



Your ultimate B2B campaign checklist

To help you build a winning B2B campaign, we've put together this simple, actionable checklist. Whether you're launching a new campaign or optimising an existing one, these steps will guide you from strategy to execution—ensuring you capture, engage, and convert the right leads.

Align sales and marketing

Ensure both teams are on the same page with shared goals and messaging.

Define your target audience

Know who it is you're targeting and why.

Use intent data to prioritise those with high-intent

Make sure you're only focusing on those most likely to convert

Segment your audience

Break down your leads by industry, role, or behaviour for more relevant outreach.

Set clear campaign objectives

Define specific, measurable goals for each campaign.

Plan your content strategy

Create content that educates, informs, or solves a problem for your audience.

Align content with buyer's journey

Create content tailored for awareness, consideration, and decision-making stages.

Choose your channels

Engage your audience through a variety (of relevant) channels, such as email, social, paid ads, and more.

Utilise marketing automation

Automate repetitive tasks to focus on high-value work and scale efficiently.

Personalise your messaging

Craft content that speaks directly to your audience's pain points and needs.

A/B test where you can

Experiment with subject lines, CTAs, and content formats to see what resonates.

Monitor performance

Don't 'set and forget' but keep an eye on your performance metrics.

Analyse and optimise

Regularly analyse your results and make improvements.

Establish a seamless sales handoff process

Coordinate with sales for smooth transitions when leads are ready to convert.

We listen, we understand, we deliver