offices all around the world, and in particular to help them grasp the fundamentals. “We’re also giving our clients access to be involved in the academy. It’s a great means of addressing some of the recruitment challenges.”

Has the transformation only just begun?

Looking ahead, this group of fast-growing agencies has more reason than most to be optimistic about the future, but there was clear recognition that competition would remain stiff, and that continuing transformation would be required to succeed.

“Agency margins are shrinking every year,” comments Ajay Gupta of Stirista. “More and more martech tools become available, and DSPs are starting to offer managed services, doing a lot of what agencies did. Agencies have got to be focused on offering things that clients can’t do themselves. I don’t believe that agencies are going to disappear any time soon, but they need to work hard to distinguish themselves.”

Tamara McCleary of Thulium, points out that it’s not just technology that will continue to change: “Communications will continue to evolve, as will how we reach buyers, and agencies have to change alongside this. This is absolutely no time to be complacent – it’s the time to be on the precipice. You need to be thinking constantly about your future business model, and how you do business in the future. It’s a very exciting time.”

This is absolutely no time to be complacent – it's the time to be on the precipice

Back to the future?

The future of agencies isn't only about the bleeding edge – some more conventional approaches are finding new resonance and relevance

While embracing the new can be a key determinant of success for fast-growing agencies, it's not purely cutting-edge thinking, practice and tech deployment that has been instrumental in the performance of those agencies interviewed for this feature. "ABM is not going away as a trend," says Paul O'Malley of Kingpin Communications. "It has grown from being something that is aspirational a few years ago, to something which is at the forefront of what many marketers are doing."

Meanwhile, another fad or trend from the past few years appears to have come of age, says O'Malley. "AI is no longer just a buzzword. Clients assume it will be involved somewhere along the line – it's a bit like where programmatic was a couple of years ago. The challenge with AI is just how to leverage it, and use it to communicate at scale, and in a meaningful way.

At the same time, O'Malley believes the emergence of privacy legislation is starting to impact on the marketing activity. "GDPR is starting to make people mindful about how they are communicating with their audience. For example, some clients will no longer touch large scale telemarketing. The focus has switched from volume to quality. In a way, this starts looking like going back to the days when DM was at the forefront. I have had two briefs in the past week which could have been for old-school direct marketing."

Matt Harper of TMP agrees ABM has crossed from being something new into very much mainstream. "There's an obsession with ABM," he says. "But a major trend is the market becoming more complex for clients. Investments made in digital and media are not necessarily paying off – sometimes because they were given the wrong goals. Both agencies and clients are working out what to do about this. Sometimes the answer is going back to things like telemarketing and events."

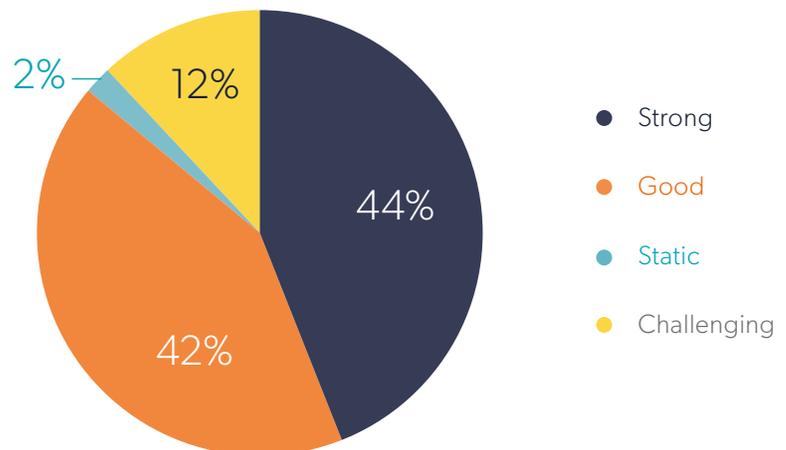
A stellar year for B2B agencies in the US

Strong performance from agencies at the top and bottom of the B2B Marketing League Table, plus most places in-between, shows that sector is booming, writes **Joel Harrison**

The US B2B agency community enters 2019 on the back of a good year – feeling bullish about its prospects and business opportunities for the year ahead. Almost 90% of respondents to the survey described the market as either good or strong for the upcoming year, while only 12% described it as challenging.

On average, agency gross income increased by 58% during the course of 2018, as compared with 17% in 2017, and 14% in 2016 (see p21). This represents extremely good annual performance, both for the individual agencies represented

How would you describe the current state of the market for B2B marketing services?

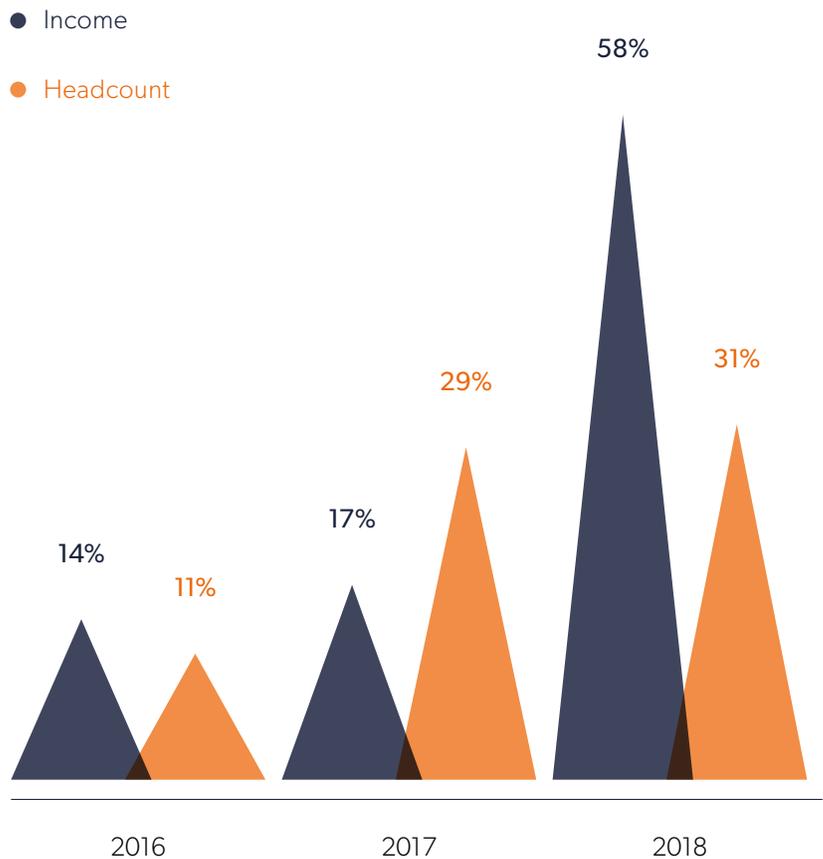


and the wider agency community. It should be said this headline average figure has been inflated slightly by a handful of agencies which achieved outstanding figures, but this shouldn't detract from good performances which were seen across the field of agencies listed in this report.

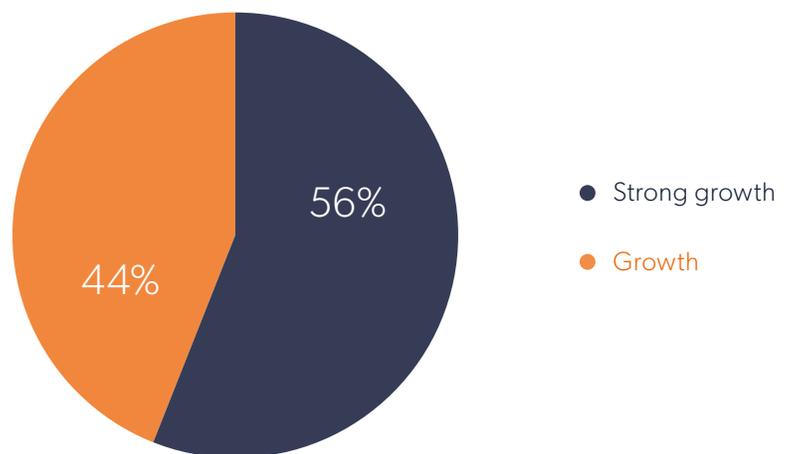
In terms of headcount, agencies grew by a more modest, but still impressive, 31% in the same period. This compares with figures of 29% in 2017 and 11% in 2016 (see right). Significantly, this didn't equate to a dramatic increase in the use of freelancers during the past 12 months, with only 29% showing a net increase in freelance usage. For the majority of agencies (55%) use of freelancers was unchanged year-on-year, with 'digital' appearing to be fast catching up to 'creative' as the main function where freelance resource is required. This suggests agencies are enabling their staff to be more efficient in how they operate and consequently returning more of this revenue to the bottom line in terms of profit.

When asked about expectations for the year ahead, this confidence went into overdrive. Almost 60% of agencies anticipate 'strong growth' during the course of 2019, while the remainder expect more moderate increases in business. Significantly, none of the agencies surveyed anticipated income remaining static or declining. There may be an element of hubris here, as the response to this question is slightly at odds with that provided via the qualitative interviews published on pages 14-19, where agency principals suggested moderate concern over the state of the global economy, and factors such as Brexit. Or at least this could represent a subtle prioritization of hope over expectation.

Year-on-year comparison in income and headcount growth



What are the expectations for your agency in the next 12 months?



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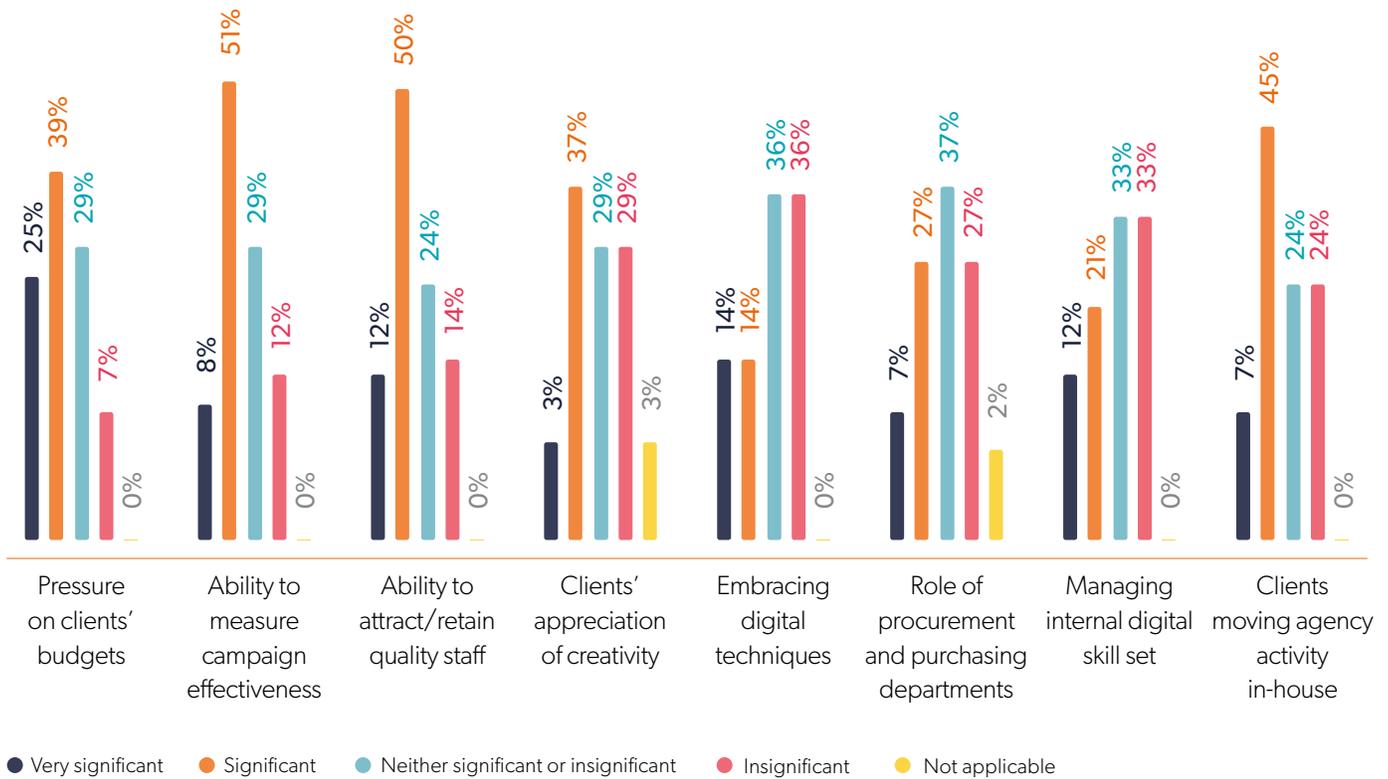
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How significant are the following challenges to your agency currently?



Digital skills and recruitment top concerns

As ever, 'pressure on clients' budgets' remains the most acute concern for B2B agencies, with 64% regarding it as a significant concern – and almost half of those regarding it as very significant. Trying to secure more budget for more and/or better marketing activities (and consequently billings!) is the fundamental challenge facing agencies, so it's hardly surprising that this tops their list of concerns – it probably always will.

Perhaps more interestingly, staff recruitment and retention was regarded as the second most pressing concern, only narrowly behind budgets access, highlighted as significant by 62% of respondents (although only 12% regard it as very significant – half the number for 'budgets').

Measurement was another perennial challenge which predictably featured strongly in the response to this question, with 57% of agencies regarding the challenge as significant or 'very significant'. Arguably, if agencies were better

able to address this, they may find the issue of budget allocation less difficult by consequence.

However, the most interesting response from this question was the amount of concern about 'insourcing' of marketing activity by clients – this was highlighted by 53% of respondents, putting it as the fourth most pressing concern. Potentially, it reflects the ability of martech to increase the amount of marketing they can execute effectively, and may represent the biggest threat to agencies in the future if it continues to grow.



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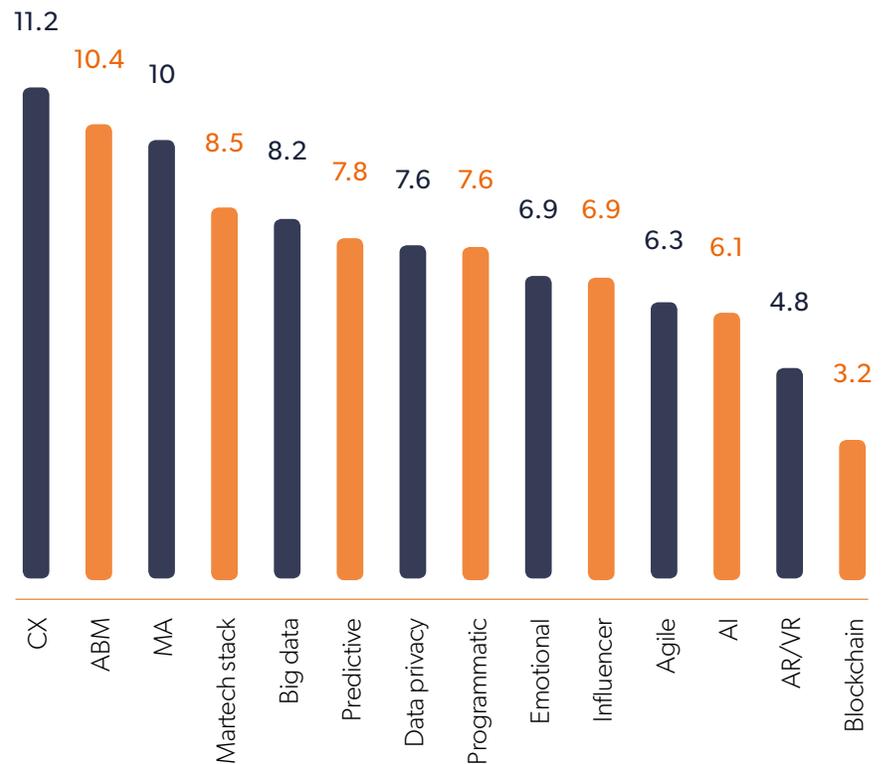
Key services and current trends

The response to questions in this section revealed a potential disparity or mismatch between the services agencies are offering, and where they perceive the current trends and opportunities to be.

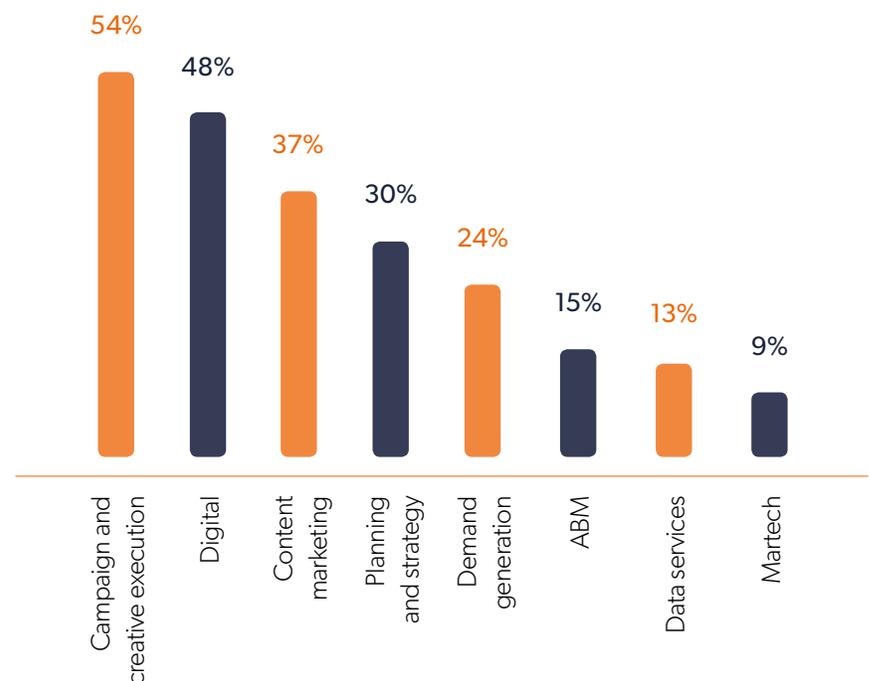
While agencies placed ABM, martech and data-related activities as among the most important trends impacting on the B2B marketing industry at present (with CX as the number one trend) these were not proportionately reflected in the list of most popular services offered by agencies. This suggests that, at best, there's a lag between what agencies believe clients are looking for, and their ability or focus to deliver it. In the case of ABM, which remains a relatively new trend to have impacted the market, perhaps this is unsurprising – many agencies have yet to determine how to offer this as a service (or if it's relevant to do so). But in terms of marketing automation, which has been around for at least a decade, this is slightly more alarming.

In terms of interest in data, and related privacy issues: as discussed in the feature on page 36, given that GDPR-like legislation has yet to arrive in the US, it's likely that there is a lag in terms of understanding the implications of this topic, which would inevitably feed into building strategies to address it. However, given the pace at which this issue is gathering momentum, and the extent of the potential impact on marketing, it's something that agencies need to get to grips with as a matter of urgency.

Industry trends (weighted average in descending order of importance)



Most popular services offered



Tech is powering the future of B2B agencies

B2B agencies are becoming increasingly tech-enabled, tech-aware and tech-savvy – as demonstrated by the broad range of platforms that they are using, in a variety of categories.

Joel Harrison reports

For the first time, this year's US B2B Agencies Benchmarking Report has provided an insight into martech usage and licensing, along with which platforms are most relevant and popular in the agency sector. The most prominent names to emerge from this research include Marketo, Hootsuite, Pardot, Adobe, DemandBase, Basecamp and WordPress.

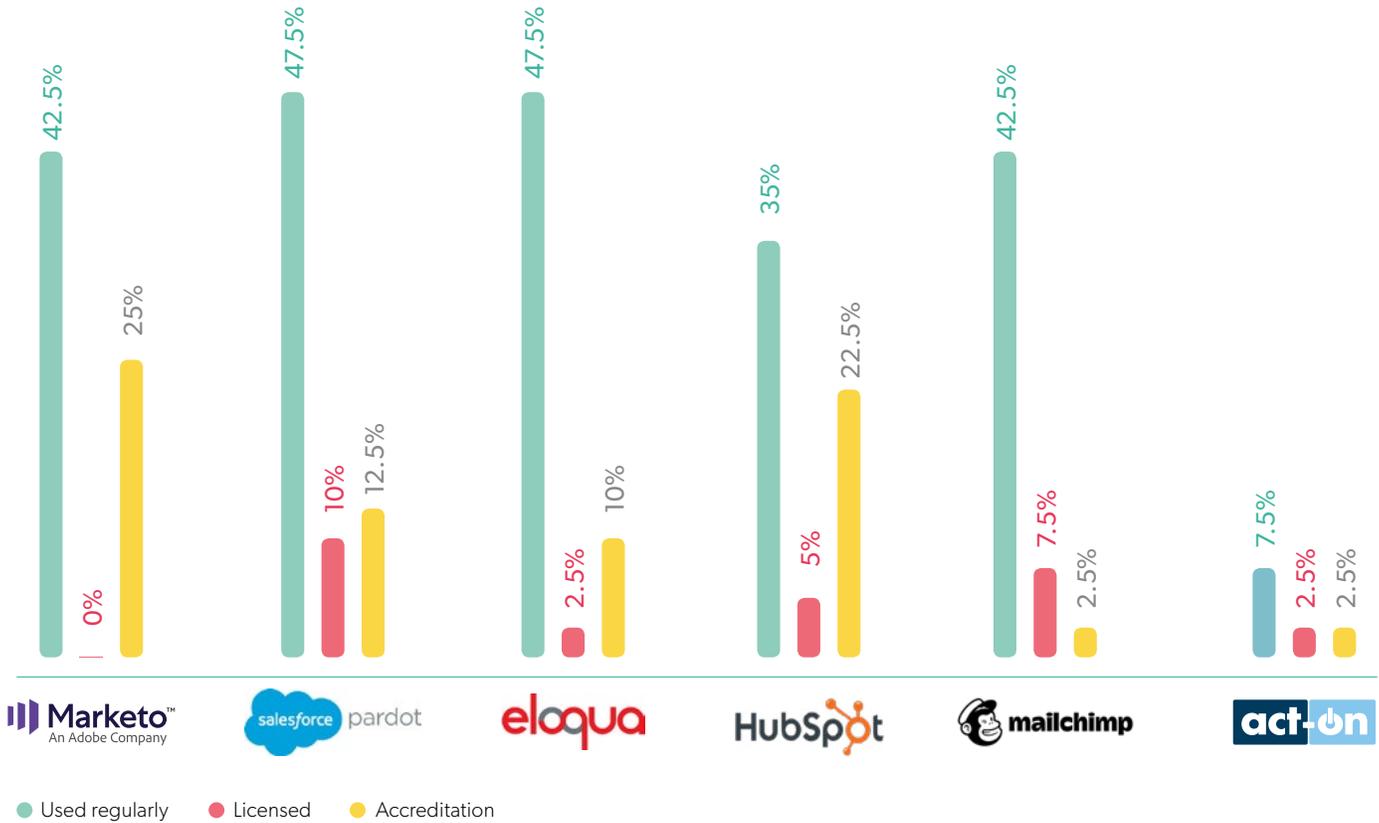
When it comes to marketing automation, which is clearly the most important martech platform

in most agency's tech stacks, the survey demonstrates a huge proliferation in platform usage, with little to choose in overall popularity between Marketo, Pardot, Eloqua, Mailchimp and Hubspot. Given the very limited level of marketing automation platform licensing, it seems likely that agencies are simply using whatever MA system is relevant for the particular client that they are working with. It's interesting to note the residual

popularity of Eloqua among agencies, despite its lower profile and apparent slower development since acquisition by Oracle.

While Marketo was the least popular marketing automation platform in terms of licensing by agencies, it was the most popular in terms of accreditation or certification – in other words, it was most important for agencies to know how to use Marketo, without necessarily needing to buy it themselves.

Marketing automation platforms used by agencies



Which platform has had the biggest impact on your business?

Although Marketo doesn't have category dominance for marketing automation in the same way as Adobe does for creative/content production, it's clear

that it's making the biggest impact on agencies' business. In many, it's likely that Marketo is underpinning several of the programs they are executing.



DEMAND

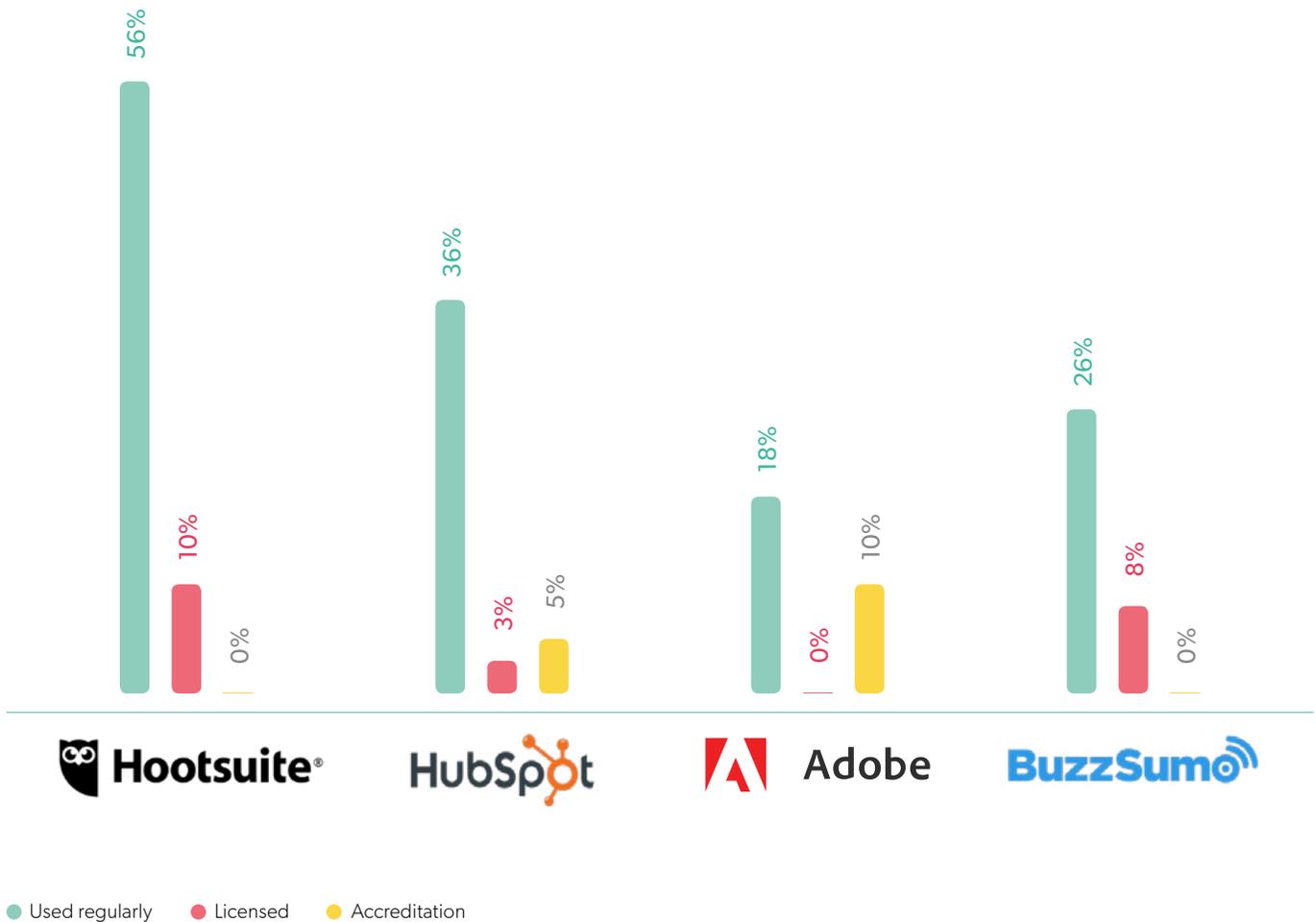
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Most popular social platforms



Hootsuite dominates social

In terms of social media platforms, Hootsuite was far and away the most popular used by B2B agencies, significantly ahead of BuzzSumo, the only other dedicated social platform to demonstrate significant traction. However, it's interesting to note that both Hubspot and Adobe

(which offer social capabilities as part of a broader marketing-related functionality) were among the leading platforms. This demonstrates the growing integration of social activities within wider marketing campaigns, and the benefits of operating from a single platform, in terms of closer integration and clearer analytics.

This demonstrates the growing integration of social activities within wider marketing

Demandbase is the most popular ABM platform

As identified in the agency trends article (page 20), account-based marketing is one of the hottest trends and still-expanding service areas for B2B agencies. Inevitably, this will be reflected in the martech platforms that are being used or deployed. While strategic or one-to-one ABM has less requirement for tech with specific functionality, and can be conducted to a certain extent using the same tech as deployed for demand gen, for programmatic or one-to-many ABM, there is a much

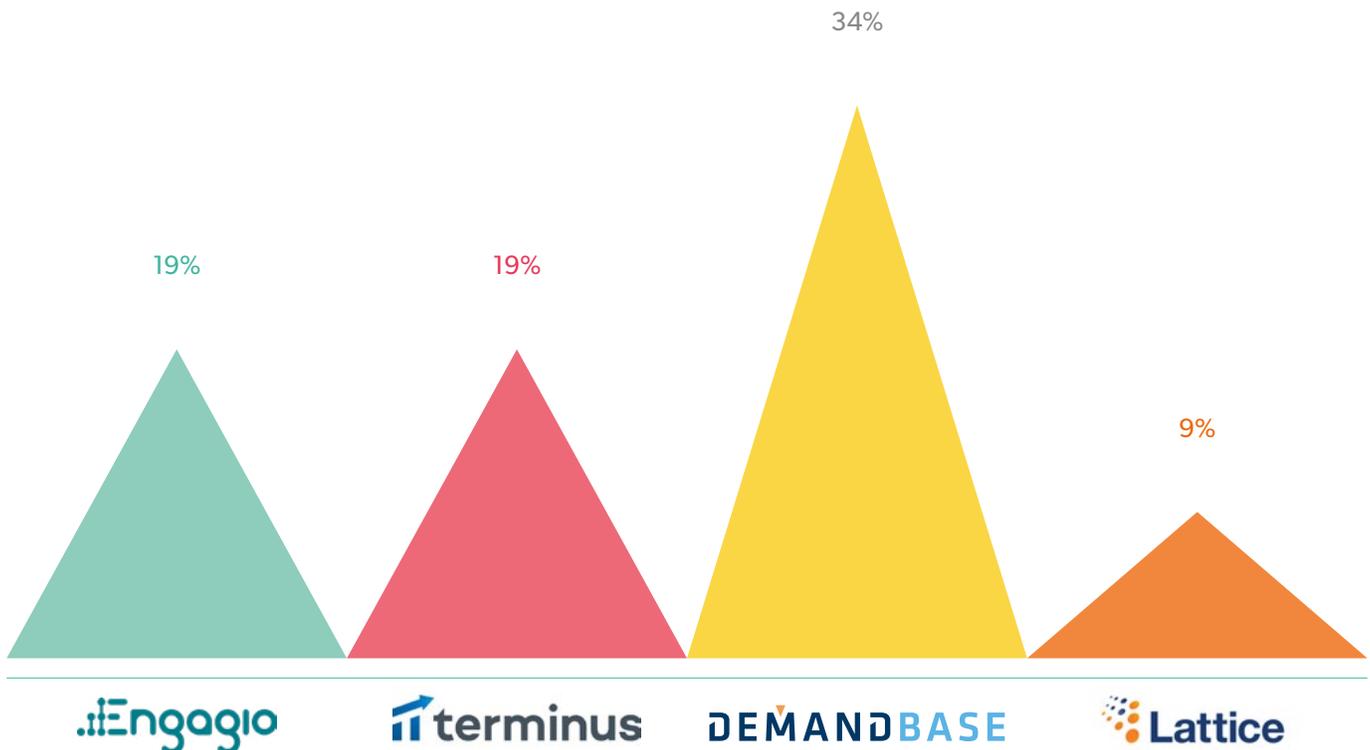
greater need for and therefore reliance on core platforms. Currently, adoption of these platforms remains relatively low, at least compared with marketing automation, for example, but this is unsurprising in context with the general lag in the transfer of ABM as something that agencies see as potent, to a discipline that they are actually offering widely.

Of the specific ABM platforms covered in the survey, Demandbase was shown to be the clear leader, with over a quarter of respondents currently using it – by way of context, this is just over half the number using Salesforce Pardot, which is the most

widely-used marketing automation platform amongst B2B agencies.

Demandbase's clientele is double that of Engagio and Terminus, the second and third most popular dedicated ABM platforms referenced by respondents. Lattice Engines was fourth most popular, while other platforms failed to register any users at all among the respondents to this survey. Given the ongoing hype surrounding ABM, and the bandwagon for related technology, it will be fascinating to watch how this particular martech sub-sector evolves.

Which of the following account-based marketing (ABM) platforms do you use?



Agencies are flexing their martech muscles

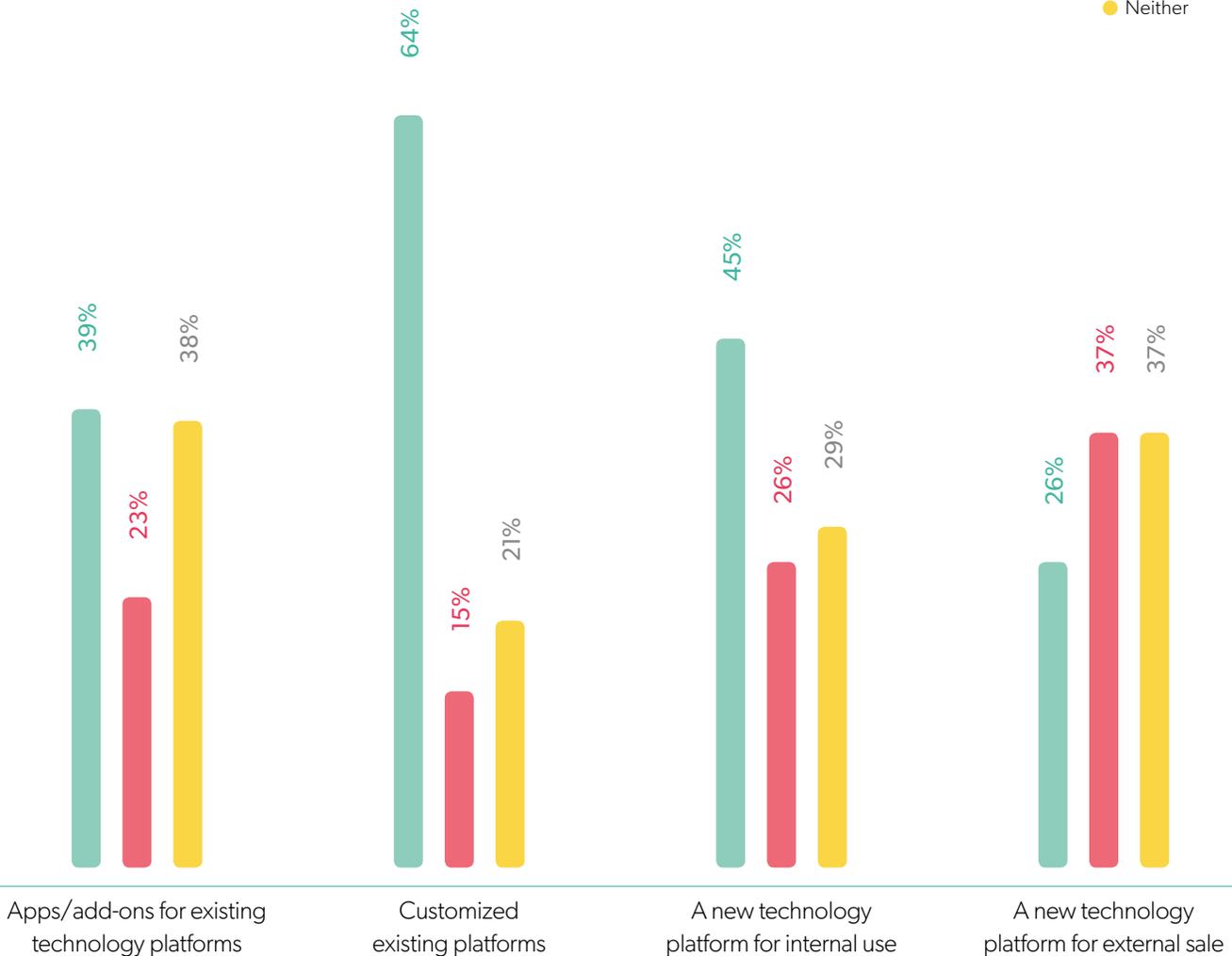
It's clear from the response to this year's survey that agencies are becoming more deeply immersed in tech development and that many are building-in martech expertise as a core discipline. In the past 12 months, almost two-thirds worked on customization projects for existing

platforms, while almost half worked on a new tech platform for internal use. Perhaps most surprising of all, one in four respondents worked on a new tech platform for external sale – this suggests a high degree of tech alignment within this group of forward-thinking agencies, and that tech development work is already becoming a major competency for B2B agencies.

One in four respondents worked on a new tech platform for external sale in the last 12 months

In the past 12 months have you explored or begun developing:

- Developed
- Explored, but not developed
- Neither





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Which platforms are the most popular in the following categories?

CMS (content management systems)	 WordPress.com Wordpress	75%
Programmatic ad platform	 facebook business Facebook Ads Manager	78%
Creative content platform	 Adobe Creative Cloud	87%
Project management platform	 Basecamp  workamajig Basecamp/Workamajig	12%

Most popular platform

In three of the four categories there was a clear standout leader, none of which was particularly surprising. For CMS, the flexibility of WordPress places it above other options, although the more corporate orientated Drupal was still popular – presumably the choice relates more to client needs and context than the agency themselves. For programmatic ad platforms, Facebook was the clear leader, but

with Google in second place. These two were significantly ahead of other players, all of whom were only used sporadically at best. For creative and content platforms, it's no surprise that Adobe Creative Cloud was the clear leader, and is almost entirely ubiquitous in agencies with any kind of creative offering. It's more surprising for an agency to not have Adobe. But when it comes to project or agency management platforms, the picture was hugely fragmented, with a large number of companies

having a small slice of market share. This is partly due to the diverse and generalist nature of the challenge which this software seeks to address, which lends itself to supplier proliferation. But it does suggest that this sector is rife for consolidation – or perhaps a natural bolt-on to Adobe Creative Cloud, or one of the other cloud solution providers. Microsoft is the other player who might be expected to have a significant part of this market, and while this vendor was mentioned, it was only one of many.

What do clients

The B2B Agencies Benchmarking Report survey tells us what agencies believe is going on in the market. But does that reflect the client experience? At the end of 2018, B2B Marketing gathered a selection of client-side senior marketers to share their expectations of agencies. Paul Snell reports

The move to bring work back in-house

Perhaps alarming for agencies, the first topic client-side marketers raised during our roundtable discussion was the market's growing interest in bringing agency work back in-house. There were three primary reasons behind this:

- › Clients' inability to hold their current agency vendors to account.
- › A labyrinthine and bloated network of suppliers, which needs to be rationalized.
- › A desire to increase speed-to-market by bypassing the time spent on briefing, delivery and measurement.

Where such a strategic move was genuinely under consideration there was frequently an external catalyst. This could be either a change to the company itself (such as a restructure, merger or acquisition) or to personnel. For instance, the arrival of a new CMO often leads to a review on agency spend.

The biggest obstacle to moving resources back in-house was the difficulty of gaining buy-in from senior management who didn't want to add headcount to the bottom line.

The greatest concern expressed by marketing leaders was whether in-house staff would be exposed to fresh ideas and approaches. How might they keep those staff sufficiently motivated if they only had one or two brands to work on? Plus, how would they find the skills needed for an in-house team to begin with?

— *"It's not always a choice between employing an agency or doing the work in-house. You might be under headcount constraints, but have flexibility around a program budget that you can allocate to an agency. Employment laws are also becoming tougher; it's more difficult to get rid of people – but you can fire agencies!"*

Clients are using agencies more strategically

Another recurring theme was the use of agencies as a gateway to innovation. One client-side senior marketer explained that the agency-led rebrand it went through would not have been as brave or bold had they tackled it alone. In fact, many of the marketers we spoke to said their conservative, risk-averse brands were crying out for agencies' bold thinking.

Over the past 12 months some client-side marketers have begun

really think of agencies?

buying an agency's ideas but executing them internally. However, this wasn't popular among those we assembled – our research panel considered the execution of a proposal to be as important as the intellectual property.

— *“A good campaign is only as good as being able to deliver it. It's about bringing it to life – how that resonates with the customer, how you personalize it – the execution is so important. You wouldn't buy the idea without a detailed understanding of the delivery.”*

Global agencies face a struggle to convince clients

There appeared to be little enthusiasm among those in the room for handing over all requirements to a single global agency or network. Cost was the first concern, if not prohibitive.

Some doubted whether these 'global' agencies were actually that. Furthermore, those working in global multinationals emphasized the importance of local agencies with local knowledge – particularly when working in Asia. “A global agency we worked with couldn't get separate offices in London and Manchester to collaborate with each other, let alone offices in Brazil and Vietnam,” one marketing leader told us.

The balance of power in the relationship was also held to be crucial. The biggest global agencies will demand a strategic level of support, such as access to the CEO or board. If this can't be provided, the agency will become frustrated. Equally, if as a client you are much more powerful, your agency will find it difficult to say no to you, and just become 'yes men'.

— *“As a client, you shouldn't be pushing agencies around. You should be comfortable with a certain amount of push back.”*

Buying a happy family

The importance of personnel on an account also cannot be underestimated. The churn of these individuals is one of the biggest sources of frustration for clients who spend time training agencies on their brand, its products and services.

Greater transparency on both sides is often the key. Clients would rather know straight away if someone is leaving – even if there isn't a replacement ready. They'd rather be told the individual is leaving and that the gap is being addressed than to be told someone's leaving next week and be introduced to the replacement.

Working with good people is so important to clients that some said

they would move their business, following those people to their new role. It reinforces the idea that clients want to buy into an agency 'family' or ethos, rather than a brand.

The shape of things to come

As always, agencies will come and go but clients believe the future will see more focus on delivering specific services rather than a broad multichannel approach. However, these niche agencies may struggle to grow beyond a select group of clients because their services are so specific. This will leave space in the market for T-shaped agencies that offer a broad range of services but specialise in one or two areas.

As in 2018, we will continue to see mergers and acquisitions in the sector, but many small, boutique agencies are turning down offers. Instead, some prefer to form collectives – micro-communities of small agencies that work on referrals but don't have a shared P&L, often located in the same area. Clients anticipate this trend is on the rise.

While agencies rarely feel it's in their interest to work together (rather than compete for limited budget), our research group is very keen for their existing agencies to collaborate with each other. “If they can't, they're no longer my partner,” one said.

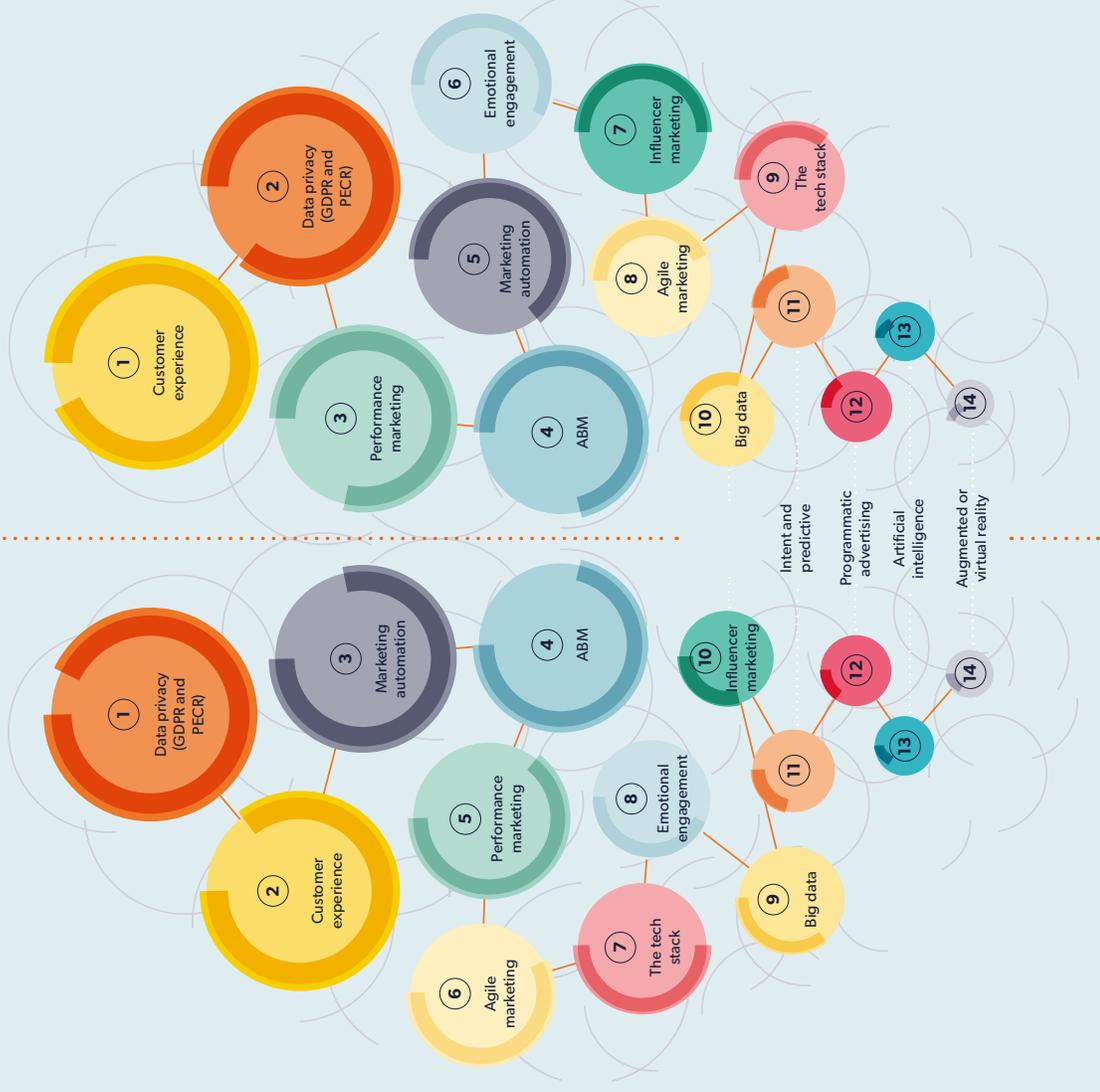
The 2019 B2B Marketing Trend Tracker: The B2B mind

Client-side

- 1 Data privacy (GDPR and PECR) ... 72%
- 2 Customer experience (CX) ... 63%
- 3 Marketing automation ... 60%
- 4 ABM ... 51%
- 5 Performance marketing ... 50%
- 6 Agile marketing ... 46%
- 7 The tech stack ... 46%
- 8 Emotional engagement ... 46%
- 9 Big data ... 44%
- 10 Influencer marketing ... 42%
- 11 Intent and predictive ... 36%
- 12 Programmatic advertising ... 34%
- 13 Artificial intelligence ... 32%
- 14 Augmented or virtual reality ... 24%

Agency-side

- 1 Customer experience (CX) ... 73%
- 2 Data privacy (GDPR and PECR) ... 70%
- 3 Performance marketing ... 65%
- 4 ABM ... 64%
- 5 Marketing automation ... 64%
- 6 Emotional engagement ... 64%
- 7 Influencer marketing ... 55%
- 8 Agile marketing ... 55%
- 9 The tech stack ... 55%
- 10 Big data ... 54%
- 11 Intent and predictive ... 48%
- 12 Programmatic advertising ... 43%
- 13 Artificial intelligence ... 43%
- 14 Augmented or virtual reality ... 35%



Marketers were asked to rate the attributes shown above, based on how focused their team was on each – from 1 (0% focused) to 10 (100% focused). Figures shown are the average scores for each attribute for both agency and client-side marketers.

The 2019 Trend Tracker:

GDPR reins supreme, but customer experience will take the lead in 2019

From ABM to the tech stack, **Rebecca Ley** looks at what agency and client-side marketers focused on in 2018, and which trends will stick around in the next 12 months

Agency and client-side marketers rate 14 trends according to how focused they are on them, showing year-on-year comparison from 2017 to 2019.

Attributes	2018 (%)	Now (%)	Next 12 months (%)
Customer experience	79	67 ↓	79 ↑
Marketing automation	69	62 ↓	75 ↑
Data privacy (GDPR and PECR)	64	71 ↑	72 ↑
Account-based marketing	63	56 ↓	70 ↑
Performance marketing	Not covered in 2018	56 —	66 ↑
Emotional engagement	60	53 ↓	63 ↑
Agile marketing	50	50 —	59 ↑
The tech stack	54	50 ↓	60 ↑
Influencer marketing	57	47 ↓	59 ↑
Big data	56	48 ↓	58 ↑
Intent and predictive marketing	47	41 ↓	54 ↑
Artificial intelligence	41	37 ↓	49 ↑
Programmatic advertising	44	37 ↓	47 ↑
Augmented or virtual reality	33	28 ↓	36 ↑

*Performance marketing was added as a trend for 2019's results

Marketers were asked to rate the attributes shown above, based on how focused their team was on each – from 1 (0% focused) to 10 (100% focused). Figures shown are the average scores for each attribute for both agency and client-side marketers.



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B2B Marketing's 2019 Trend Tracker, conducted in partnership with Savanta, surveyed senior marketers in both agency and client-side roles to see which trends led the charge in 2018, and which will remain top of the agenda in the year to come.

GDPR takes centre stage

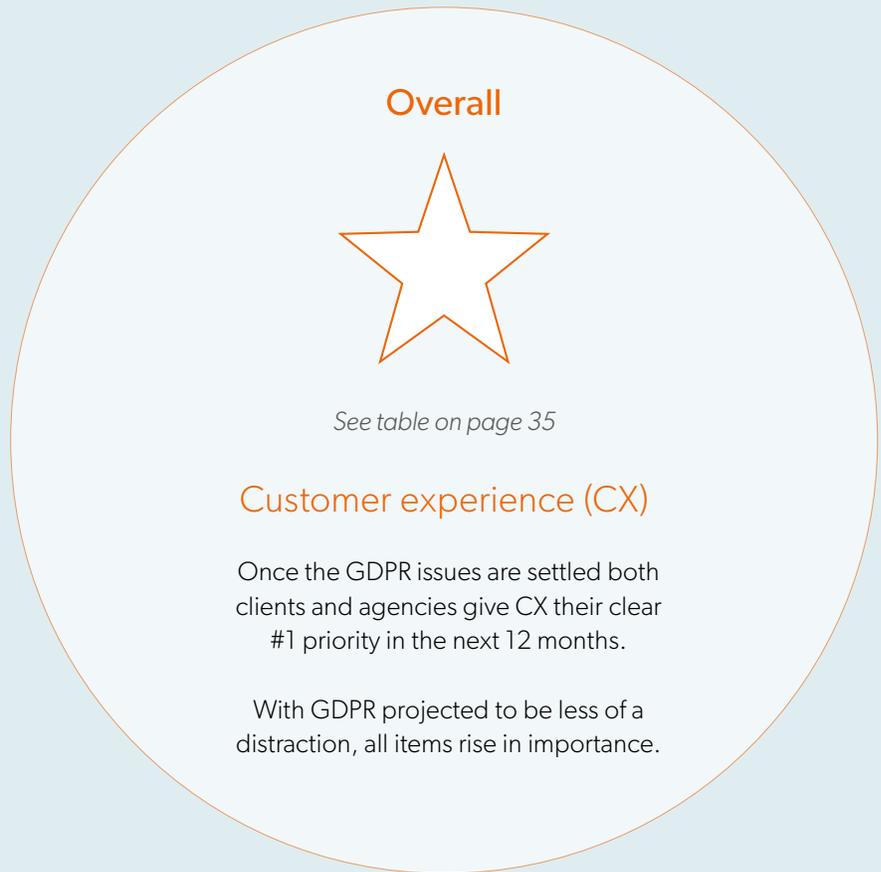
The results are in and the consensus is clear: GDPR is currently the top-ranking trend, with marketers spending 71% of their focus on it. This comes as no surprise given the legislation came into force in May 2018. Marketers have frantically cleaned up their data, worried about opt-in lists, and sought advice from agencies on what constitutes 'legitimate interest'. Compliance has been the word on everyone's lips, and so it continues.

But did it turn out to be as worrisome as predicted? The Marketing Practice brought in a GDPR specialist to support clients who felt isolated and unsure about the new legislation.

"Most clients went down the legitimate interest route instead of the opt-in route," Heather Barnett, head of marketing explains. This meant they didn't lose their entire customer database overnight. "If you were already acting with integrity and were highly targeted in what you were doing, you didn't run into trouble."

While data privacy will continue to be a focus in 2019, it will slip down everyone's agenda. And, as the focus on data privacy falls more time will be spent on other trends.

Where GDPR currently tops the table, it's predicted to slide to third place overall by 2020.



"The nervousness that was around in the first couple of months [of implementation] has definitely died down," says Heather. "There hasn't been a flood of prosecutions. It hasn't had a big impact on responsible marketers."

CX is a broad umbrella

As noted, the dominance of GDPR meant the majority of other trends decreased in focus.

However, customer experience and marketing automation retained their high ranking in the Tracker in second and third place, with a score of 67% and 62% respectively. CX is firmly near the top of the list because ABM, predictive marketing and GDPR all fall under

its umbrella, says Jason Talbot, MD at The Crocodile.

"Customer data is the unifying factor on this trend list," explains Jason. "If you see CX at a strategic level, it's all about a single customer view and hyper-personalization." This ties into many of the trends topping the charts, he explains, which is why it's such a high priority for both agency and client-side marketers.

For The Crocodile, CX has been so essential to its strategy that the entire agency has reorganized around it. "In the past year we've implemented an agency-wide internal training program, initiated a new planning program that revolves around customer journey mapping and built our net-new strategic partnerships," says Jason.

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Highest climbers



See *The B2B mind*, page 34

It's a crucial trend; taking responsibility for CX is a way B2B marketing can increase its presence in the boardroom and add greater value to the business. The brands growing at speed are laser-focused on this and have it at their core, Jason explains. "It's no secret what's powering Netflix and Amazon, but the knack is how you do it and organize your business around it."

In B2B, it's tough to rely solely on the features of your products to create distinction. You need to think about what you're selling from the customer's point of view, Jason underlines. This means looking after customer retention, building advocacy and telling customer stories.

And this trend is not just for marketing, he says. "If you're going to put CX in your business, you've got to think about sales, customer service, and IT, as well as other departments. Marketers who embrace it, will get drawn into the bosom of the business."

The year ahead

This might be the year when AI, big data and predictive marketing come to the fore as marketers learn how to apply it to their businesses. While marketers currently give AI an average of 37% of their focus in 2019, this is expected to rise to 49% by 2020. Similarly, big data is predicted to jump from 48% (2019) to 58% (2020).

The Trend Tracker anticipates significantly more focus on the tech stack (50% in 2019 to 60% in 2020), driven by its growing importance to agencies. Clients are likely to drive intelligent technologies, with predictive marketing moving from 41% to 54% in importance.

Clients and agencies: A comparison

Although CX was deemed important for both clients and agencies, it was given a 10% higher focus by

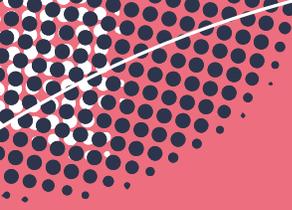
agencies than inhouse marketers. Furthermore, agencies rate emotional engagement, the tech stack, performance marketing and ABM more highly.

So how do we explain the variation between the two agendas?

Jason at The Crocodile is unsurprised these tactics are lower priorities for client-side marketers. "Agencies have a habit of bleating on about method, whereas clients are focused on growth and customer satisfaction," he explains. "Agencies don't necessarily speak directly to customer problems. It's just a language thing."

Clients often look to agencies to understand the developing trends and techniques. The trick is to find a balance between what is new and what is known to work.

In that case, it's no wonder that CX is pitted to be the top trend by 2020. "CX is the focus for us for the next five years," says Jason, "It's a movement, not a technique."



Section 3

Agency commentary

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Finding the right fit



Joshua Albert, VP, business development at Godfrey

Joshua Albert poses three questions clients should be asking when looking for a compatible agency

B2B is extremely complex. Being a part of the B2B industry involves large deals and buying teams, sales cycles that can be measured in years instead of months, and competitors that sometimes double as partners. Real B2B marketing is not for the faint of heart, but that doesn't mean you have to travel this road alone. Marketers need to find partners to support and extend their team. So, how can you ensure the agency you hire will deeply understand your business, industry and, most importantly, your customers?

Does the agency speak your customer's language?

Each industry has unique terminology. Look at the agency's blog, social channels and other sources of content. What are they writing about? Does it resonate with your business and its challenges?

Does the agency's knowledge allow them to go toe-to-toe with your product team? Could you confidently connect them to subject matter experts and know the agency is going to ask the right questions? Your agency should be able to sit down with product managers and get technical with them, by interviewing customers without sounding like an outsider, talking with sales about the challenges they face, and speaking to the executive team about the needs and challenges your customers face. And they should do it all through a lens that's unique to your industry and business.

Are they already active in your industry?

While trade shows and their importance vary by category, being present at key industry events is still essential. So much can be learned about customers by attending and interacting with other companies, attendees and industry influencers. When choosing an agency, ask which key events they attended in recent years and what they learned about the industry.

To go one step further, ask the agency if they're speaking at relevant industry events. Ask your media reps, editors and other industry contacts if they're familiar with the agency as well. For instance, most of our clients market to engineers, and we regularly contribute to the leading media outlets in this space. If others see the agency as an authority in your industry, this is another good sign that they'll understand your customers.

Who are their other clients?

When you look at the agency's client list, does it resonate with you? Are they already working with your customers, partners or other companies in your industry? These are key to knowing whether the agency will truly connect with you and your audience in the long run. Sure, a great case study can draw you in and create excitement about the work they're capable of producing. But if the agency is not already working with other companies like your business, then it's possible they won't know your customers and may have a frustrating learning curve.

Each agency is unique, and so is each client. These three points aren't exhaustive by any means, but they can help you quickly determine whether you have the right agencies in the room — agencies that know your business, industry and customers.



The antidote to uncertainty in business decisions



Christoph Becker, global CEO and CCO, gyro

Christoph Becker explains why agencies should be prescribing confident optimism to prospect decision-makers

People are addicted to proof. We've created a culture in which the supply of evidence is limitless and unstoppable. It flows through us and around us, shaping and governing every choice we make.

We've now educated our guesses to the point that no one is happy to guess anymore. There's DNA sequencing to direct our healthcare decisions. We rely on the aggregated opinions of thousands to tell us what to eat, as real-time delivery trackers predict precisely when we can expect those meals to arrive. We even have apps to quantify and optimize the search for love.

Technology has brought us the affirmation and assurance we need – and now that we have it, we crave more of it, for everything.

It's a perfectly understandable desire. Who wouldn't want to dispel the cloud of uncertainty that would otherwise darken our every move? Especially in these times, when the dread of not knowing what comes next is so palpable in the worlds of politics, media and beyond.

In business too, the need to know for sure matters more than ever. Business buying decisions are uniquely intense, high risk, high cost, multi-year propositions. They're emotional in a way that buying an electric toothbrush, or a loaf of bakery bread, can never be. Business decisions are career-defining moments.

Adding to the complexity is the fact that these decisions are generally taken not by individuals, but by groups of five or more people.

It's crucial for B2B marketers to put themselves into the mindset of these decision-making teams. What's the group thinking? What troubles them? What are their

aspirations? What will give them the confidence to work with you and the optimism to dream of future success at the highest levels?

There are crucial moments in every relationship. At those moments, we need to feel something exceptional, fresh and new if we're to go to the next level.

Confident optimism happens when decision-makers not only feel solidly assured of a company's expertise, but also feel a strong sense of optimism about what this partner can do for their business.

There are four key builders of confident optimism:

1. Proof, proof and more proof: 70%¹ of decision-makers want to know a partner completely understands their needs. Some 69% want to learn and be inspired via thought leadership.
2. Friction without fear: The first moment of friction is when you really find out about a partner, according to 86% of decision-makers. Navigated correctly, this is a moment when the relationship can progress to the next level.
3. Connection to culture: 83% say company culture is among the most important attributes in selecting a partner.
4. Constant communication: When you go quiet, you create a hole in your relationship that worries fill. More than three-quarters of decision-makers strongly agree communication is the connective tissue of successful business relationships.

¹stats from *The Business Feeling Index: The Feelings that Move Business Forward* by FT Commercial Insight Group and gyro



To reality and beyond...

James Foulkes, director and co-founder, Kingpin

Artificial intelligence is breaking through the label of hype. So much so it's not just become a reality, but a standard. James Foulkes discusses the trajectory of AI's future

A lot has changed in 18 years. That's because we live in the digital time and space. What starts as an idea becomes a global reality in days rather than years.

For example, CNN took nine years before it went from the bedrooms of business hotels in the US to the launch of its international arm. Google achieved international the second it appeared in a browser.

More than a third stated the focus for their machine learning investments would be front-end sales and marketing efforts

So where does it go from here?

According to Gartner, conversational AI is at the "innovation trigger" of its hype cycle. It's early days but people are adopting it. This is backed up by a recent survey of enterprise IT leaders by CIO Crowd. When asked "Are you planning to deploy AI-powered 'intelligent' apps in your organization in the next 12 months?" more than a third of respondents stated the

focus for their machine learning investments would be front-end sales and marketing efforts.

That's because customers expect information at any time, on any device, in any place – and if you can't deliver it, your competitors can. In fact as one participant said: "Conversational engagement is where customer engagement is heading. It takes a while to train AI and you need to start now to be ahead of the curve."

Those in the B2B space will expect highly personalized experiences that can only be delivered at scale using AI as it's faster, and ultimately more accurate.

AI's place in B2B marketing

For B2B marketers that means better data. We can start to learn patterns of customer behavior in a way we never could before and start applying these learnings to content. We can, like social platforms do, start amending the information people see when they visit our sites, turning it from a generic overview of products and services to a personalized page that appeals to their interests.

We can also apply AI to customer journeys so we can understand behaviors to build a compelling case on who to call first – advanced lead scoring if you will. This hasn't gone unnoticed by vendors with everyone from CRM providers to automation tools now including AI as standard.

Organizations are embracing AI because they want more information. Customers want better integrations and brands want more accurate data. B2B marketers focus on information, customer experience and attribution – all of which can be improved with machine learning.

So don't run scared, embrace it. If you don't, your competitors will.

How to adapt marketing campaigns to the changing digital landscape



Ken Holmes, VP, interactions, Point To Point

Agencies and their clients must work together to continue to keep up in the ever-changing industry of digital marketing, with a strong focus on the customer journey and data, writes Ken Holmes

B2B marketing has seen simpler times – which isn't a bad thing. But today's digital landscape has changed everything. B2B customer behaviors – from how they understand and purchase products to how they evaluate and interact with a brand – have shifted how agencies employ marketing tactics to make a greater impact.

In supporting a client's digital evolution, the greatest influence an agency can have is to utilize exactly what their client does best. A strong agency will push companies to think bigger and create a unique experience for their client's target audience.

Reach goals with smart objectives

A digital strategy is no different than a traditional marketing strategy – a B2B company sets its goal, sets its target audience, and launches a campaign. The main difference when it comes to a digital campaign is the number of levers to pull is so much greater, including the high number of data inputs that are leveraged to measure success.

Primary and secondary goals are critical to a digital campaign's success. For example, primary goals may include how you grow your marketing campaign, track ROI, and earn more sales. Whereas your secondary goals might be understanding how you stack up against the competition through industry trend research. But it's important to remember, when it comes to your sales team, sales goals are not marketing goals, and the best path is to find middle ground for every objective.

The beauty of the customer journey

A customer journey is a beautiful thing. Ultimately, it means you understand the motivators that influence decision-making to help build a long-term relationship.

Putting yourself through an actual customer journey as you ideate your campaign will help you when considering your goals. What would be the ideal experience to get where you want your customer to go? Would it be one you'd want to take if you were the customer? Campaigns rarely create conversion through a single source. A customer journey is an intricate map that identifies the valuable insights about your customer that leads to conversion. Utilizing these multiple channels that work together make for a successful digital marketing campaign.

A customer journey is a beautiful thing. Ultimately, it means you understand the motivators that influence decision-making to help build a long-term relationship

Placing data first

Data informs your customer journey. This is the era of intelligence and the customer now expects as much. Starting with data gives companies and agencies the ability to use objective facts as leverage, and then use creative strategy to build upon that to tell a compelling story. From there, measured results show what you can learn from a campaign. Each campaign should be backed with actionable insight that was gained from the previous campaign, making your approach an evolution of knowledge.

Digital presence is no longer an option. It's a necessity to survive and grow. Success is not possible by using one marketing channel, so companies and agencies must work together to communicate the same message across all channels.



The death of ABM is near

Meredith Fuller, MD, Quarry

Meredith Fuller discusses how account-based marketing will disappear as it becomes an integrated part of B2B marketing

There are no more flat-screen TVs. They're just TVs and they're all flat. There are no more smartphones. They're just phones and they're all smart.

Soon there'll be no more ABM because all B2B marketing will be account-based.

You won't have ABM people or ABM budgets or ABM tools. They'll just be your people, your budget, and your tools, all aligned and focused where they make the greatest impact for your business.

This shift has already begun, particularly within enterprise B2B technology firms. It wasn't long ago that these firms were piloting ABM. Then they were sorting out how to scale.

Now, many of the B2B tech firms with which Quarry works are applying the tenets of ABM to all their demand-generation activities, decreasing waste and increasing relevance and effectiveness:

- › **No more mass marketing.** Anything short of crystal-clear targeting is a waste of money.
- › **No more focus on lead quantity.** Anything other than a relentless emphasis on lead quality is a waste of precious time.
- › **No more incongruent sales and marketing objectives and metrics.** Failure to think and operate as one team and to drive collectively toward shared goals wastes time, money, and squanders opportunities.

- › **No more 'one-size-fits-all' messaging or buyer journeys.** Customer and prospect expectations continue to rise, and nothing short of deep personalization will do.
- › **No more focus on asset-, activity-, or channel-level optimization.** The focus shifts to moving targeted accounts from where they are today to where you need them to be in the most efficient and effective way. It goes beyond multi-touch attribution into holistic account-based success metrics.

It's just smart marketing. Soon we'll look back in wonder that it was ever any other way.

You won't have ABM people or ABM budgets or ABM tools. They'll just be your people, your budget, and your tools, all aligned and focused where they make the greatest impact for your business



How to survive the evolution of demand generation



Dan Hansen, senior partner, Red House

The best way to increase your appeal is to narrow your focus, says Dan Hansen

Targeting a smaller target market may seem counterintuitive to some, but if you're marketing to every business in your industry, you're probably wasting a large portion of your budget. And if your analytics are good, I can probably tell you what portion you're wasting.

Demand generation as mass marketing

The notion that every company can use your product is about as conceivable as every person needing the same shampoo. There are choices in every market, and each choice suits a nuanced need of each buyer.

Many buyers have the same nuanced need, and as a result, you have a narrow market within a broader market. If you know which buyers are suited to the specific nuanced version of your solution, you will have narrowed your focus to only those companies that matter.

Demand generation as a way of thinking

The key to counter-intuitive thinking is understanding. Every brand has factors that defines its place in the market. One base factor is customer demographics or firmographics, traits that determine companies with similar needs.

Another factor may be profitability. Your most profitable customers may not be your biggest, but those in the mid-tier range. If you add that factor to your first level narrow market, the result is an even clearer – and more manageable – market.

Also, there are market-specific factors; hospital marketing could include bed count, OE, or even payer mix at the emergency department.

Applying personalization to demand generation

You can apply personalization to a vertical with 7000 prospects in it. If you do, however, your effort may not exceed dynamically adding their name to some emails or direct mail. If I apply my filters to determine who fits me best, I'm likely to see that prospect potential drop to a couple thousand.

Now I can tier those prospects and use gradual personalization to address them through an ABM hybrid model, or a pure-play content marketing effort.

I can do this because my audience has become more manageable, and I can be more responsive to their actions.

The notion that every company can use your product is about as conceivable as every person needing the same shampoo

Graduated personalization as a closer

True personalization, defined as content and copy targeted to a specific user with a specific role needing a specific benefit at a specific time, can now be achieved using a smaller prospect audience.

However, it may still be too large to be responsive, so you'll need a way to measure their proximity within the buying cycle – generally handled through behavioral scoring – and segment your prospects into more manageable groups, adding more personalization as they get closer to buying.

In this new marketing frontier, you need to connect accurately with the diverse audiences out there. Which means you need your spend to be successful, and the work you do to be successful.

Nothing counterintuitive about that.



Embrace the volatility of your customer's journey



Ted Kohlen, president, Retina

Ted Kohlen explains why recognizing the unpredictability of customer behavior means better personas and relevant content

Go to Google Images and type 'customer journey'. You'll see an amazing amount of design consistency with many images depicting the customer journey as a nice, neat sequential process.

In what world does any audience start at the beginning (for example, the awareness phase) and progress logically and uniformly through interest to consideration to purchase? It never ever happens.

Why? Because life doesn't work that way. Audiences are constantly bombarded with new information, contradicting information, social and personal influences, economic influences and other factors that throw the linear journey out of whack.

These influences cause audiences to leap forward or back on their journey or completely abandon their journey all together. Importantly, the journey does not unfold in the pre-defined steps articulated by so many agencies and consultancies.

Avoid behavioral red herrings

Successful marketers are the ones that embrace this volatility – recognize it as part of reality and use the tools available to them to work within this paradigm instead of against it (or ignoring it altogether).

If you have not investigated or invested in behavioral data, now is the time to look deeply. There are a number of technology tools out there that will enable you to access data and act intelligently in real time.

If your personas are spot-on, up to date and information-rich, you can create relevant messages

and content in advance and act 'on the fly'. There are tools and platforms available to tell you when you should send, what you should send and who you should send to.

So, stop programming your communications based on pre-defined business rules. Where's the logic in sending an email every five days or when someone clicks on a link or if they downloaded a piece of content. These are the wrong signals. They're red herrings.

And, importantly, do not assume that your targets are proceeding to the next step in the customer journey. They may be going to the step before or back to the beginning. It's important to capture this dynamism to provide even greater predictive intelligence on your customers.

Dynamic personas critical to success

As marketers we need basic demographic and firmographic information on our target audiences, but it's the personas that provide intelligence on the behavioral and attitudinal nuances of the target audience. And it's these nuances that can really help your brand break through the noise and deliver a truly meaningful message and experience.

Dynamic personas become the fuel for crafting your messaging, developing creative, selecting your media channels and significantly influencing the type of content you will and want to create.

The weakness with static personas is that they do not evolve as your audiences and market changes and matures. Over time, traditional personas become less of a utility and more space-suck on your hard drive.

Dynamic personas are designed to evolve as data is captured and turned into actionable intelligence. They become an 'always-on' tool for marketers, as well as incredibly powerful sales tools, customer service, product development and other internal constituents – all critical pieces to a successful customer journey.

Connecting the dots to deliver a seamless customer experience



Andrew Mahler, co-founder and CEO, The Mx Group

Andrew Mahler believes the lines of customer experience are continuing to progress. Here, he outlines how to maintain connections

The importance of customer experience may seem like old news, but marketers still struggle to address it. Winning the attention of B2B buyers depends on factors that continue to evolve, and this evolution impacts marketers and agencies alike.

Digitization has permanently changed what it takes to deliver effective sales and marketing. Whether it's due to the influx of B2C expectations, increased choice, or the influence of digital-native millennials, we've reached the inflection point. Deliver an exceptional experience from the prospect to the customer stage – or you'll get beat.

But what does it take to deliver an exceptional customer experience? First, it's important to define the experience's breadth. In the past, siloed teams volleyed back and forth from prospect to initial sale to customer retention. Now, with B2B consumers in control, we're not dealing with a prospect, buyer or customer at one point in time. Rather, we need to create a seamless experience across the entire journey, from awareness to purchase to on-boarding and expansion.

This experience includes easy-to-find information, intuitive experiences, quick access, self-service and relevant content. It's less about driving the sale and more about helping customers buy. So agencies need to surrender the old 'push' tactics and focus on strategies that pull customers in while still giving them control. To do this, agencies need to connect strategy and delivery more holistically.

Here are four key ways to create connections and deliver exceptional customer experiences:

1. Buyer-centric brands: In a customer-driven world, brand perception and awareness are still crucial. Since brands

are measured by how they live in customers' minds, it's up to us to create sophisticated and emotionally resonant brands that consistently deliver across content, employee interactions and product experiences.

2. Conversations via creative: With consumers delaying sales conversations or simply making self-service purchases, B2B marketing needs to replace sales conversations. That means listening to the customer and treating them as the hero. This requires buyer insights such as personas and journey maps, alongside a customer-centric approach.

3. Digital first (but not digital-only): B2B organizations must deliver world-class digital experiences that address B2C expectations. This involves personalized web experiences, digitally-optimized content, and apps that enable on-demand purchase. But digital transformation can't happen in a vacuum. It must align with offline, high-touch tactics (like telemarketing, in-person events, and direct mail) that cement sales and loyalty.

4. Optimized interactions: Since B2B buyers seek increased autonomy and anonymity, the ideal customer experience entices buyers to initiate conversations. Since fewer sales conversations are happening, it's important to make sure those that do occur are successful. This means making sure customer insights (i.e. contact data, online behaviors, and research findings) are accurate, accessible and actionable. We should be thinking beyond marketing to support sales and retention efforts. For example, contextual sales tools can ensure the efficacy of each connection by creating a consistent message and experience across the full lifecycle.

As more and more marketers see the need to deliver a truly connected, seamless customer experience, agency partners who can connect the dots will set themselves apart, improving efficiency and results.

How the integrated agency bounced back from the digital hype



Chris Eifert, principal, TriComB2B

Chris Eifert delves into how integrated agencies have adapted to changes in the market to reaffirm their place in B2B marketing

“The report of my death was an exaggeration.”
Mark Twain, June 2, 1897. *New York Journal*.
(see also: integrated, strategic B2B marketing agency, 2019)

Not long ago, you could find articles in most advertising journals about the impending demise of the integrated agency. The dawn of digital and the eruption of martech took the industry by storm. Specialist agencies with online skills and a keen understanding of data established a foothold, impressing client-side vice presidents and CMOs with their technical chops. The promise of efficient, economical marketing with a measurable ROI was upon us.

Specialized firms brought an intensity, spirit and savvy that were good for the industry. Consultancies swept in, creating new, formidable players. For large, integrated agencies, it was a wake-up call, one that many answered with strategic acquisitions to expand their proficiencies in digital. But for many small and mid-sized agencies, the course to future success was more adaptation than acquisition, adding key skillsets and forging marketing technology partnerships. Different? Yes. Dead? Not even close.

Through it all, the role of the integrated agency has been reaffirmed, with many of the biggest brands in B2B remaining committed to these strategic relationships. Why? Because marketing is still marketing, and the theorems that make integrated agencies important resources for B2B brands still hold true.

Message over medium

We now know business decisions are based on emotional factors. It's the story that matters over everything else.

The integrated marketing agency combines skilled creative and strategic resources to make meaningful and personal connections. A non-compelling story delivered across the sexiest, most novel digital channel won't engage. Digital and data sophistication can't deliver results without a true understanding of why customers engage and purchase.

Digital is not a strategy

That's right. Digital is a category of media used as part of a marketing strategy. Once everyone recovered from the 'everything has to be digital' hype, the importance of the strategic, integrated marketing firm reemerged. Content marketing without strategy just felt like a lot of content. Enterprise websites developed without a deep understanding of business objectives and audiences became six- and seven-figure money pits.

The integrated agency is adept at uncovering strategic insights that keep business objectives, strategies and tactics aligned. And what if the best channel for a campaign isn't digital? Enter the integrated firm with the resources to execute what's appropriate, not just what's trending.

Measurable doesn't mean effective

There are few things more distressing than auditing a marketing plan and uncovering a Cheesecake Factory menu of activity, designed to overwhelm executives with scores and metrics. Meanwhile, legitimate demand and sales engagement simply aren't happening.

The integrated marketing agency is resourced to be strategic in its assessment of tactics, simplifying and rebuilding a strategy that makes sense, not because we'll be able to measure outcomes, but because it will produce outcomes. Customers aren't data points; no one understands that better than the integrated firm with a full complement of capabilities at its disposal.



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Godfrey

Philosophy

Ask any Godfrey person, and they'll tell you: We love marketing complex industries more than any other agency in the world. After all, complex industries make the world work better.

But, there's a problem. On the corporate side, B2B marketers have way more complexity than they know what to do with. They're constantly absorbing old roles and picking up new responsibilities. But their customers usually have it even worse. Every day, a new marketing trend springs up to solve this problem, but most marketers don't have the time to keep up. That's where Godfrey comes in.

We understand the client's industry, so we'll sync up with their team right away. And that ever-changing toolbox of marketing practices? We get that, too. Through this, we can engineer an experience that feels just right for each and every customer while filling that experience with stories that really mean something in their complex industrial space.

We get the complexity we love, our clients get the extended team they need and customers get a simple experience that leads them straight to the client's brand.

Awards

Chief Marketer 200

Perfect partner award

Fearless 50 Marketers

Worldwide Partners

Clients

› Avantor

› Brooks Instrument

› JLG Industries

› Johnson Controls

› SKF

› Solenis

Sectors



Industrial, manufacturing and engineering



Property and construction



Pharmaceuticals and life sciences

Year founded:
1947

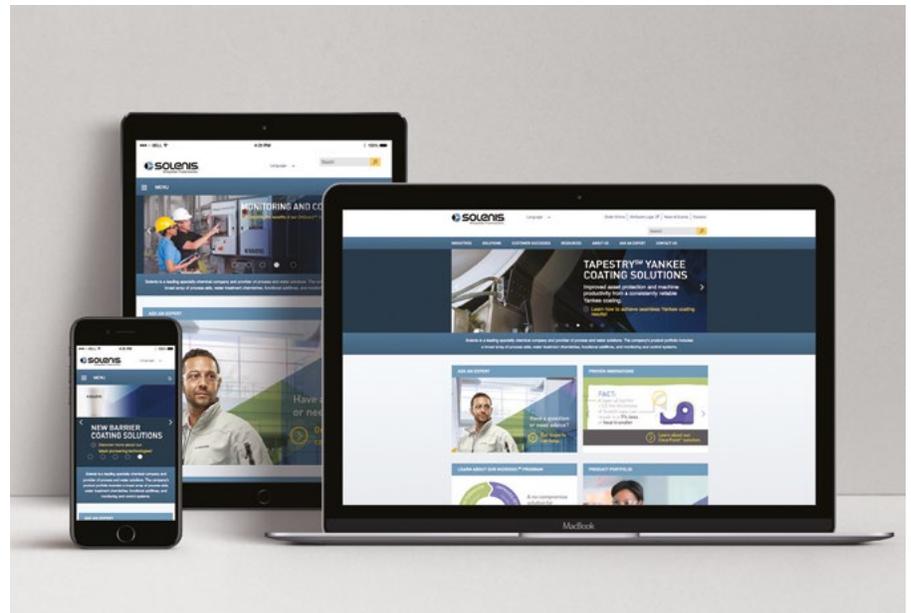
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Here's our secret: We love this stuff. We're so fascinated by complex industries that we'll never stop exploring new ways to engage the people who make up that world.

gyro

Philosophy

- › gyro is the world's first and only full-service, global B2B powerhouse. We are 700 minds spread across five continents, acting as one. We exist to help B2B brands develop deeper, more meaningful relationships, with the people who matter most.
- › As Dentsu Aegis Network's flagship B2B network brand, gyro is the only agency that offers the total integration of creative, media, data and technology solutions for B2B marketers.
- › gyro provides a range of services that enable our clients to achieve business results by leveraging our experienced team of specialists for capabilities including; brand storytelling, communications planning, creative development, sales support, lead generation, programmatic audience buying, content strategy, PR/social media, account-based marketing (ABM), customer experience (CX) design, SEO/SEM, brand-to-demand, media planning and buying.
- › Today's brands need cut-through insights and help navigating digital disruption. The addition of B2B International, the world's most experienced B2B market research company, enhances gyro's ability to offer a genuine end-to-end solution for our roster of clients.
- › Our mission is to create ideas that are humanly relevant.

Awards

Global B2B agency of the year	ANA (2018)
#1 US B2B Agency	B2B Marketing US Agencies Benchmarking Report 2018
B2B Agency of the Year	Ad Age 2016

Clients

› American Express	› Grant Thornton	› Roche
› Fujifilm	› HP	› Transamerica

Sectors

 Industrial, manufacturing and engineering	 Professional services
 Pharmaceuticals and life sciences	 Technology and telecomms

Year founded:
2009

Website:
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New York, 10006

Women vs. the glass ceiling

Glass is strong.
 Women are strong.
 Glass is hard and inflexible.
 Women are flexible and highly adaptive.
 Glass is cold and unmoving.
 Women aren't.
 Glass is made of sand.
 Contrary to popular belief, women aren't made of sugar and spice, they're made of courage.
 Glass breaks.
 Women don't.
 Which is why women are so good at business.
 Whether it's small business or big business, the glass ceiling's days are numbered.
 Because when you approach the seemingly impossible with courage, it becomes possible.

I mpossible

HISCOX
 encourage courage

SOMETIMES THE BEST MEDICINE OF ALL IS CALLED *Hope*

Make-A-Wish. #HopeIsMedicine

Make-A-Wish. It's not a last wish. It's a lasting wish. Because the majority of Make-A-Wish Children live beyond their illness. And often the wish is the turning point in their recovery. Refer a child and see how hope can make a difference. Ask a healthcare associate for information or visit ilinois.wish.org

MY CLEAR THE AIR COMMITMENT

Your commitment to **CLEAR THE AIR** starts with Neste MY Renewable Diesel™

What if you could reduce your fleet's environmental impact without impacting performance? Now you can. Neste MY Renewable Diesel™ is an entirely renewable and sustainable drop-in fuel that delivers performance superior to diesel. Join the movement and commit to clear the air at nesteMY.com

NESTE MY
 Renewable Diesel

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USG Structural Solutions

DO YOU KNOW WHAT'S HIDING IN YOUR FLOORS?

Discover a better alternative to poured concrete at usg.com/concretesubfloor

USG STRUCTURAL PANELS

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From top left, clockwise: Hiscox's "I'mpossible" ad in The New York Times for International Womens Day; Make-A-Wish print ads; Neste MY Renewable Diesel's Clear the Air campaign; Print ads for USG: Structural Panels print executions.



Iris Worldwide

Philosophy

Back in 1999, Iris was founded by a team of six people around a single client. Those six founders are still at the very heart of our business. Today, Iris is a thriving micro-network of over 1000 people in 14 locations across the globe. We deliver a multitude of fully integrated specialisms within creative, consulting, and digital to some of the most progressive clients around the world.

We are 'for the forward'. We are for likeminded, progressive individuals who are only interested in moving things forward. We are for brands and businesses that realize that maintaining the status quo is a dangerous thing to do. Our role in the agency marketplace has always been that of the bold challenger: we are here to help our clients find competitive advantage in the face of change and disruption.

We believe the participation era has arrived. We live in a world where brands no longer influence people. People do.

Our promise is that we will drive your business forward. Our diversity and depth of capability enables us to deliver three drivers of value that generate real progress for our clients. We create brands, products, propositions, experiences and services. We seek out and convert new customers at a price that drives the maximum margin for your business.

Awards

Innovation (Alight Mind Control Activation)

Brand Campaign (Otis Signature Service)

Brand Film (Collins Aerospace)

ANA B2 Awards

Summit Emerging Media Awards

Summit Emerging Media Awards

Clients

› Abbott

› Hewlett Packard Enterprise

› Samsung

› Collins Aerospace

› Otis Elevator Co

› United Technologies

Sectors



Aerospace and defence



Technology and telecomms



Industrial and manufacturing



Property and construction

Year founded:
1999

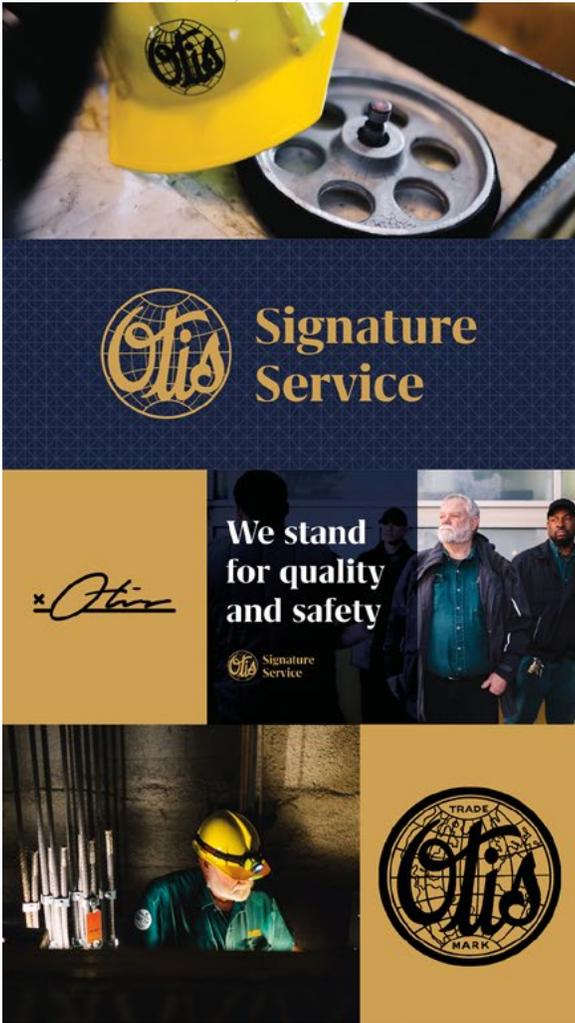
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iris-worldwide.com

Phone number:
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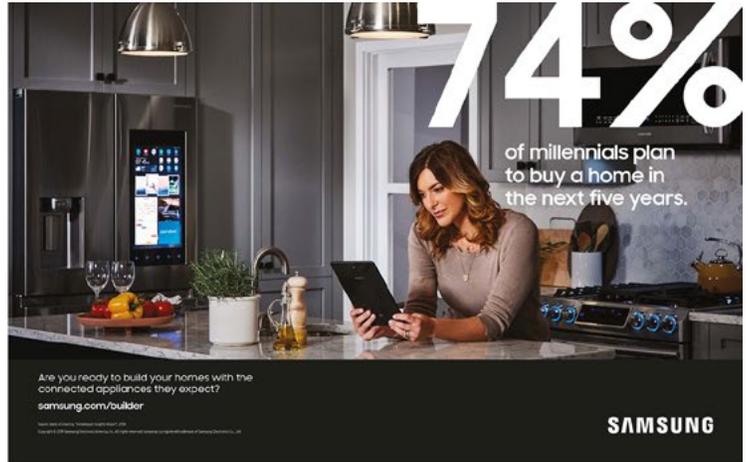
Contact email:
brennen.roberts@iris-worldwide.com

Twitter: @irisworldwide

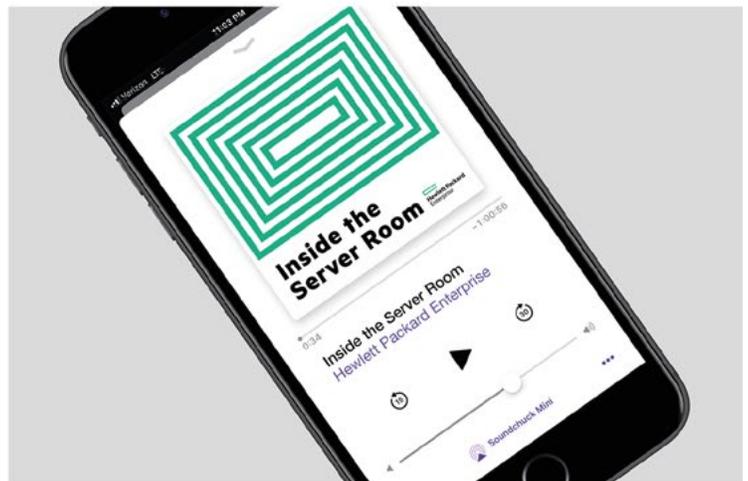
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Chicago, IL, 60602



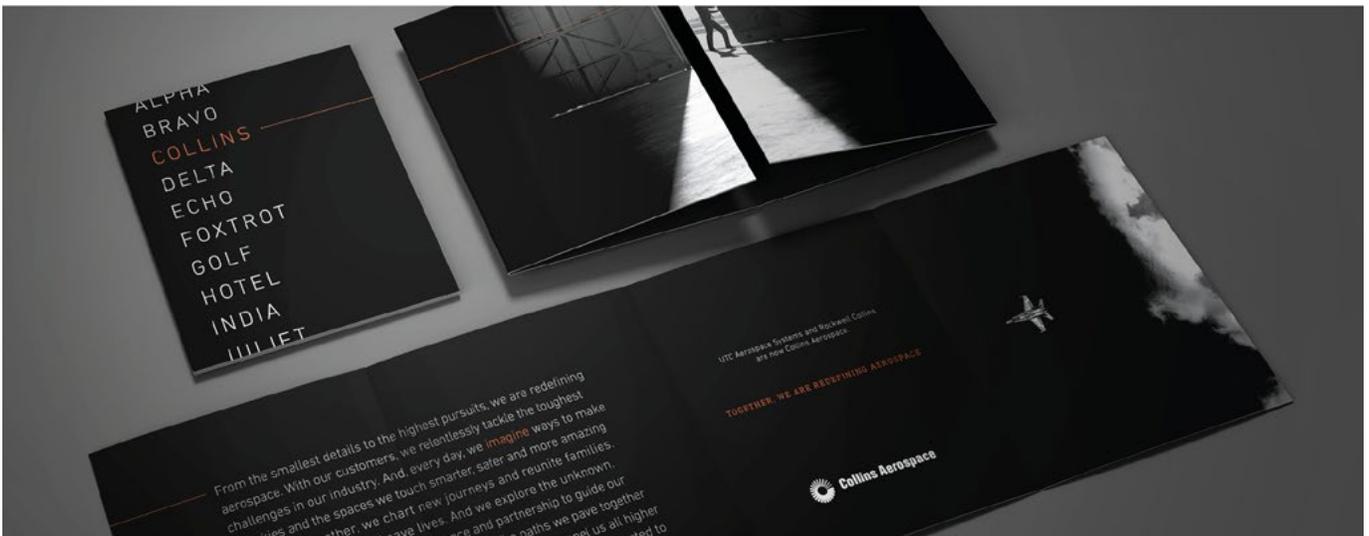
Re-invigorating the **Otis Signature Service** brand across social, sales enablement, and key brand assets



Targeting builders to outfit the homes and developments they build with revolutionary **Samsung** appliances



Helping **Hewlett Packard Enterprise** reseller partners shine through a unique podcast



Launching the re-brand campaign for **Collins Aerospace** via full-spread gatefold ads in key publications



Kingpin

Philosophy

The world of B2B marketing and sales is more complex and challenging than ever before.

A fast-moving, ever-evolving landscape of martech, adtech, data insights, bigger buying teams, increased content demands, shorter sales cycles, scoring, surge, intent, AI, ABM, GDPR, PECR, AR, VR, CIOs, generation X, Y and Z, lead flows, sales alignment, multi-touch attribution, ROI... aaaaand *breathe*.

Applying our 'audience first' philosophy, we use data and AI to challenge perceptions, create actionable insights and develop a robust understanding of how technology buyers behave either directly or through their channel partners.

We turn those insights into marketing communications that identify, engage, nurture and convert audiences into customers by positioning your brand with the right message, in the right environment, at the right moment for them.

Whether it's through ABM, social, search, content, webinars, conferences, telemarketing or any other channel or tactic – what matters most to us is that every action is backed up by relevant and accurate insights that connect the dots and generate meaningful ROI.

Awards

Winner, Agency of the year

Computing's Tech Marketing and Innovation Awards

Winner, B2B agency of the year

The Drum

Top 200 marketing agencies in US

Chief marketer

Clients

› Microsoft

› One Identity

› SonicWall

› Moogsoft

› Quest Software

› ZoomInfo

Sectors



Media and marketing

Year founded:
1997

Website:
kingpincomms.com

Phone number:
415 793 8370

Contact email:
hello@kingpincomms.com

Twitter: @KingpinComms

Address:
650 California St, fl 7, San Francisco,
California, CA 94108



"Driving market growth and sales opportunities for Trend Micro"

2,900 sales ready leads

67,000 social interactions

89% reduction on CPC



"A multi-channel, multi-touchpoint campaign driving pipeline"

20x ROI on pipeline

5.5x ROI on revenue through media investment

(Initial targets were 9x and 3x)



The Security Intelligence Company

"Using data and content to create a parallel lead nurturing ecosystem"

20x 1,600 engaged & identified contacts

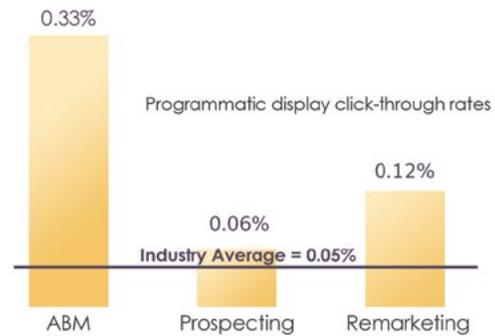
4,500 unique visitors



"ABM programmatic display campaign targeting key-accounts"

725% above the industry CTR benchmark

5 of top ten engaged companies from target account list



A selection of Kingpin's campaign results from 2018

Point To Point

Philosophy

Our philosophy is simple:

We unleash the power of digital marketing in B2B to turn indifference into engagement. Whatever we do for our clients, we make it easy, we keep it clear and we give it value. Balancing strategy and execution, our passion is deep-rooted when it comes to what we do, and it's evident through the longstanding success of our clients. We take the right people and the right process to make every interaction purposeful by combining analytics and creativity, validating everything we do with results. That's how we know it works.

We keep our audiences engaged. With us. With the work. With what matters.

Awards

Face-to-face marketing, virtual trade show, dealer, partner, or customer event

BMA B2 Awards
– Award of Excellence

Marketing activation
– brand relaunch

BMA B2 Awards
– Best of category

Brochures – multi-page

Print Excellence Awards
– Best of category

Clients

› Ferguson

› Loctite

› SharkBite

› Lixil

› OSI

› Sherwin-Williams

Sectors



Industrial, manufacturing and engineering



Property and construction



Media and marketing

Year founded:
1982

Website:
pointtopoint.com

Phone number:
216 831 4421

Contact email:
aweizer@pointtopoint.com

Twitter: @PointToPointInc

Address:
23240 Chagrin Blvd. Suite 200,
Beachwood, Ohio, 44122

LOCTITE



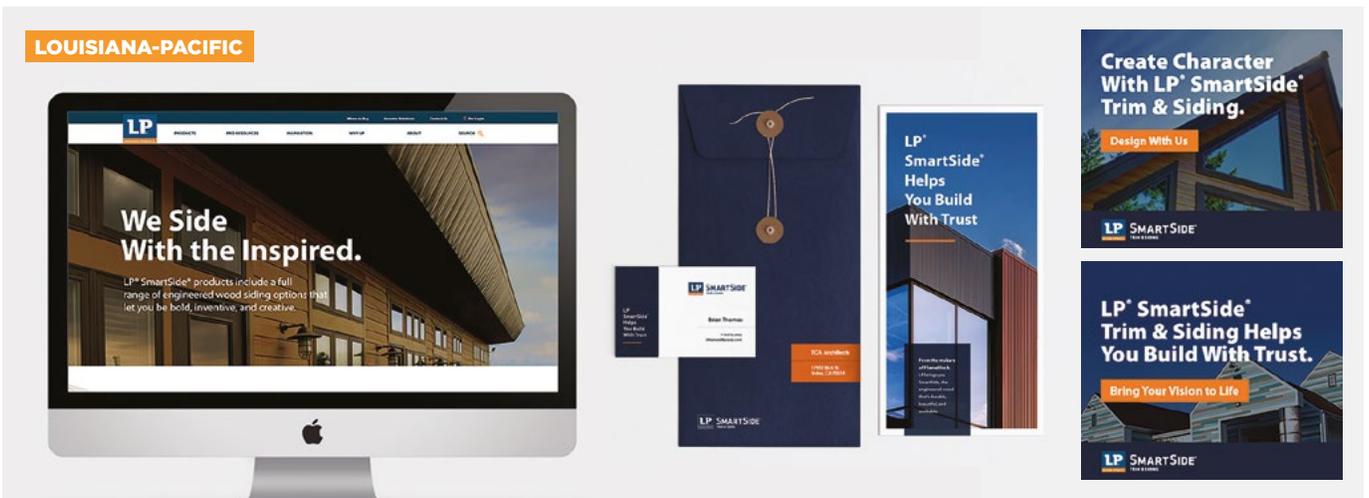
FERGUSON



AMERICAN STANDARD



LOUISIANA-PACIFIC



A selection of Point To Point campaigns from 2018

Quarry

Philosophy

Multiple voices. Opposing views. Mountains of information. Mounting regret.

The sheer number of obstacles facing today's B2B tech buyers have made buying journeys much tougher– and longer – than they should be. At Quarry, we're on a mission to change that. To create moments your buyers can't miss with momentum that won't stop. To Demand Reaction™.

Experts in demand and exclusive to B2B tech, Quarry sparks, enables, mobilizes and accelerates customer buying journeys. And we do it for leading enterprise marketers across North America.

Hire our top-ranking team of insight specialists, strategists, experience designers and marketing technologists when you need to:

- › Understand buyers and accounts.
- › Reframe the conversation.
- › Get into market.
- › Leverage modern martech.
- › Demonstrate performance.
- › Align sales and marketing.

Intrigued? Let's chat.

Awards

Finalist, Demand generation	ANA New York Global ACE Award 2017, 2018
Finalist, Small agency <\$25M	B2 Agency of the Year Award 2016, 2018
US B2B Top Shop in 2017	Chief Marketer

Clients

› Aruba Networks	› Equifax	› Windstream Enterprise
› Broadridge Financial	› Oracle	› Workfront

Sectors

 Financial services	 Professional services
 Industrial, manufacturing and engineering	 Technology and telecomms

Year founded:
1973

Website:
quarry.tech

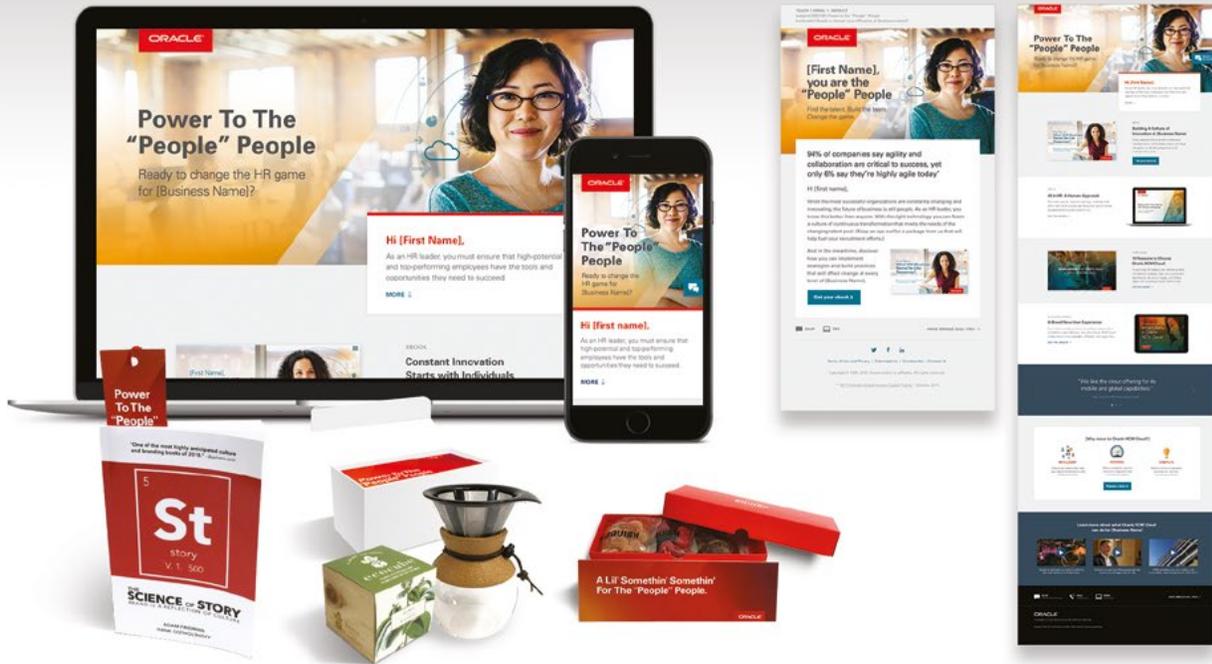
Phone number:
519 664 2999

Contact email:
hello@quarry.com

Twitter: @Quarry

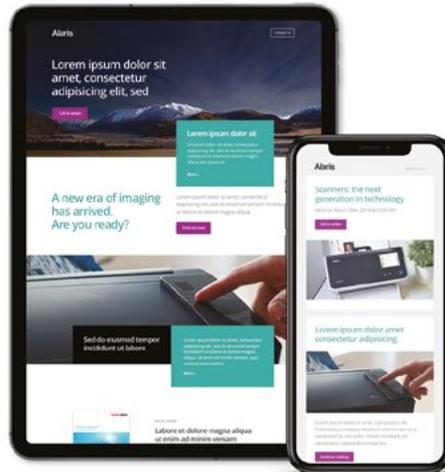
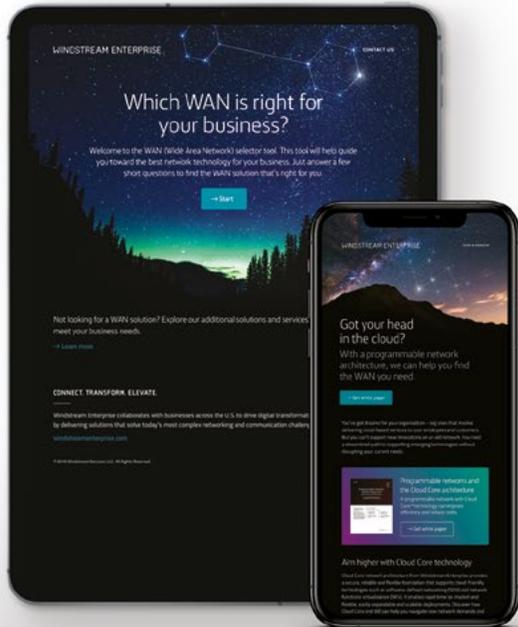
Address:
1440 King St North,
St Jacobs, ON, N0B 2N0

INTEGRATED ACCOUNT-BASED CAMPAIGNS



MARKETING AUTOMATION TEMPLATES

DEMAND & SALES ENABLEMENT



PERSONAS & JOURNEY MAPS



A selection of Quarry's campaigns from 2018

Red House

Philosophy

Red House was founded in 2001 to help B2B marketers achieve their goals through integrated marketing. Our namesake is an architectural landmark in London and one of the first homes designed around the needs of its occupants. To that end, we help our clients achieve specific goals based on their unique sales and marketing conditions.

We believe the solution to your marketing problem should be equally driven by strategy and creative, so we spend much of our energy understanding the buyer's mindset and customer-wants. Then we develop strong messaging and memorable, creative executions.

If your programs span multiple internal departments, we're comfortable collaborating across brand, corporate, product and field marketing, as well as sales and IT. We can develop the data strategy and technical requirements to ensure a seamless workflow, and we're experienced with industry standard CRM, marketing automation and analytics platforms.

Red House is a full-service firm offering solutions that include account-based marketing, content and digital marketing, as well as services such as analytics, automation, creative and website development. Our senior team has decades of experience in marketing, data strategy, technology and sales, and our vertical expertise includes financial, healthcare, manufacturing, mobility, supply chain and technology.

Awards

2019 Top B2B agencies	Chief Marketer
2019 Top demand generation agencies	Chief Marketer
2018 Agencies to watch	Medical Marketing and Media

Clients

› Bayer	› Elsevier	› Mayo Clinic
› Cognizant	› Leidos Health	› McKesson

Sectors

 Industrial, manufacturing, engineering	 Medical device and healthcare technology
 Information services	 Technology and telecomms

Year founded:
2001

Website:
redhouseb2b.com

Phone number:
770 475 2103

Contact email:
steve@redhouseusa.com

Twitter: @RedHouseUSA

Address:
11675 Rainwater Drive, Ste 175,
Alpharetta, Georgia, 30009

THE STATE OF HEALTHCARE ANALYTICS AND REVENUE CYCLE MANAGEMENT

A Research Study, Conducted by HFMA with Support from MedeAnalytics

"Analytics will be the truth serum... to show if the decisions we are making are helping or hurting our organization."

MedeAnalytics

invisalign go

Grow your practice with simple tooth movement.

Your patients are asking for better, brighter smiles. And they're asking for Invisalign clear aligners by name. Invisalign® Go treatment helps you offer more to your patients – and attract new ones.

See Invisalign Go >

medeanalytics.com

25th ANNIVERSARY MedeAnalytics

Why MedeAnalytics? | Platform | Solutions | Resources | Company

REQUEST DEMO Support Login

Make even smarter decisions

With unmatched technology and industry-pioneering expertise, MedeAnalytics offers solutions that unlock your data's true business value. We empower the entire healthcare ecosystem to make even smarter decisions in the clinical, financial, and operational areas that matter most.

LEARN MORE

MedeAnalytics Platform

Cognizant

socioeconomic markers

late actionable care gaps

MedeAnalytics research study: From infographics to whitepapers, Red House creates content that gets consumed; Invisalign Go email: We deliver integrated digital, social and behavioral campaigns that help you move the needle; MedeAnalytics website: Our team develops websites that are optimized for lead generation and integrate with your CRM, marketing automation and analytics platforms. Cognizant video: Our creative team can execute any form of video asset from live action to fully animated demos.

Retina

Philosophy

We have a vision for what ambitious and growth-minded marketers will need tomorrow. A vision for the strategic, technical and executional mandated by a rapidly changing world. A vision and practice that connects and integrates brilliant strategy, mind-changing creative and intelligent technological delivery.

Retina is driven by a single minded-belief – the opportunities that businesses need to capture today and expect to capture tomorrow are achieved by addressing any challenge holistically – through strategies that combine art and science, business and technology, creativity and accountability, software and data, intelligence and experience.

Headquartered in the San Francisco Bay Area, our impressive talent includes subject matter experts across digital automation, business intelligence, big data, artificial intelligence, brand and digital marketing. Our experts are around the globe in the US, Canada, the UK, Austria, Spain and Romania.

Awards

Inc. 5000 fastest growing companies

Marketing Tech Insights 'Top 10 Solution Providers'

Chief Marketer MARC Awards

Top agency for IBM Marketing Technologies – IBM Smarter Commerce Global Summit

Clients

› Cisco

› Flexport

› HP Enterprise

› Thermo Fisher Scientific

› US Department of State

› Vodafone

Sectors



Financial services



Government sector



Pharmaceuticals and life sciences



Technology and telecomms

Year founded:
2006

Website:
retinaagency.com

Phone number:
415 570 8468

Contact email:
ted.kohnen@transiris.com

Address:
555 Airport Blvd, Suite 325,
Burlingame, CA, 94010

Watson Marketing

4 Best Practices for Personalized Digital Marketing:

Innovative Ways to Get Ahead

IBM

Hewlett Packard Enterprise

HPE Boundaryless Blockchain Series

HPE is empowering Blockchain owners to break through boundaries by identifying common constraints and how to prevent or resolve them.



7 mission critical issues to know, now!

1. Transaction Rates



Blockchains can't handle high transaction rates. The fastest existing blockchain can handle about

500
transactions / sec

well below the level required for high-volume trading or payment systems.

However, newer blockchain platforms claim significant improvements through changes in the consensus mechanisms being deployed.

2. Performance



Sizing blockchain performance is difficult, which complicates hardware recommendations.



The performance of a blockchain is very sensitive to the **complexity of the smart contract or distributed application** being executed.

3. Platforms

At Retina, to be differentiated you have to be different. That's what we do. We use the term 'creative experience' to describe big, bold, powerful creative ideas that scale. Ideas that excite and, importantly, drive the actions you want your audiences to take.

The Mx Group

Philosophy

Addressing the complex challenges of B2B marketing has been our singular focus for the past 30 years, and there's never been a more exciting time than now. Digital transformation has forever changed how B2B buyers behave and what it takes to create impactful marketing. The organizations that will succeed in this evolution will need to deliver value throughout the entire B2B journey – from prospect to customer.

To accomplish this, we must harness the power of connections. Connecting buyer personas with website strategies. Connecting content marketing with lead management. Connecting marketing messages with sales enablement, and powerful creative with data-driven decision-making. These connections empower marketing to deliver significant impact to revenue and organizational growth.

We call this 'The Power of X.' The exponential transformation that results in connecting strategy, creative, demand generation and digital development.

Everything we do is aligned around one goal: creating solutions for our clients that propel their buyers and businesses forward. Many of our client relationships span more than 15 years – that's a clear reminder of the power of connections.

We look forward to building on 'The Power of X' and continuing to make powerful B2B connections.

Awards

Sales enablement

Website design and development

Best mobile app finalist

Killer Content Awards

Webby Awards – Web Marketing Association

Content Marketing Awards

Clients

› Atlas Copco

› Cox Automotive

› Siemens

› Tempur Sealy

› US Cellular

› Zekelman Industries

Sectors



Hospitality



Oil and gas



Industrial, manufacturing and engineering



Technology and telecomms

Year founded:
1989

Website:
themxgroup.com

Phone number:
800 827 0170

Contact email:
pete.wroblewski@themxgroup.com

Twitter: @MxGroup

Address:
7020 High Grove Blvd.
Burr Ridge, IL, 60527



Direct Mail

“Their in-depth knowledge in every industry in which they operate is unparalleled, and for us it’s meant greater results.”

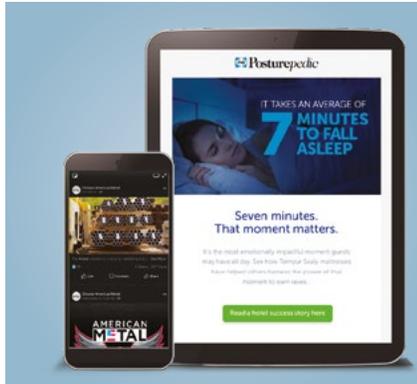
Greg Cremeans
VP, National Accounts
Tempur Sealy



Mobile and Web Apps



Print



Social Media Email



Event Marketing



Website Design and Development



Sales Tools



Video



The Mx Group

Strategy | Demand | Creative | Digital



Buyer Personas

The Mx Group is a full-service, award-winning B2B agency. Addressing the complex challenges of B2B marketing to drive revenue for clients has been our singular focus for the past 30 years

TriComB2B

Philosophy

We are B2B marketing. It's in our name and that's all we do. We've positioned the agency to focus on marketing technical products and services in the considered purchase space. It's a position that requires a "roll up your sleeves and figure it out" mentality, because our clients' offerings can be pretty high in complexity and seem pretty low in marketing sex appeal – at first glance.

At TriComB2B, an industry standard reads like a good novel. A 3D model is like a fine painting. Our staff of savvy creatives and industry veterans make their living communicating complex ideas with elegant simplicity, creativity and emotional inflection that connects with our customers' audiences.

Our key points of difference come down to this:

- › Strategy and technical competencies that allow us to "get it". We're not afraid of diving into complex challenges.
- › Industry experience that means minimal to no learning curve.
- › Business acumen that keeps clients in the know.

Our specialties include marketing and brand strategy, content marketing, integrated campaigns, public relations, video and animation, event marketing, and web and mobile app development.

Awards

Top 200 Agency 2019

Best in show, marketing:
Business-to-business

Best places to work

Chief Marketer

PRSA Diamond Awards

Dayton business journal

Clients

- › American Electric Power
- › Emerson
- › Flowserve
- › Honeywell Intelligrated
- › Regal Beloit
- › Stirling Ultracold

Sectors



Energy and utilities



Professional services



Industrial, manufacturing and engineering



Material handling

Year founded:
1984

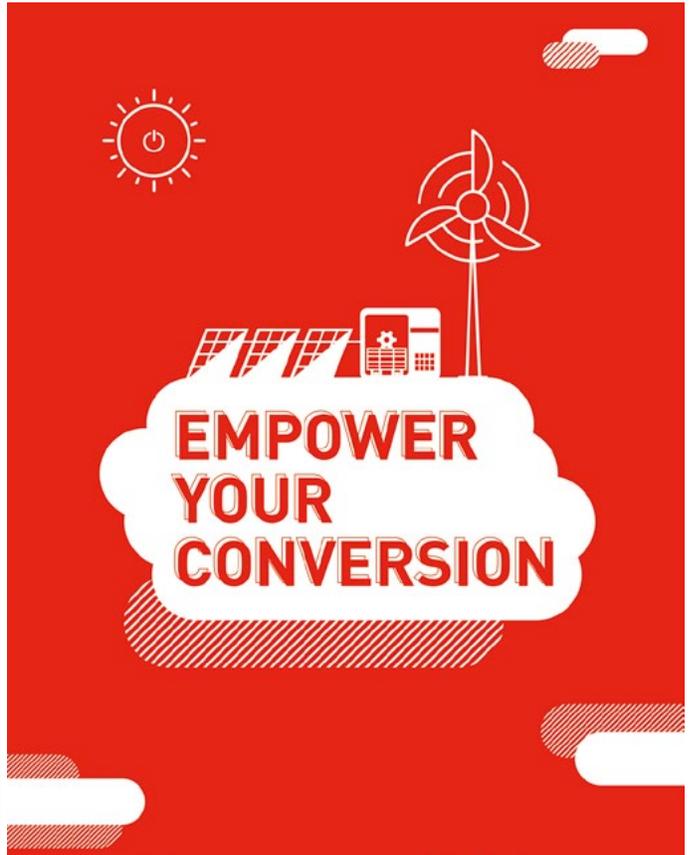
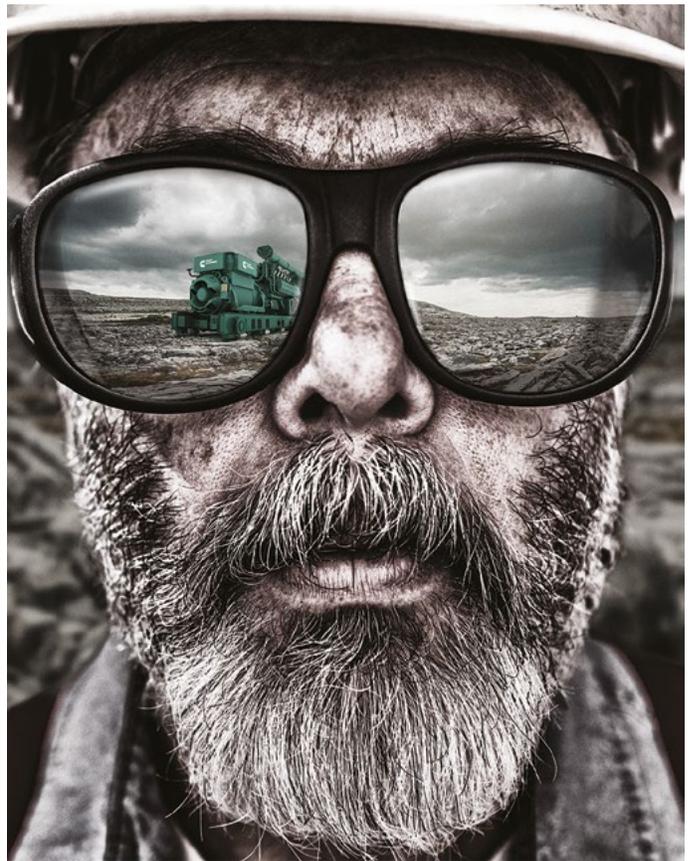
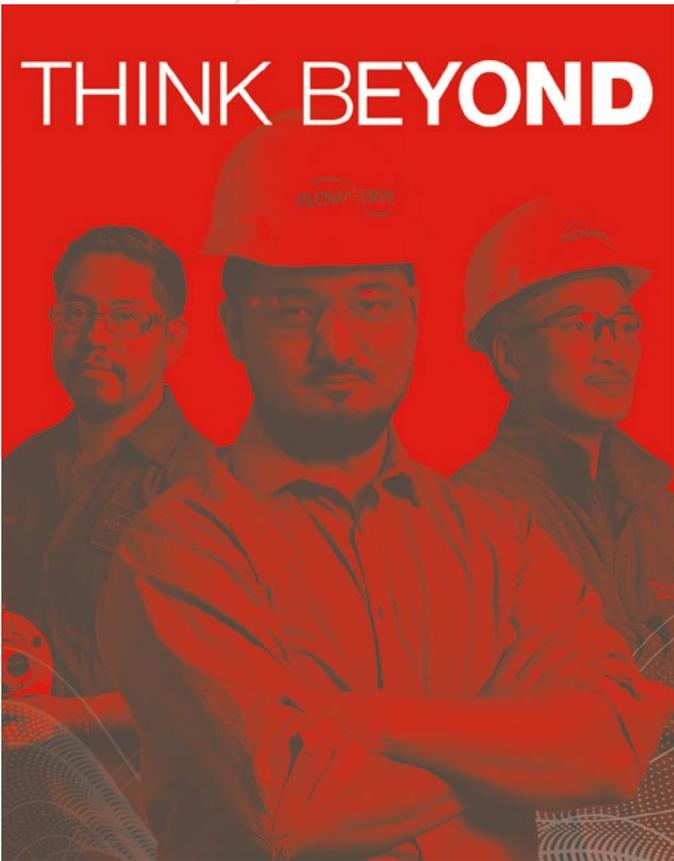
Website:
tricomb2b.com

Phone number:
937 890 5311

Contact email:
chris.eifert@tricomb2b.com

Twitter: @tricomb2b

Address:
109 N. Main Street, Suite 700,
Dayton, OH, 45402



Upper left: Flowserve – Think Beyond campaign. Upper right: Cummins – HSK78G product launch. Lower left: Honeywell Intelligated – The Connected DC campaign. Lower right: American Electric Power – electrification campaign.

Ready to win?

The B2B Marketing Awards 2019

This is an unmissable opportunity to celebrate your success, reward your team, and invite the clients you really want to impress, to the biggest B2B bash of the year.

Register your interest and be the first to find out the latest dates, tips on how to win an Award and much more.



#B2BAwards



B2B Marketing

Insight · Development · Training · Events

Section 5

Specialist expertise

	Godfrey	gyro	Iris Worldwide	Kingpin	Point To Point	Quarry	Red House	Retina	The Mx Group	TriComB2B
Account-based marketing (ABM)						✓				
Branding			✓							
Campaign and creative execution	✓	✓	✓		✓			✓		✓
Content marketing services (includes video)							✓		✓	✓
Data services (e.g. analytics, insight)				✓						
Demand generation (includes telemarketing)				✓		✓	✓		✓	
Digital (e.g. mobile, social media, SEO/PPC, web design/development, etc)	✓		✓		✓		✓		✓	✓
Marketing planning/strategy		✓		✓		✓		✓		
Martech (deployment and/or management)					✓			✓		
Media planning/buying		✓								
PR	✓									



About

B2B Marketing

With hundreds of thousands of users across the globe, we are the leading trusted voice at the centre of the B2B marketing community.

Established in 2004, with more than a million users of **B2B Marketing**, we are the foremost global information resource and advisor for B2B marketers.

Through our content hub and professional development services – including events, training and advisory – B2B Marketing users are empowered with the tools, insight and inspiration they need.

Our promise to you:

Things change fast in B2B. Just staying on top of the changes can be a full-time job. So, we do that job for you.

With our subscriber content, training and events we guarantee you'll:

- › Put your best-ever strategies in place.
- › Lock down the multiple skills, tools and insights you need.
- › Find real-world inspiration for rolling out some outstanding marketing initiatives.
- › Make the progress you've always wanted in putting marketing at the top table of your business.

B2B Agency Premium membership

Your annual Agency Premium membership brings you:

- › Two bound copies of the B2B Agencies Benchmarking Report
- › Our annual tech sector benchmarking report
- › Two copies of the award-winning B2B Marketing magazine, every quarter
- › Access to B2B Marketing magazine online.

Plus you'll receive:

- › Six new industry benchmarking/best practice reports per year.
- › Exclusive access to our complete Premium content hub of tactical guides and research.

To find out more about B2B Agency Premium membership or about anything else, please call our team on:

US: +1 312 371 2643

UK: +44 (0) 20 7014 4920

Or email: info@b2bmarketing.net

The B2B Marketing Agency Premium Plus membership programme

Our Agency Premium membership programme provides a unique resource for marketing agencies targeting the lucrative B2B sector.

The programme includes hard copies of the award-winning B2B Marketing magazine and the annual B2B Agencies Benchmarking Report, for client-impressing collateral.

The Agency Premium membership provides a gateway to unmissable networking opportunities with discounts across our annual events.

Your annual Agency Premium Plus membership brings you:

- ✓ 4 page showcase within the annual B2B Agencies Benchmarking Report.
- ✓ 12 month listing in the B2B Directory (online and in the quarterly B2B Marketing Magazine).
- ✓ Ability to upload 10 pieces of downloadable content to your Directory on b2bmarketing.net.

Your annual Agency Premium Plus membership brings you:

- ✓ Two bound copies of the B2B Agencies Benchmarking Report.
- ✓ Two copies of the award winning B2B Marketing magazine, per quarter.
- ✓ Access to the B2B Marketing magazine online.
- ✓ 15% discount on B2B Marketing events.
- ✓ Access to the latest exclusive reports, frameworks and templates, and our full member content archive.

Price: **\$3999 per year**

To find out more, call our client solutions team on
+44 (0)207 014 4920





B2B Marketing

Insight · Development · Training · Events

Contact us

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Clover House
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London
EC1R 3HN

US: +1 312 371 2643

UK: +44 (0) 20 7014 4920

info@b2bmarketing.net

b2bmarketing.net