

EBOOK

HOW TO CREATE AN EFFECTIVE B2B MARKETING STRATEGY

The 10 steps to build an effective
marketing strategy.



Step 1: Company Orientation

Strategy starts with orientation—but internal dynamics, a focus on sales, management or product can often point you in the wrong direction.

✗ Most Companies	✓ Customer-Oriented Companies
Talk about features	Focus on benefits to customers
Benchmark against “competitors”	Understand “alternatives”
Start with internal priorities	Unimportance in mind of customer
Push products and campaigns	Conduct market research
Focus on tactics and channels	Align around customer journey
Organize around teams or silos	Integrated approach to marketing

Market orientation or customer centricity helps us understand we are not the customer.

And only by conducting market research & understanding the customer can we make good decisions...



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Step 2: Market Research

Marketing without research is guessing. Research is how you turn the lights on—so you can see what customers actually think, want, and do.


Why it Matters

- Your instincts are biased
- Your team is too close
- Your competitors (probably) don't know either

Types of Research

 Quant — large-scale surveys (representative, statistically valid)

 Qual — interviews, focus groups (depth, nuance, emotion)

 Backward Research — start at the end. What information do you need?

Sample Size

- For quant surveys you need a representative sample size of your total addressable market (TAM)
- Googles Sample Size Calculator can provide you with the numbers you need

We start with what the customer needs and we work backwards.

Jeff Bezos




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Step 3: Segmentation



Not all customers are equal.

Segmentation helps you group the market into distinct, meaningful chunks—so you can focus on what (and who) matters most.

Why it Matters

- ✓ See how many customers are in each segment
- ✓ Spot spillover and influencer segments
- ✓ Identify which groups are profitable
- ✓ Understand what's actually achievable and within reach

Good Segmentation is

- Based on real behavior or needs
- Sizeable, distinct, and reachable
- Linked to buying decisions
- Actionable across your strategy

Bad Segmentation is

- Based on vague personas or clichés
- Too small to matter
- Built on surface-level demographics
- Can't guide what you do next

Segmentation isn't just slicing—it's prioritizing. Focus where you can win.



Step 4: Targeting



Targeting isn't about narrowing—it's about prioritizing. The best brands don't speak to a niche.

They speak to the whole market, just more strategically.

What is Sophisticated Mass Marketing?

- You aim to reach everyone in the category
- But you prioritize segments with higher value or influence
- You adapt messages—not the core brand—to fit different needs

Why it works

- ✓ Most customers are light buyers
- ✓ Big growth comes from broad reach
- ✓ Consistent brand + tailored relevance = scale and efficiency

Bad targeting looks like

- ✗ Over-narrow personas
- ✗ Chasing trends
- ✗ Talking to people just like you

Don't go narrow. Go wide—but smart.



Step 5: Positioning

Positioning is where you stand in the market—and in the customer's mind.

It's not just what you say.

It's what you mean to your customer, compared to everything else they could choose.

Great positioning sits at the intersection of:

- 🧠 Customer insight — What they want, need, and value
- 💪 Company strength — What you're great at (and can deliver)
- ⚔️ Competitive context — What others say, & how to stand apart

Why it matters:

- Gives your messaging clarity and consistency
- Aligns your team around what makes you different
- Shapes perception before a sales conversation even starts

If you don't position yourself, the market will do it for you...



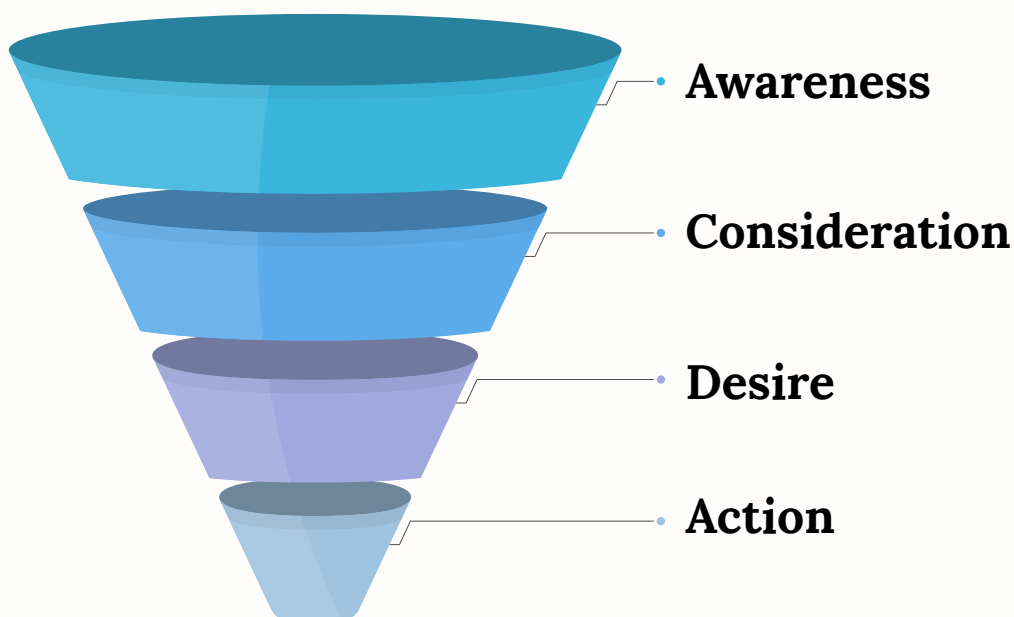
Step 6: Objectives

Strategy isn't about doing more. It's about deciding where to focus –and what success looks like.

Creating a custom funnel:

Funnels should be customised to your customer journey, each step from awareness to conversion and any post purchase events.

A generic marketing funnel, like the below, is only the starting point.



SMART Objectives:

- Balance long and short
- Align to your funnel and audience state
- Focus on what's achievable now without killing tomorrow's growth



Step 7: Product

With strategy in place, we turn to tactics—starting with the first P: Product.

Your product is your offer to the market. It needs to be clear, relevant, and focused.

Key product challenges:

- Are we solving the right problem for the customer?
- Is the product differentiated, or just adding noise?
- Are we extending it too far—or not far enough?
- Do we have too many products in play?

Strategic reminder:

The best products are simple, sharp, and shaped by customer needs—not internal politics or assumptions of customer needs.

Don't find customers for your products, find products for your customers.

Seth Godin



Step 8: Price

Pricing is a strategic choice.

Get it right, and you drive value.

Get it wrong, and you train customers to expect discounts which devalue your brand.

How to set prices:

There are 3 main approaches:

- 1 Cost-based — Cover costs + add margin
→ Easy, but ignores value perception
- 2 Competitor-based — Peg to the market
→ Keeps you in the pack, not ahead
- 3 Customer-based — Charge based on perceived value
→ Gold standard, harder to do but most profitable

Real world pricing challenges:

- Overusing promotions weakens your brand
- Sales teams often erode pricing in the field (discounting, bundling)
- Price integrity builds trust and long-term value

Price is what you pay. Value is what they feel.

Step 9: Promotion

Marketing communications = what you say, where you say it, and who hears it.

This is the Promotional P—but it's not just ads.

It's every touchpoint that carries your message.

Key principle: media neutrality

Don't assume one channel is best. Let your strategy decide the mix.

The optimum number of channels to promote on = 5

- 👉 Who are we targeting?
- 👉 What do they need to hear?
- 👉 When and where will it land?


Integrated > Fragmented

Your message should be consistent—across platforms, formats, and teams.

Great communication is orchestrated, not siloed.



Step 10: Place



“Place” is about distribution—where your product or service is available, how it's accessed, and who controls that path.

In service businesses, place means being visible, available, and easy to engage with—across the right mix of access points.

Key questions:

- Can customers find and book you online, in person, or both?
- Are you available in the channels your audience prefers?
- Are you working direct-to-client, through partners, or both?

Why it matters:

- Convenience drives action
- Channel fit builds trust
- Accessibility = opportunity



If your service is hard to find or buy, your strategy has already failed



Summary

Great marketing isn't magic. It's structure and consistency.



The Challenges:

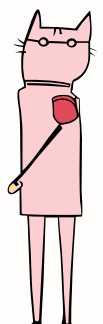
Strategy is just the beginning. Now you test, adapt, and stay consistent. Research shows:

📉 Stop marketing, and you shrink.

📈 Stay visible, and you grow.

Consistent, well-directed marketing outperforms bursts of activity.

The evidence is clear: brands that maintain presence grow—those that go dark fall behind.



About 5 Cats

At 5 Cats, I help B2B firms build marketing strategies that connect with their audience and build trust.

Effective marketing starts with understanding — your business, your customers, and what really drives decisions.

If this guide was helpful, I'd love to show you what a full, customer-centered strategy can do.

