PLAYBOOK:
HOW TO CASH IN ON THOUGHT LEADERSHIP

This playbook has been developed by summarising the insights from a roundtable with 25 marketing leaders and thought leadership experts, which ran at FT Longitude in October 2024.

CogniClick FT LONGITUDE B2B MARKETING

Contents

P3 Introduction

P4 Scoping & planning

P9 Methodology

P13 Activation & execution

P18 Measurement

P22 Next step

Introduction from Joel Harrison

Thought leadership is widely recognised as a powerful tool to differentiate your B2B brand and engage audiences. But its deployment has typically been focused at top or mid-funnel, and opportunities to leverage its power within sales conversations have been missed or not optimised. It's a classic example of misalignment between sales and marketing, and risks dragging out already protracted sales cycles, or worse still, resulting in deals not converted.

So how do B2B marketers maximise the potential of thought leadership within revenue conversations, in turn generating maximum return on investment? This was what we were seeking to understand in a recent roundtable I moderated, organised by **CogniClick** sales enablement and **FT Longitude**, and attended by **25+ marketing and thought leadership professionals** from across tech and professional services.

We used AI to summarise the most salient takeaways from the intensive 1.5 hour roundtable, and then transformed these into this playbook, which details the optimal steps to achieving effective commercial thought leadership - from scoping and planning, to measurement. And we've backed these up with relevant anecdotes from the conversation.

It's a superb playbook, and a thoroughly up-to-date best practice guide.

Joel Harrison, B2B Marketing



SCOPING
& PLANNING



Lightbulb moment:

The planning phase
often determines whether
thought leadership will drive
commercial value or become
another marketing exercise.
Organizations are moving away
from isolated marketing initiatives
toward more collaborative
approaches that engage
commercial teams
from the start.

OPTIMAL STEP 1:

Define commercial objectives early

- Move beyond creating thought leadership in isolation from business goals. This means starting every project by identifying specific commercial outcomes and objectives you want to achieve, such as opening doors to new client conversations, supporting specific sales initiatives, or enabling expansion into new markets.
- Map out how the thought leadership will support different stages of the sales cycle. Consider its role in prospecting, pitch support, deal progression, and account expansion.
- Ensure alignment with broader commercial strategies and priorities. The content should support current business initiatives rather than existing as a separate marketing exercise.

Our head of pre-sales approaches the marketing with specific market observations and customer problems, creating a 'pull' rather than 'push' dynamic. This results in thought leadership that directly supports sales conversations and addresses real market needs

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OPTIMAL STEP 2:

Engage sales teams from the start

- Include commercial teams from the start and in initial planning sessions to understand their client challenges, common objections, and information needs. This helps ensure the thought leadership will be practically useful in sales situations.
- Create structured feedback mechanisms for ongoing input from sales throughout the development process, such as regular review sessions or advisory panels.
- Consider embedding marketing team members within sales teams periodically to better understand their needs and challenges.

> **Bringing sales in at the beginning, rather than at launch, dramatically improves content adoption and effectiveness. As does establishing a monthly forum where sales can share client feedback and challenges that needed addressing**
>
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OPTIMAL STEP 3:

Build internal consensus

- Establish a formal governance structure that includes representatives from all key stakeholder groups (sales, product, subject matter experts, senior leadership).
- Create clear roles and responsibilities for content development, review, and activation.
- Develop a documented approval process that balances the need for accuracy and compliance with maintaining creative impact.

We created a handpicked editorial board of thought leaders across our organization. This not only improved content quality but created automatic buy-in for future content and helped navigate internal politics

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METHODOLOGY

Lightbulb moment:

Research emerged as a critical differentiator between thought leadership that drives commercial value and content that merely fills a marketing calendar. Participants of the roundtable highlighted an interesting tension between the need for robust research and the desire to challenge conventional thinking.

OPTIMAL STEP 4:

Use research

- Think about how you're going to use the research before you start it. If you're wanting to create a model for example of what good looks like or correlate two data points, make sure the questions enable that before you kick off. This sort of question design works brilliantly for narratives that sales can use to drive customers forward.
- Design research methodologies that go beyond confirming existing hypotheses. This might include open-ended qualitative research phases before quantitative studies, or using multiple research methods to triangulate findings.
- Build in mechanisms to challenge internal assumptions and biases. This could include external expert review panels or customer advisory boards.
- Ensure research design allows for unexpected findings rather than just validating existing thinking, products or services. This allows for differentiated and breakthrough narratives.

> **We struggle with research that merely validates our product. We revised our approach to include open-ended customer interviews before designing surveys, leading to surprising insights**
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OPTIMAL STEP 5:

Enable a mirror and peer approach

- Design content that reflects customers' experiences and challenges back to them, helping them recognize their situation in your narrative. This requires deep understanding of customer pain points and business contexts.
- Incorporate peer comparison elements in the content you develop, that allows organizations to benchmark themselves against similar companies.
- Create interactive tools and use data visualisation that enables self-reflection and comparison against peer groups. Design these as if sales is as much your audience as the customer audience.

Good marketing should act as a mirror... when you see something, the person goes, 'that's me' and content that incorporates peer benchmarking consistently outperforms other formats

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ACTIVATION & EXECUTION

ACTIVATION & EXECUTION

Lightbulb moment:

The discussion revealed that many organizations struggle not with creating thought leadership, but with activating it effectively across their commercial teams. This challenge is particularly acute in professional services firms where the "sales team" might comprise hundreds of partners or client-facing professionals.

OPTIMAL STEP 6:

Use flexible formats

- Develop a content architecture that allows core research or insights to be expressed in multiple formats for different audiences and uses.
- Create specific tools and formats optimized for sales team use, such as conversation guides, presentation decks and interactive tools that are as easy for sales to use as they are the customer.
- Design content modules that can be easily customized for different industries or customer segments.
- Plan for content adaptation across different channels and platforms from the outset.
- Structure content to progress from recognition (showing customers you understand their situation) to insight (helping them see new aspects of their challenge) to solution (showing them a path forward).

Our annual CEO survey is transformed into various formats, from brand-level reports to interactive sales tools. This includes social media content, sales presentations, executive briefings, and interactive data visualization tools

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OPTIMAL STEP 7:

Create an internal marketing program

- Create a structured program for internal content promotion, including regular briefings, training sessions, and updates.
- Develop sales enablement materials that help commercial teams understand and use the content effectively.
- Build internal champion networks to promote content adoption across different parts of the organization.
- Create feedback loops to gather usage examples and success stories that can inspire broader adoption.

We implemented regular subject matter expert sessions with different teams, creating a continuous learning environment where sales teams can understand and internalize new insights

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OPTIMAL STEP 8:

Think long-term value creation

- Establish a formal governance structure that includes representatives from all key stakeholder groups (sales, product, subject matter experts, senior leadership).
- Create clear roles and responsibilities for content development, review, and activation.
- Develop a documented approval process that balances the need for accuracy and compliance with maintaining creative impact.

We use our CEO survey data throughout the year, with stakeholders only feeling it was "overused" after nine months. We maintain engagement by regularly adding new analysis and insights to the core data

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MEASUREMENT

MEASUREMENT

Lightbulb moment:

Measurement emerged as the most challenging aspect of commercial thought leadership, with many participants at the roundtable acknowledging the difficulty of attributing direct commercial impact. However, several organizations had found creative ways through this to effectively assess their success.

OPTIMAL STEP 9:

Use commercial impact indicators

Create a framework for tracking both direct and indirect commercial impacts, including:

- Usage in sales meetings and pitches
- Contribution to pipeline opportunities
- Role in progressing or accelerating deals
- Adoption by senior leadership in client presentations

We measure success through our CEO's consistent use of the content in customer meetings and presentations, tracking how often key insights are cited in high-level discussions

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OPTIMAL STEP 10:

Use Behavioural change metrics

Develop qualitative and quantitative measures for tracking changes in stakeholder relationships, such as:

- Shifts in conversation level (tactical to strategic)
- Changes in stakeholder engagement patterns
- Evolution of advisory relationships
- Monitoring long-term changes in client perception and engagement

We measure success through fundamental changes in how stakeholders view and engage with our organization. Thought leadership has elevated our role from vendor to trusted advisor

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A plan for your next thought leadership programme

FTLongitude's partnership with CogniClick enables the delivery of an end-to-end commercial thought leadership programme. From expert strategy and research, to the delivery of best in class content assets for use by your commercial team.

If you'd like to explore how we could transform the commercial effectiveness of your thought leadership book a 1:1 with us.

Book your 1:1 here

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