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# 5 STEPS TO OPTIMISING YOUR 2024 BUDGET

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## Synopsis:

- Trends and projections of the 2024 B2B landscape
- What strategies and tactics to invest in for 2024
- How to implement effective frameworks to attract, motivate, and retain clients



Throughout this year, the B2B landscape has been and continues to be significantly affected by a series of major events. These include an economic downturn, banking failures, compromised supply chain security, and several other factors dubbed The Great Tech Stall by some. As a result of these developments, budgets have been reduced, digital transformation efforts have accelerated, and B2B buyer expectations continue to evolve.

In preparation for the changes that may accompany the year to come, organisations that proactively develop strong foundational strategies with the flexibility to adapt, will undoubtedly position themselves for success.

Nevertheless, the swift expansion of martech and the introduction of innovative marketing tactics and systems have left many organisations questioning the most efficient allocation of their budgets.

Given the challenges of reduced budgets and heightened client demands, it is imperative for leaders to allocate funds to technologies and strategies that effectively fulfill client requirements and ensure a favourable ROI. Indeed, [Gartner reported](#) the biggest driver of martech spending to be changing client behaviour (37%) and the advancing tech landscape (27%).

To help you achieve your performance goals next year, we have identified five critical steps for determining key areas for strategic spending to optimise your budget.



## 1

# IMPLEMENT FRAMEWORKS AND PROCESSES

Maximising revenue generation and enhancing the client experience have emerged as crucial factors for ensuring sustainable growth, and this trend is expected to persist in 2024.

To attain these objectives, businesses are actively exploring diverse strategies and frameworks, including revenue operations and [account based marketing \(ABM\)](#), among others. However, the feasibility and performance of these strategies can vary significantly based on the size and resources of the organisation.

**Below we explore why and how businesses should invest in these strategies while considering the nuances of implementation for different organization sizes.**



## Revenue Operations (RevOps)

### Why invest in RevOps?

**RevOps** is a strategic approach that aligns sales, marketing, and Client Success (CS) teams to drive revenue growth efficiently. It breaks down silos, streamlines processes, and enhances data visibility, leading to better decision making and improved client experiences. In fact, according to [2021 research by Forrester](#), companies that aligned people, processes, and technology across their sales and marketing teams achieved 36% more revenue growth and up to 28% more profitability. In addition, top B2B technology companies reported 100-200% increases in digital marketing ROI, 10-20% increases in sales productivity, and 30% reductions in GTM expenses ([Boston Consulting Group, 2020](#)).



## RevOps implementation by organisation size

	Small Organisation	Mid-sized Organisation	Large Organisation
TEAM	Foster a culture of communication between sales and marketing to ensure alignment.	Encourage regular sales, marketing, and CS team meetings to share insights and align strategies.	Form a specialised team to drive cross-functional alignment, tech implementation, and data analysis.
TECHNOLOGY	Utilise starter CRM and project management tools to centralise client information and facilitate smoother handoffs.	Invest in foundational technologies like CRM systems and basic marketing automation to improve data visibility and process efficiency.	Invest in advanced CRM systems, marketing automation tools, and analytics platforms to centralise data.
DATA	Focus on a few key metrics that provide actionable insights, such as lead-to-client conversion rates.	Leverage data to identify bottlenecks in the client journey and optimise processes.	Develop comprehensive dashboards and reporting mechanisms to monitor KPIs across the entire client journey.
ALIGNMENT	Embrace agility and adopt RevOps principles, prioritising collaboration and process improvements within available resources.	Define common KPIs that span different departments and teams, fostering a sense of shared responsibility for revenue outcomes.	Continuously train teams on RevOps principles, fostering a culture of collaboration and data-driven decision making.

## Account based marketing (ABM) and account based experience (ABX)

### Why invest in ABM?

ABM shifts the focus from broad lead generation to targeting specific high-value accounts. It focuses on enhancing personalisation and relationship-building, ultimately leading to higher conversion rates and larger deals.

84 %

of B2B marketers using ABM experienced pipeline growth

72 %

said that ABM delivers a higher ROI than other types of marketing

66 %

said that ABM is significantly improving marketing and sales alignment

Source:  
Momentum ITSMA, 2022

### ABM implementation by organisation size

#### Small Organisation

#### Mid-sized Organisation

#### Large Organisation

#### TARGETING

Choose a small set of must-win accounts with the highest potential impact.

Identify a manageable number of high-potential accounts based on their fit and buying intent.

Employ advanced segmentation techniques to identify high-value accounts.

#### CONTENT

Craft personalised messages for cadences suited to each target account, and across multiple channels.

Create content tailored to specific industries or segments, providing customised value to groups of similar accounts.

Invest in content creation to develop account-specific content that addresses unique pain points.

**ENGAGEMENT**

**Small Organisation**

While automation may be limited, engage with target accounts through personalised emails, phone calls, and tailored content.

**Mid-sized Organisation**

Utilise marketing automation tools to streamline outreach, delivering consistent messaging across multiple touchpoints.

**Large Organisation**

Execute omnichannel campaigns that combine digital advertising, email marketing, personalised direct mail, and social media engagement for a seamless buyer journey.

**OPTIMISATION**

Continuously refine your approach based on engagement data, feedback, and interactions.

Monitor engagement metrics like email open rates, website visits, and content downloads to gauge account interest and adjust strategies accordingly.

Leverage data analytics to track engagement and conversion rates for each target account, refining strategies based on real-time insights.

Reach your priority decision makers with precision company targeting and named account buyer engagement with our **ACCOUNT QUALIFIED DEMAND** with **INFUSE ABM FOCUS SOLUTION**

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# 2 ATTRACT PROSPECTIVE CLIENTS

## 88- Data orchestration 88- and privacy-focused marketing

**Data orchestration** and privacy-focused marketing are becoming increasingly crucial for businesses in the B2B space. Investing in these areas is not only a responsible approach but also a strategic one for staying competitive and maintaining client trust— a particularly valuable commodity in today's market.

The exponential growth in the volume of data and its complexity requires efficient management and data integration from each source to inform decision making. Indeed, 48% of organisations revealed that data accessibility was the greatest challenge to enabling high-quality and data-driven client experiences ([Precisely, 2022](#)). Consequently, organisations that implement data orchestration successfully, will have a significant advantage in 2024.

The increased popularity of privacy-focused marketing in recent months is driven by a growing awareness of data privacy concerns among consumers and the evolving regulatory landscape. In fact, according to the [2019 Consumer Privacy Survey](#), 48% of buyers indicated they already switched companies or providers because of their data policies or data sharing practices.

Adapting marketing strategies to meet privacy regulations and ensuring compliance with stringent data protection rules is therefore essential. **As a foundation, this should include:**

- 🔍 Auditing data handling processes
- 🔍 Updating transparent privacy policies
- 🔍 Implementing consent management systems
- 🔍 Utilising encryption
- 🔍 Ensuring access controls
- 🔍 Regularly audit security protocols
- 🔍 Creating an incident response plan

Leverage **INSIGHTS FROM CUSTOM, CATEGORY-FOCUSED AND INTERACTIVE SURVEYS** to identify your prospective buyers' priorities and challenges

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## Market segmentation, buyer personas, and ideal client profiles (ICPs)

In this dynamic landscape, ensuring accuracy through data-driven insights has never been more crucial. By investing in effective **market segmentation**, **buyer personas**, and ICPs, businesses can thrive by resonating with their audience on a deeper level to achieve sustainable growth. For example, marketing personas are proven to make websites 2-5 times more effective and easier to use by targeted users ([Hubspot, 2022](#)).

Utilising cutting-edge technology will be a critical strategy in the following year as tools such as Generative AI and Google Analytics 4 (GA4) enable businesses to create highly accurate and nuanced client segments. By analysing vast datasets, AI algorithms can identify hidden patterns and nuances that may be missed with traditional methods. This results in more granular market segments, enabling businesses to craft highly tailored marketing strategies that resonate with specific client groups.

**Kickstart your demand generation with focused top of funnel campaigns and targeted lead nurture with our LEAD GEN KICK STARTER with INFUSE LEAD CAPTURE SOLUTION**

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## Omnichannel marketing

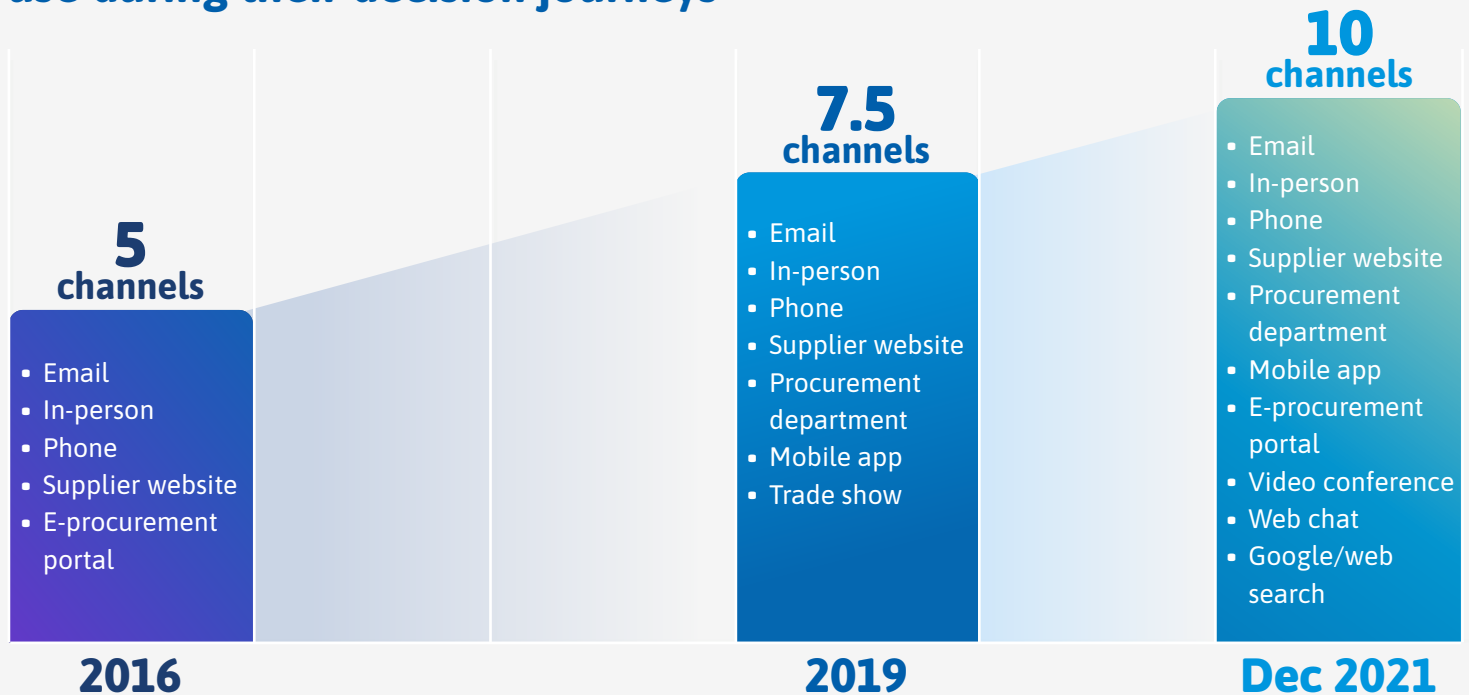
Investing in **omnichannel marketing** will be paramount in 2024 due to shifts in buyer behaviour and evolving expectations. Facilitating the buyer's journey now involves more channels than ever before, as prospective clients now regularly use ten or more channels to interact with suppliers (up from five in 2016) ([McKinsey, 2021](#)).

With consumers engaging across various devices and platforms, an omnichannel approach ensures seamless interactions and a consistent brand experience. This is a critical strategy as 73% of consumers value the ability to start on one channel and switch to another without starting over ([Zendesk, 2023](#)).

This strategy also harnesses the power of data-driven insights, enabling businesses to make informed decisions while refining campaigns to streamline their budget.



## Numbers of distinct channels that B2B customers use during their decision journeys



## 3 MOTIVATE PROSPECTIVE CLIENTS



### Client journey mapping and client experience (CX)

In 2024, prioritising investments in client journey mapping and client experience (CX) will be paramount for businesses aiming to remain competitive and meet buyer behaviour and demands. This is reflected by research which found that 64% of clients consider CX to be more important than price when making a purchase and that improved CX can increase company revenue by 10-15% ([Zippia, 2023](#)).

Several emerging trends further underscore the importance of these investments, including:

- The integration of predictive analytics and AI for crafting highly personalised experiences
- The adoption of immersive AR and VR technologies for heightened engagement
- The meticulous mapping of client journeys to ensure seamless interactions

By harnessing predictive analytics and AI, companies can gain a deeper understanding of client behaviour, deliver tailored recommendations, and proactively address needs, all of which significantly enhance the overall client experience.

**Generate and maintain decision maker engagement at all stages of the buyer's journey with our ACTIVE JOURNEY DEMAND with INFUSE LEAD CASCADE SOLUTION**

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## Content marketing and syndication

**Content marketing** and **syndication** remain priority investments due to their pivotal roles in enhancing brand visibility, engaging target audiences, and driving business growth. This is reflected by research which reported that 42% of B2B marketers have successfully generated sales and revenue with content marketing in the last 12 months, while 67% have successfully generated demand and leads ([Content Marketing Institute, 2023](#)).

In addition, [INFUSE Insights 2024 Voice of the Buyer research](#) indicated that 40% of B2B buyers consume an average of 4-6 pieces of content during the buying cycle, highlighting its role in the buyer's journey for informing purchases.

Diverse content formats will be a key trend, reflecting the growing demand for personalised and engaging content. To address this, companies should invest in a variety of content types to cater to different preferences and effectively capture and maintain their audience's attention.

Another crucial trend is the continued rise of voice search. Buyers increasingly use voice-activated devices and virtual assistants, making it imperative for businesses to optimise their content for natural language and long-tail keywords. Interactive content will also play a pivotal role in enhancing engagement. By offering content that actively involves users, such as polls, quizzes, and gamification, brands can create memorable interactions and strengthen their connection with audiences.

**Leverage custom-tailored and conversion-optimised content crafted by our team of industry experts to INFORM AND ENGAGE YOUR TARGET AUDIENCES with INFUSE CONTENT SERVICES**

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## SEO, paid search, and display advertising

In 2024, investing in SEO, paid search, and targeted **display advertising** remains imperative for businesses striving to maintain a competitive edge in the dynamic digital landscape. This is emphasised by a **Hubspot 2022 State of Inbound Marketing Trends report**, which showed that the top traffic source for all websites is organic search and that it was the second most effective channel, a trend that will continue in 2024.

The integration of cutting-edge technologies like machine learning and AI is reshaping these channels, ensuring they can adapt effectively to evolving search engine algorithms. Prioritising Expertise, Authority, and Trustworthiness (E-A-T) is vital for SEO success, as search engines continue to implement more stringent guidelines.

Moreover, targeting zero search volume keywords, harnessing the flexibility of dynamic creatives, leveraging the captivating potential of video content, and utilising the value of first-party data are essential strategies for staying ahead.

SEO secures organic visibility, paid search guarantees prime placements on Search Engine Results Pages (SERPs), and display advertising enhances brand recognition—in combination these initiatives align with emerging trends and evolving consumer behaviours, ensuring your digital marketing efforts remain effective.

## 4 RETAIN CLIENTS



### Agility, competitive displacement, and social listening

Investing in agility with competitive displacement and social listening will be paramount to navigating the ever-changing market dynamics and retaining clients as their needs change. In addition, social listening is the number one tactic used by marketers in B2B – no longer a B2C-only tactic – to gather insights on brand sentiment, which is vital to client retention (**Hubspot, 2023**).

**Competitive displacement** stands as a pivotal strategy for attaining an advantage in your market. Within the ever-evolving B2B landscape, emerging trends include data-driven competitor analysis combined with a client-centric approach, enabling companies to identify market gaps and outperform competitors.

The emphasis on sustainability and adherence to ESG (Environmental, Social, and Governance) principles continue to play a pivotal role, compelling businesses to invest in ethical and progressive practices while ensuring transparent reporting. Furthermore, innovating the client experience can swiftly highlight existing shortcomings in competitors' offerings to clients, improving client retention.

Social listening in 2024 will evolve with the trend of real-time optimisation through advanced tools and AI-driven insights and automation. Leveraging AI for sentiment analysis, chatbots, and predictive analytics will enable organisations to gather vital real-time data on client sentiment, industry trends, and competitor activities.

**Drive awareness, win competitive accounts, and increase market share by positioning your brand in front of competitor accounts and buyers with our MARKET DEMAND with INFUSE COMPETITIVE DISPLACEMENT**

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## Brand advocacy, testimonials, and case studies

In the coming year, longer sales cycles and brand scrutiny will remain a challenge for B2B marketers. This makes brand advocacy, testimonials, and case studies a priority. In fact, nearly 80% of B2B buyers said they referenced case studies as part of their buying research, and 42% of clients in both mid and late stages of the buying process find case studies valuable ([DemandGen, 2022](#)).

### Some additional upcoming trends to consider include:

- Building brand advocacy through client testimonials will gain momentum as authentic endorsements become more influential.
- Video testimonials are expected to rise, providing a more relatable way for prospects to connect with satisfied clients.
- Showcasing success stories will bolster credibility, with personalised case studies catering to specific client segments.
- Enhancing client retention through relatable case studies will continue to remind existing clients of the value you bring and foster long-term loyalty—as well as potential upsells.
- Interactive case studies and personalised content experiences will likely increase in popularity to engage audiences in refreshing ways.
- Emerging technologies like AI-driven personalisation, VR/AR, and perhaps even blockchain for authenticity will play a vital role in amplifying the impact of these strategies.

# 5 OPTIMISE AND ITERATE



## Intent, lead scoring, and qualification

As a staple in most modern marketing, allocating resources for **intent activation** in combination with lead scoring and qualification will remain imperative for businesses seeking to excel. According to a **forecast by Gartner**, 70% of B2B marketers were estimated to be utilising intent data in some capacity by the end of 2022. In addition, 38% of businesses surveyed experienced higher lead-to-opportunity conversion rates thanks to lead scoring (**Kentico, 2022**).

The emphasis on targeting specific accounts and greater volumes of intent data will increase as these strategies offer improved resource allocation by concentrating efforts on accounts with higher conversion potential, ensuring optimal utilisation of time and budget. Technology and software identifying account intent will also continue to improve, empowering organisations to pivot their strategies and campaigns with more recent or even 'live' updated information for optimal optimisation.

Additionally, fostering **alignment between sales and marketing teams** through shared lead scoring systems will be vital, while data-driven decision making and predictive lead scoring fueled by AI technologies will further differentiate businesses. The rise of ABX, heightened attention on marketing orchestration across all available channels, and the ongoing quest for higher conversion rates all underscore the continued relevance and significance of lead scoring and qualification in 2024.

Scale your demand generation efforts with qualified leads that exhibit in-market buying behaviours with our **TARGETED DEMAND GENERATION** with **INFUSE TRIPLE PLAY INTENT**.

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## Performance metrics and KPI tracking

In 2024, resource allocation in sophisticated performance and Key Performance Indicator (KPI) tracking remains crucial to ensure investments go further. 74% of B2B marketers set goals, but only 3% achieve them (**CoSchedule, 2022**). This underscores the significance of selecting the right Key Performance Indicators (KPIs) and utilising efficient tracking methods to analyse campaign performance.

With the updated **Google Analytics 4 (GA4)** making analytics more accessible, the rise of machine learning platforms facilitating predictive analytics, and the power of intersectional data for precise targeting, organisations have the potential to improve campaign agility, increase targeting accuracy, and pivot swiftly when necessary to secure outcomes.

Additionally, AI, first-party data, and the growing importance of client journey modeling underline the indispensability of robust performance metrics. The pivotal role that performance metrics and KPI tracking will play in guiding businesses toward success in the year ahead is also emphasised by **upcoming shifts toward:**

**Some additional upcoming trends to consider include:**

- Real-time analytics
- Predictive insights
- Privacy-compliant tracking
- Sustainability metrics
- Multichannel integration



# Key Takeaways

- Foundational frameworks and processes should align with the organisation's size and available resources to ensure success.
- In 2024, data management and security are vital for enabling precision targeting and driving growth as a result.
- CX is a priority investment that highlights the importance of omnichannel marketing for adapting to changing buyer behaviour and data-driven decision-making.
- Invest in diverse content, voice search optimisation, and interactive formats.
- In Q1 2024, businesses should emphasise agility, competitive displacement, and social listening, leveraging AI for real-time client sentiment and industry trend insights.
- Invest in intent, lead scoring, and qualification for resource efficiency and optimisation for future campaigns.
- Emphasise KPIs and performance metrics for campaign guidance to drive ROI and revenue.

Our INFUSE demand experts craft personalised demand programs specific to your target audiences and performance goals, including future-proofed strategies focused on ensuring outcomes and driving revenue.

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A HIGH-PERFORMANCE DEMAND STRATEGY AT SCALE →**



# INFUSE

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Salisbury House, 29 Finsbury Circus  
London EC2M 5SQ  
[info@infuse.com](mailto:info@infuse.com)

[INFUSE.com](https://infuse.com)