

# **HOW TO COLLABORATE TO DRIVE GROWTH:**

## **ALIGNING MEDIA PLANNERS AND OWNERS**



## Executive Summary

To drive sustainable growth, B2B agencies must bridge the gap between media planners and agency owners through structured collaboration and data-led strategies. This article outlines a practical framework for building high-performing, cross-functional teams that deliver measurable impact across campaigns.

- **Cross-team alignment increases campaign efficiency by integrating demand generation insights, analytics, and creative planning**
- **Regional and industry nuances—such as regulatory needs in healthcare or agile cycles in SaaS—require adaptive collaboration models**
- **Intent data, ABM strategies, and first-party data tools enhance targeting, improve ROI, and support GDPR compliance**
- **Best practices include structured feedback loops, shared dashboards, flexible delivery frameworks, and co-owned media planning sessions**

Explore the full framework to unlock regionally relevant, data-fuelled collaboration strategies that elevate agency profitability and precision.





### Important note:

**This article is recommended for marketing agency professionals operating within the EMEA region.**

For B2B marketing agency owners, a strong partnership with their media teams is not just beneficial, but a key driver of growth and profitability. When agencies and media teams align seamlessly, they unlock greater efficiency to elevate the impact of client campaigns.

Successful [demand generation](#) thrives on data-driven decision making and seamless collaboration to integrate insights into complex campaign strategies.

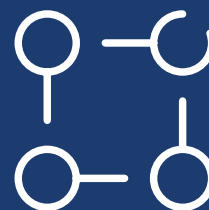
When media planners and owners work together, they ensure campaigns are not only creative, but also rooted in market intelligence, maximising [conversion](#) opportunities.

This high level of collaboration involves identifying shared goals and [leveraging data](#) to craft and execute media and [demand generation](#) strategies.

**This article presents a 4-step framework B2B media agencies can adopt to optimise campaign performance through collaborative planning and aligning cross-functional teams, adapting to regional dynamics, and tailoring strategies.**

**[Boost client lifetime value to drive revenue, retention, and growth](#) →**

## 4-step framework for B2B agency collaboration



Clear communication is the foundation of seamless collaboration, ensuring aligned goals, efficient workflows, and data-driven decision making.

**Below is a 4-step framework to improve communication and cohesion between teams:**



## Step 1: Collaborate on media planning

Unlock high-performing media campaigns by empowering cross-functional teams to collaborate on outcomes, not just tactics.

Effective collaboration is the cornerstone of high performing media strategies across the EMEA region. As agencies face increased pressure to deliver measurable results, aligning cross-functional teams—from sales and marketing to compliance and demand generation—has become a business imperative.

Below are several key factors that influence the effectiveness of collaboration.

### Internal collaboration

Agency owners can drive stronger campaign ROI by aligning internal teams through trust, visibility, and shared outcomes.

#### Best practices agency owners can adopt include:

- Defining outcomes, not tasks:** Focus on goals and KPIs to empower teams with autonomy
- Enabling visibility, not oversight:** Use shared dashboards to monitor progress without hovering
- Standardising frameworks, flex delivery:** Align on process but allow teams to choose their communication style
- Promoting peer learning:** Spotlight and scale successful cross-market practices.
- Leading with trust:** Create a safe environment for local teams to own decisions and innovate

Internal collaboration at B2B agencies also ensures that insights from all relevant departments—such as sales and marketing—are pooled together and aligned.

### Methods for implementing collaboration:

- **Conducting shared research:** Include sales and marketing teams in audience research meetings to gather comprehensive insights into buyer personas
- **Utilising data visualisation tools:** Platforms like Tableau or Power BI can help teams collectively analyse and understand audience data
- **Investing in collaboration tools:** Slack and Microsoft Teams enhance communication, offering integrated messaging, file sharing, and video conferencing to streamline team interactions

### ABM planning

Enhance ABM results by synchronising demand, sales, and media teams around intent signals and account intelligence.

Media budgets should be optimised to target key decision makers within specific accounts through programmatic advertising, intent-driven channels, and personalised content delivery. Sales teams can provide real-time insights into account behavior, while demand leaders use these insights to build tailored campaigns that align with the buyer's journey.

Leveraging shared data enables precise targeting, better resource allocation, and measurable pipeline impact. This integrated approach ensures media investments are focused, relevant, and directly tied to account engagement and conversion outcomes.

## Collaboration across industry verticals

Adapt your collaboration model to sector-specific regulations and buying behaviour for higher campaign relevance and compliance.

Examples of how nuanced collaboration can be across verticals:

Industry	Challenge	Collaboration style
Manufacturing	Long sales cycles, global reach, and complex decision making units	Agencies co-create educational, buyer-led content with clients to drive brand-to-demand experiences
Fintech	Regulatory compliance, data security, and financial literacy	Agencies work hand-in-hand with compliance and legal teams to approve content and messaging, using structured planning tools to map out multichannel campaigns that align with GDPR and MiFID II
SaaS	Competitive differentiation and rapid iteration	Agile collaboration through shared dashboards to optimise mid-campaign and dynamically reallocate spend
Healthcare	Regulatory scrutiny (HIPAA, EMA), buyer hesitation, and long review cycles	Multi-stakeholder planning involving client’s medical, legal, and compliance teams. Agencies adopt more structured and formalised workflows to secure approvals

In addition, collaboration preferences can vary across regions. For example:

- UK and Ireland:** In mature markets with strict budgeting, more structured collaboration is required
- DACH Region:** Regional regulations and data protection require highly formalised collaboration
- France:** Creative autonomy is valued, so a blend of structured and relationship-based collaboration is advised

Agencies that invest in shared insights, adaptive workflows, and cross-regional alignment are best positioned to deliver precision-targeted campaigns that resonate across verticals and markets.

[Discover more best practices for targeting buying groups and large accounts in our definitive guide](#) —>



## Step 2: Have consistent feedback loops

Create always-on feedback loops to optimise strategies in real time and foster transparent, high-trust collaboration.

This mitigates misunderstandings, reduces operational friction, and aligns all stakeholders toward shared goals.

### Method:

- 🔸 **Set the standard:** Define communication norms such as response times, shared objectives, and individual deliverables
- 🔸 **Book some time in everyone's calendar:** Establish recurring checkpoints to keep all team members updated and aligned



## Step 3: Integrate data and analytics

Maximise campaign precision by integrating data insights across teams—bridging client goals with performance metrics.

Media planners specialise in data-driven decision making and use analytics to track campaign performance, enabling them to make real-time adjustments. Integrating the owner's [client-centric](#) perspective into this process creates a comprehensive view of campaign effectiveness.

### Method:

- 🔸 **Seek alignment from the beginning:** Involve both owners and planners in early-stage discussions of campaigns to define creatives, target audience, key metrics, and goals
- 🔸 **Make data accessible for the entire team:** Platforms such as Looker Studio can help visualise analytics in a way that is accessible to all stakeholders
- 🔸 **Establish a skill-sharing routine:** Regular workshops or training sessions allow both parties to understand and appreciate each other's areas of expertise

### Important: Privacy-first media planning

Strengthen compliance and targeting accuracy by championing [first-party](#), consent-driven data strategies.

EMEA agencies operate under stringent data privacy regulations such as GDPR and the ePrivacy Directive, requiring media planners to adopt compliant, privacy-first strategies when collaborating across sales and demand generation teams.

By leveraging consented data collected through owned channels—such as websites, gated content, and CRM systems—planners can enrich audience insights and inform media buying decisions with accurate, lawful data.

**GDPR-compliant tools widely used in EMEA include:**

Type of tool	Name of solution	Source of first-party data
ABM and demand platforms	<ul style="list-style-type: none"><li>INFUSE</li><li>6sense</li><li>Demandbase</li><li>Leadfeeder</li></ul>	<ul style="list-style-type: none"><li>Website performance data</li><li>Engagement patterns</li><li>Account-level data</li><li>Opt-in consents and communication preferences</li><li>Intent and interest signals</li></ul>
Data and enrichment tools	<ul style="list-style-type: none"><li>HG Insights</li><li>Cognism</li><li>ZoomInfo (partially compliant)</li></ul>	<ul style="list-style-type: none"><li>Validated contact info</li><li>Firmographic data</li><li>Company updates</li></ul>
Business intelligence and analytics	<ul style="list-style-type: none"><li>Tableau</li><li>Power BI</li><li>Looker Studio</li><li>Qlik Sense</li><li>SAP Analytics Cloud</li><li>Klipfolio</li></ul>	<ul style="list-style-type: none"><li>CRM data</li><li>Website analytics</li><li>Sales data</li><li>Dashboard usage metrics</li><li>Marketing campaign data</li></ul>
Marketing automation and CRM	<ul style="list-style-type: none"><li>HubSpot</li><li>Salesforce Datorama</li><li>SAP Emarsys</li><li>Oracle Eloqua</li></ul>	<ul style="list-style-type: none"><li>Contact details from forms</li><li>Email engagement data</li><li>Campaign performance data</li><li>Communication history</li></ul>





## Step 4: Implement a shared campaign dashboard

Structured shared dashboards enhance collaboration and create the cornerstone for long-term B2B campaign alignment by promoting trust, clarity, and shared commitment to goals.

### Method:

**Utilise tracking tools:** Use platforms like Airtable to track real-time progress and performance metrics

It is important to note that collaboration styles and preferences can differ across regions.

According to the [6sense Buyer Experience 2024](#), media agency collaboration across EMEA is shaped by faster decision cycles averaging 10.2 months, a preference for buyer-led, self-paced engagement, and the need for culturally adapted communication.

EMEA marketers often favor structured, asynchronous formats like reports and email over real-time chats, especially when aligning with localised expectations.

### EMEA trends indicate:

**Northern Europe (e.g., Nordics, Germany):** Values precision, efficiency, and formality—favoring structured updates and clear deliverables

**Southern Europe (e.g., Spain, Italy):** Leans toward relationship-building, informal check-ins, and face-to-face (or at least video-based) interaction

**Middle East and Eastern Europe:** May favor hierarchical communication structures, where aligning with senior decision makers through formal reporting matters more

[Discover the strategies for transforming prospect data into measurable marketing wins](#) —>

## How to evaluate success and refine collaborative processes



Assessing collaboration outcomes is crucial for fueling continuous improvement and identifying critical optimisations to workflows.

**Implementing collaborative workflows improve operational efficiency in the following ways:**

- ▀ **Aligning teams with S.M.A.R.T goals:** Agency owners provide strategic vision and market insights, while media planners and creatives contribute with their expertise in execution and data analytics.
  - ▭ Creating shared S.M.A.R.T. goals can help to synchronise teams, driving higher efficiency, conversions, and ROI
- ▀ **Enhanced creativity and problem-solving:** Effective collaboration fosters innovation, turning complex objectives into creative campaigns that [resonate with target audiences](#)
- ▀ **Improved campaign efficiency:** Clear alignment and shared goals minimise miscommunication, reduce workflow friction, and support the optimisation of campaign performance through data-driven decisions
- ▀ **Boosted client ROI and trust:** Aligning creative and media planning ensures cohesive strategies that maximise audience engagement and drive [higher prospect conversion](#) for clients

## How can B2B agencies establish shared performance metrics for demand generation campaigns?

Collaborative media planning sets the stage for clearer goal-setting and [performance evaluation](#). By agreeing on KPIs upfront, all stakeholders remain aligned on campaign objectives.

It is imperative that agencies align their chosen metrics with client goals, ensuring they track KPIs that demonstrate success. In the case of demand generation, these should include outcomes such as prospect quality, cost per lead (CPL), and conversion rates, alongside traditional KPIs like CTR and CPC.

Last, but not least, create a single source of truth where all team members can access up-to-date performance data through a shared dashboard. Include qualitative feedback from sales and client-facing teams to complement quantitative metrics, ensuring a holistic view of campaign performance.

## Adapt based on results

Post-campaign reviews are opportunities to analyse what worked and what can be improved.

Scrutinising internal workflows and communication processes can uncover these opportunities for improvement and point to the root cause, informing corrective actions if a campaign underperforms.

**Below are 3 practical steps for evaluation:**

- 1. Conduct post-campaign analysis:** Hold meetings to review outcomes and identify lessons learned
- 2. Develop a feedback [survey](#):** Collect input from all team members to gauge satisfaction and identify improvement areas
- 3. Create a refinement plan:** Use findings to adjust collaboration processes and set new benchmarks for success

[Discover the strategies for transforming prospect data into measurable marketing wins](#) —>

## Key takeaways



- **Collaboration enhances creativity and precision:** Aligning agency owners, media planners, and creative teams fosters innovative solutions, blending strategic insights with execution expertise to craft campaigns that resonate and deliver measurable results
- **Streamlined workflows boost operational efficiency:** A collaborative approach reduces redundancies, ensures seamless communication, and optimises resource allocation, driving superior outcomes for both clients and the agency
- **Integrated data drives demand and performance:** Leveraging shared data and analytics ensures demand generation strategies are aligned with creative and media efforts, delivering campaigns that are both impactful and results-driven
- **Continuous improvement drives long-term success:** Establishing shared KPIs and conducting post-campaign evaluations are fundamental to refining collaborative processes, ensuring consistent improvement, enhanced ROI, and stronger client relationships

### UNLOCK YOUR AGENCY'S POTENTIAL WITH DATA-DRIVEN DEMAND

INFUSE demand experts help you design high performance programs that integrate collaboration and demand strategies, optimising key performance metrics like engagement, conversion rates, and ROI for your clients.

[Speak with the team to launch a demand generation strategy for your agency](#) →







---

2385 NW Executive Center Drive,  
Suite 100  
Boca Raton, FL 33431

[info@infuse.com](mailto:info@infuse.com)

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