Rethinking B2B Marketing

We must redesign orgs, reshape budgets, reevaluate vendors and tech, reskill teams, rethink strategy & tactics

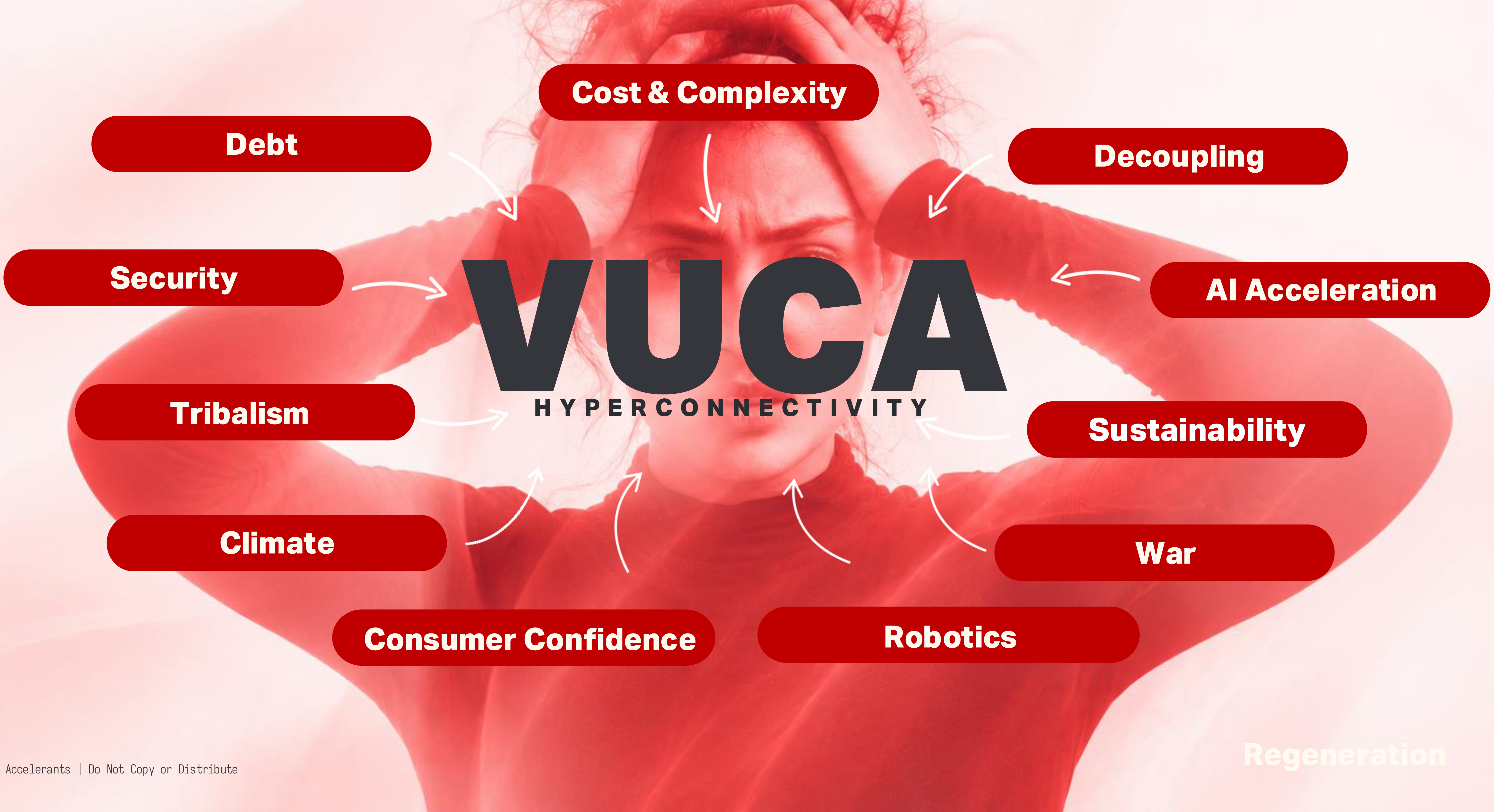
Andy Lark

Chair, Group Lark & The Accelerants
CCO, Nomni
NED, Advisor & Mentor
Adjunct Professor, Deakin University

andy@grouplark.com | andy@theaccelerants.co

@kiwilark   andylark

Volatility. Uncertainty. Change. Ambiguity



Tracking 68+ impact zones across marketing

Rich Personalization
Refined targeting, content and engagement via data.

Commercial Alignment
Continuing alignment of marketing to financial outcomes and practices.

Accountability
Ability to generate prove-able outcomes and measures that the business cares about.

New Consumer / Buyer
Race to address new buying and interaction patterns.

Strategic Relevance
From the 4ps to maybe one if we are lucky. Executors, not strategy drivers.

Commercial Orientation
Marketing's ability to earn a seat at the commercial table.

Social Commerce
New distribution channels and interaction points.

Media Shifts
Accelerating rise of video formats and podcasts. Last nail in legacy media

Pace of Change
Ability to keep pace with market change and drive the business to adapt to that pace.

Digital CX Shift
Web and digital interactions reimagined. AI automated digital experiences.

AI Visibility
Win presence in AI-generated buyer research. Machine readable brands.

New Buying Funnel
Shift to conversation and contact pools. Multitude of influencers.

AI/Digital Humans
Rise of brand bots and digital humans.

Instant Commerce
AI Feeds fuelling instant commerce with conversational context

MRM / Prediction Engines
Moments-based prediction engines and

AI Structure Impact
Capability enhancement coupled with Org design, strategy, & more

Data & Context
Data unlocked with cross-organizational context lakes

Budget Compression
Do more with less. AI cost savings. Reduced headcount.

Agentic Marketing
Entire marketing functions replaced by AI Agents and Operators

IM / UCG
Velocity of Influencer Marketing & UCG.

Brand License
Brand license to operate, better/unique/different. AI accelerates sameness and category blur.

Training & Development
Wildly underserved and undertrained.

Omni-Everything
Omni-Channel. Omni-Loyalty. Omni-Everything.

Trust as Infrastructure
In a world of synthetic content, fake reviews, AI spam and deepfakes, trust becomes a conversion layer.

Marketing Twins
Marketing Augmented with AI twins.

Talent Flattening
New sourcing, offshoring, new team working practices

Tokens
Reimagines cost, CX, supply chain, products, data and more.

1st Party Data & CDPs
CDP for 1st party data and data integration.

Voice & Visual & Chat
Voice & visual are how we interact - record and search.

AI Precision & Velocity
AI Will Supercharge Personalization, Margins, and Campaign Precision

Marketing Op Model
Smaller teams, AI orchestration& workflows. More hybrid roles> Agencies to internal AI-enabled teams.

Privacy & Security
New data strategies with privacy first and customer protected.

Loyalty Transformation
Owned currency, wallets, and precision targeting.

Systems of Engagement
Shift to SOEs over Systems of Record

AI Supply Chain
Precision inventory, cart, and supply chain optimization

Generative Marketing
AI driven content and interactions constantly created and evolving.

Regenerative Marketing
Marketing strategies for regeneration & sustainability

Dynamic Content
Short, UCG style content formats preferred. Higher authenticity.

Interactivity, AR, VR
From transmission to interaction - AI chat & & augmented reality.

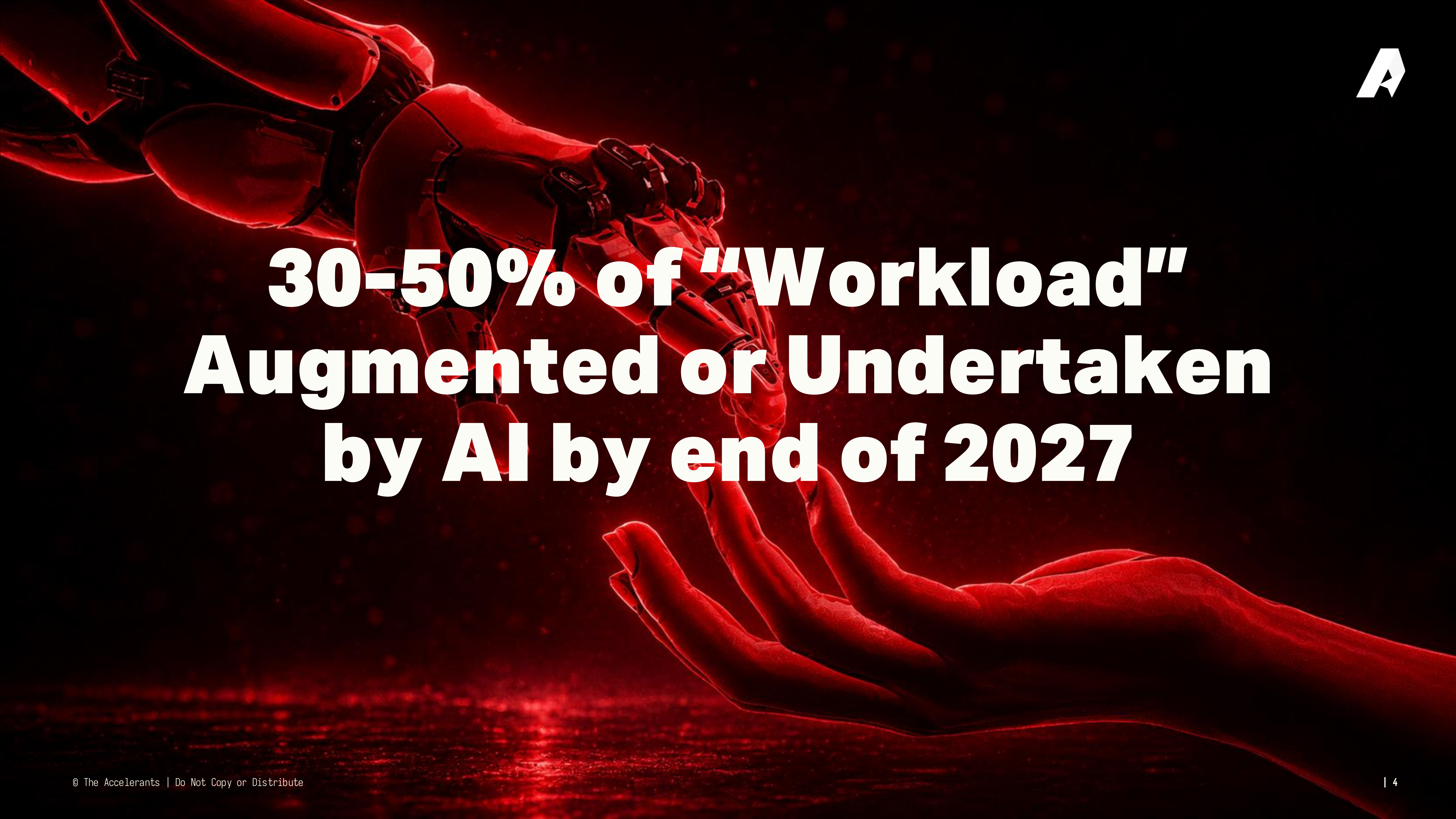
Neuro Marketing
Reading eye, voice and ambient signals.

Retail Media Shift
AI & Commerce platforms become media owners.

Strategy · Capability / Ops · CX / Commerce · AI / Tech / Data · Operations · Commercial · Media / Content

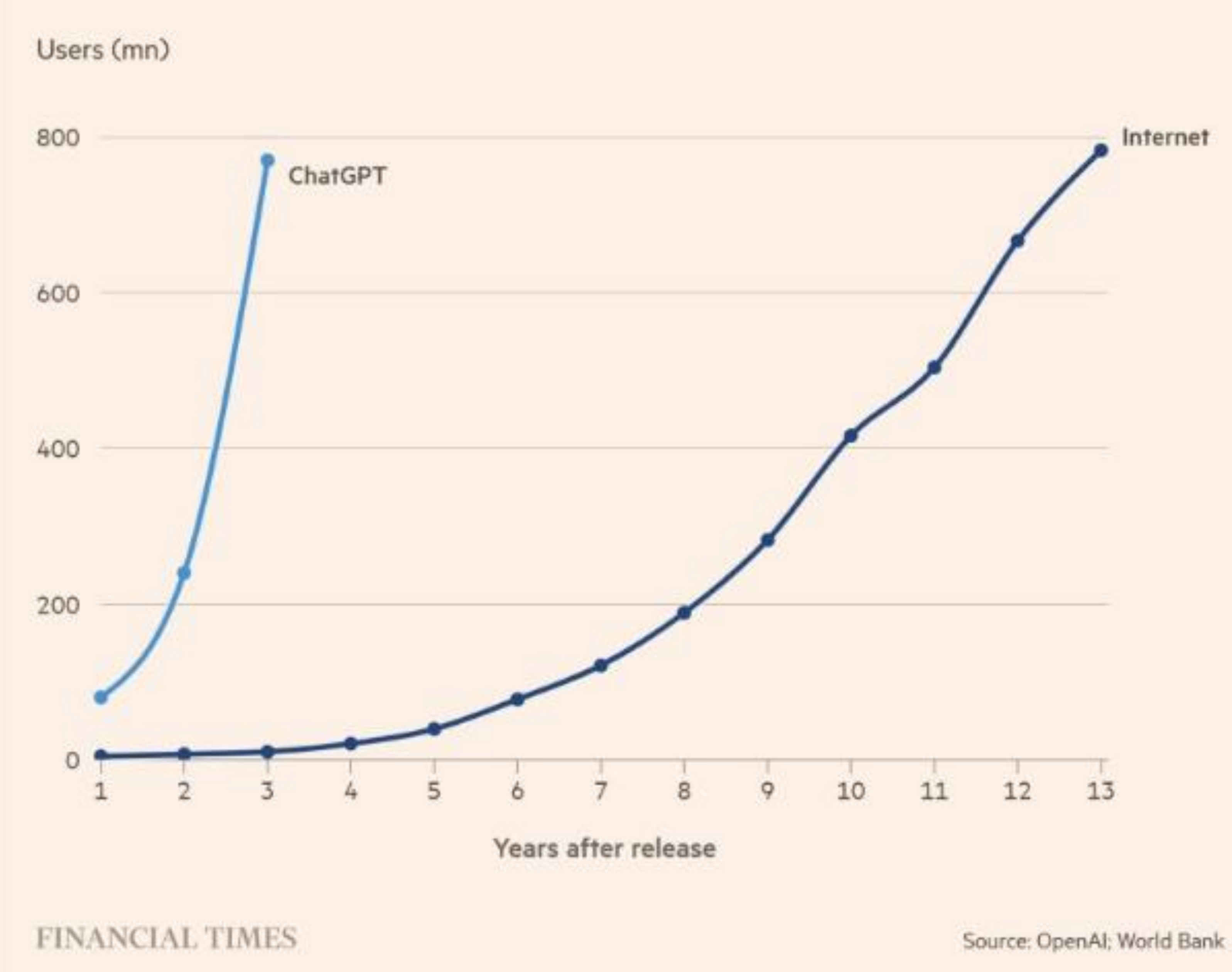
Impact on today's business & customer

Important: Shapes Marketing & Marketing Outcomes / Effectiveness



30-50% of “Workload” Augmented or Undertaken by AI by end of 2027

You don't have much time . . .



7 Internet years = 1 AI year

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Reboot Marketing

TAKEAWAY

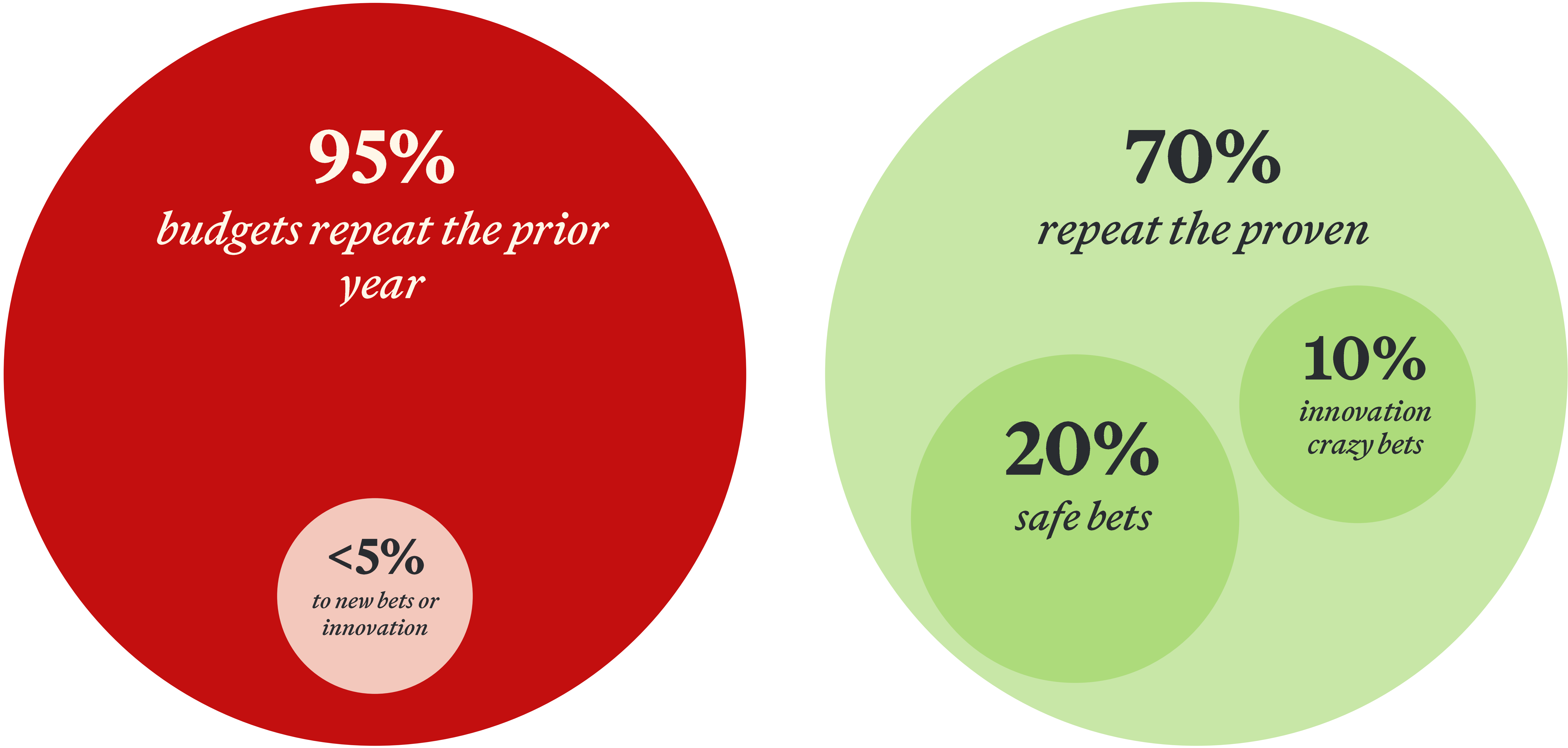
Shift to working on marketing, redesigning orgs, reshaping budgets, reevaluating vendors and tech, reskilling our teams

In

vs

On

Rinse & repeat or *refresh & renew*



We are in for a radical reshaping of marketing

PEOPLE	PROCESS	TECHNOLOGY
New AI-first org design	*AI-first process redesign*	*SaaS re-evaluated*
New resource requirement	*Agency Reappraisal*	*Ai-business Cases*
30% *yield*	**>40%** *yield*	**>20%** *yield*

Skill-up or out

Every employee has to be "L3" or they don't survive this era. Klaviyo defined levels of AI autonomy the way self-driving cars are defined.

- L1 is using AI to search.
- L2 is spinning up a session and running an agent.
- L3 is constantly running multiple sessions or a team of agents.

Everyone had to be L3 by the end of June, including PMs, designers, sales and marketing.

Andrew's Top Takeaways

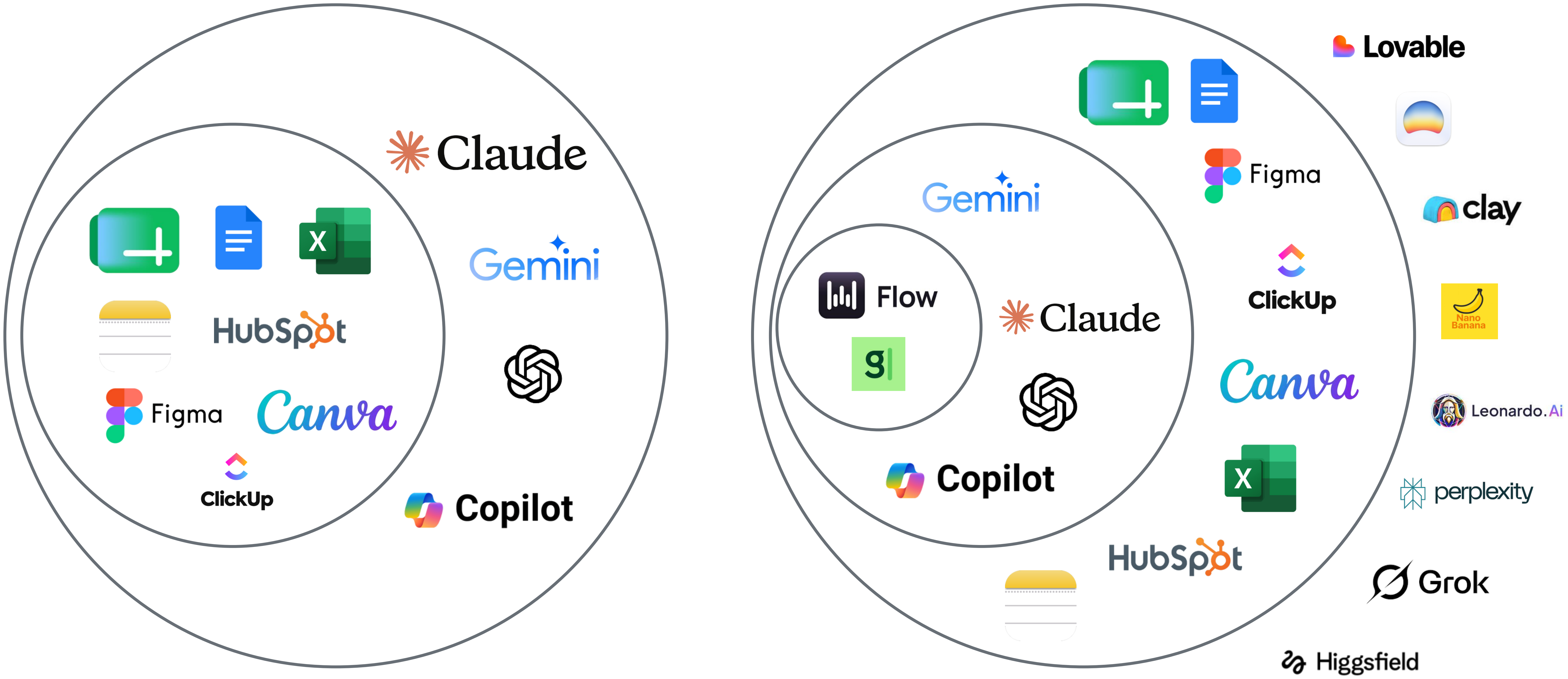
- **Every employee has to be "L3" or they don't survive this era.** Klaviyo defined levels of AI autonomy the way self-driving cars are defined. L1 is using AI to search. L2 is spinning up a session and running an agent. L3 is constantly running multiple sessions or a team of agents. Everyone had to be L3 by the end of June, including PMs, designers, sales and marketing. Everyone commits code, from Andrew down to the summer interns.
- **Use teams of agents to build your agents.** Klaviyo's internal system, "Dark Factory," takes a prompt, acts as the PM, writes the specs, decomposes the problem into engineering subsystems, writes contractual API interfaces between them, then runs subagents against each piece. It builds through the weekend and interrupts with questions when requirements are ambiguous.
- **The LLM is a great general athlete. The harness is the coaching.** Klaviyo treats the base model like an athletic high schooler who could play any sport well. To make Composer great at marketing specifically, they feed it live signal on how consumers across the entire Klaviyo network are responding, and a "coach" agent scores every proposal on predicted engagement and revenue before it ships.
- **Agents are power users on day one, and they sit to the right of your best human users.** Software has a power law of user sophistication: a few experts, a long tail of novices who have an hour a week. Agents skip the curve. Onboarding matters less. What matters is what the agent asks you to build next.
- **Headless is the default now, so your product is infrastructure.** Anything a human used to log into should be treated as infrastructure, which means it needs APIs. Klaviyo is building a path to sign up, configure and pay without ever touching the UI, with a dedicated engineer whose only mission is that experience.


Yeah, nice one tech bro ...
... *so, what’s the value created*

Systems thinking wins

McKinsey's high performers were nearly **three times as likely to have redesigned how they work**, not just to have swapped in a newer model. BCG puts a ratio on it: roughly **70% of the value from AI comes from people and process**, and only 30% from the technology itself.

Where we work & how we work is being reshaped



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Rethink Strategy

TAKEAWAY

Get out of the strategy blender and into strategic determinism — rethink for AI-first engagement and intelligence

All strategies — Many in conflict

Marketers must think, strategic determinism matters

95/5 "Rule"

(John Dawes / Ehrenberg-Bass)

Only ~5% of your market is in-market at any time. ~95% are future buyers.

Implication
- Invest beyond activation
- Build memory, not just pipeline
- Budget must fund future demand, not just current conversion

Mental + Physical Availability"

(Byron Sharp)

Brands grow by being: Easy to think of (mental availability). Easy to buy (physical availability) .

Implication
- Distribution + salience beats persuasion

Distinctive Assets vs. Differentiation

(Ehrenberg Bass)

People don't deeply compare brands; they recognise & recall them.

Implication
- Consistency > cleverness
- Build assets (colour, tone, characters, formats)

The Long & the Short of It

(Binet & Field)

Long-term brand building and short-term activation both matter. A 60/40 split.

Implication
- Overinvesting in performance kills future growth
- Brand → lowers CAC, increases conversion, protects margin
- Activation → captures demand now

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Category buyers in market

PRODUCT CATEGORY	INTERPURCHASE PERIOD	ANNUAL CHURN	DECISION PERIOD (DAYS)	BUYERS IN-MARKET OVER A YEAR	CATEGORY BUYERS IN-MARKET
/B2B					avg 5.0%
SaaS	60 months	13%	90	20%	5.0%
Insurance	45 months	17%	60	27%	4.4%
Banking	40 months	19%	60	30%	5.0%
IT Services	65 months	12%	60	18%	3.1%
Professional Services	26 months	27%	60	46%	7.7%
/B2C					avg 4.6%
Cable Provider	30 months	25%	60	40%	6.7%
Power Utility	72 months	11%	60	17%	2.8%
Wet Cat Food	20 days	–	1	–	5.0%
Toilet Tissue	50 days	–	1	–	2.0%
Margarine	15 days	–	1	–	6.7%
Shampoo	15 days	–	1	–	6.7%
Breakfast Cereal	40 days	–	1	–	2.5%

B2B AVERAGE
5.0%

B2C AVERAGE
4.6%

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Rethink tactics

TAKEAWAY

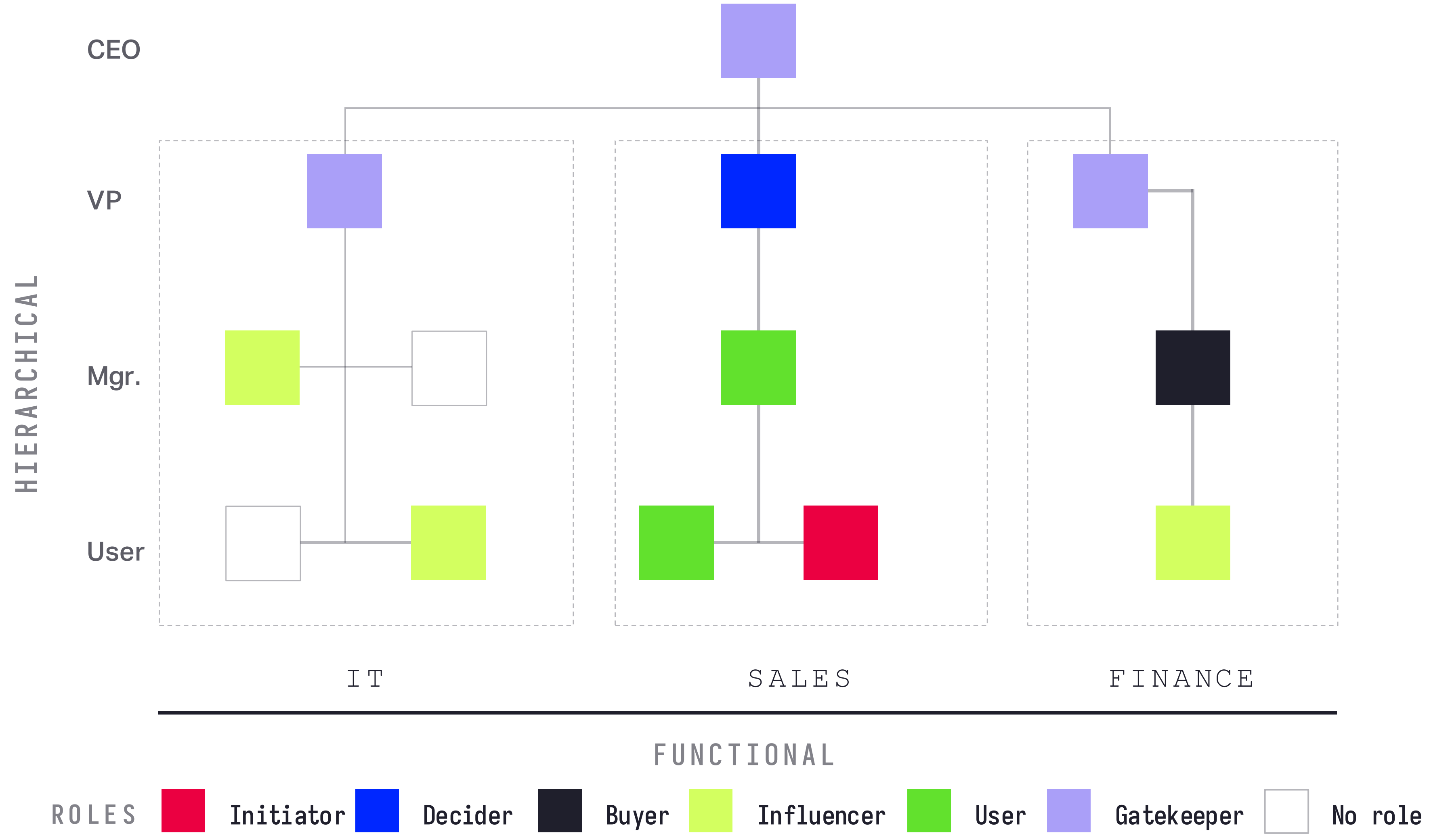
Funnels are fucked — know and optimise for the new buying dynamic & engagement patterns

Funnels were right

Funnels are now wrong

The dynamic isn't linear

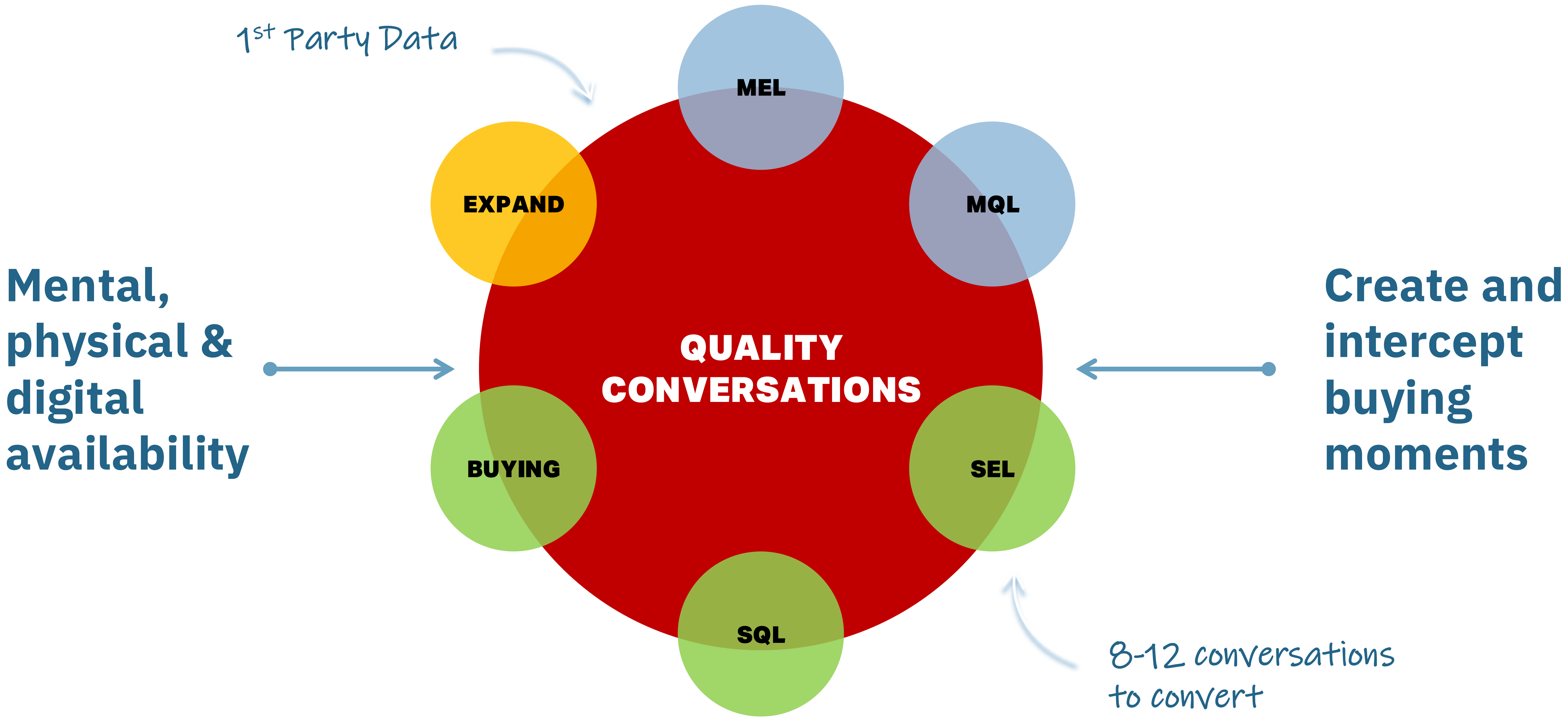
Forrester says the typical business buying decision now involves 13 internal stakeholders and nine external influencers, while procurement is involved in 53% of buying cycles.



OUTBOUND MATHS

6	average touches/contact (actual cadence is longer)
5	contacts/account
60	touches/day
12	months before trying again
100%	percentage of time dedicated to outbound
1,200	outbound touches/month
200	outbound contacts/month (per rep)
40	outbound accounts/month (per rep)
480	accounts (capacity)/year (per rep)

Shift to qualified buying groups



The past

ABM 1.0

vs

Tactic or Campaign
Media centric
Mass buyer journeys
Buying targets
Digital

Present to Future

ABM 2.0

Operating System
Customer centric
Personalised buyer journeys
N1 + buying ecosystem targeting
Multi-channel

The past

ABM 1.0

Single Mode
New customer acquisition

vs

Present to Future

ABM 2.0

Multi-mode
Acquisition
Expansion
Upsell
Retention

The past

ABM 1.0

AI Maxing

vs

Present to Future

ABM 2.0

Human Maxing

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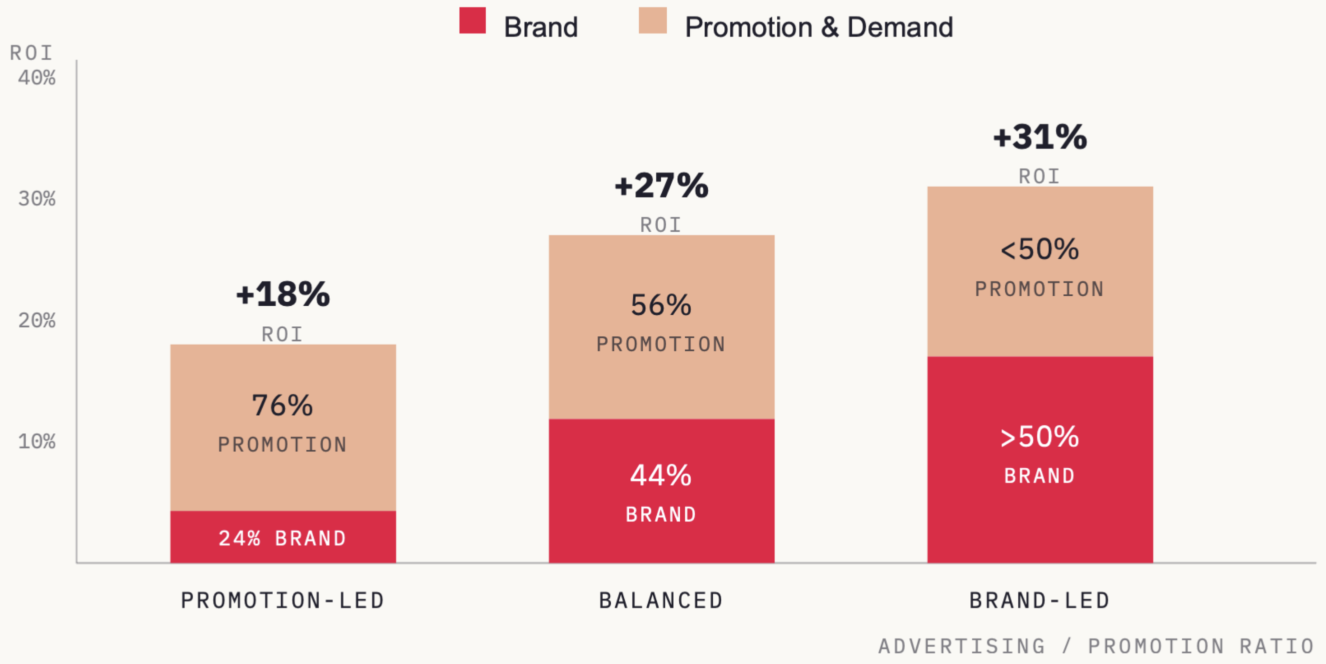
Reshape budgets

TAKEAWAY

Bothism — reshape budgets to support brand and redefine where and how we spend on demand

It's not one or the other



60% awareness
2.86 higher conversion rate

RIFFING ON PETER DRUCKER

"marketing must be a genuine whole: greater than — or at least different from — the sum of its parts"

What is brand anyway?

Events as Brand. Branded events as an asset.

76% of B2B stuck in sea of sameness

distinctiveness vs. differentiation


WHATEVER BUSINESS YOU'RE IN, XERO IN
xero.com
xero
XERO MAKES MANAGING OUR FINANCES A BREEZE
TEA HUGGERS, XERO CUSTOMER
I CAN UNDERSTAND MY BUSINESS IN DETAIL
XERO DOES THE UNTHINKABLE – IT MAKES MANAGING OUR ACCOUNTS A PLEASURE
Way out
Trains to Welwyn

You can't fight brand gravity

Re_

shape budgets
think strategy / tactics
boot marketing
focus time
imagine brand
target ABM
skill our teams

Warami

Thanks & Kia Ora

Andy Lark
Chair, Group Lark & The Accelerants
andy@grouplark.com | andy@theaccelerants.co

@kiwilark andylark