



Overall Revenue Effectiveness™

Process Engineering for Revenue Growth

INTRODUCTION AND DIAGNOSTIC TOOL

Overall Revenue Effectiveness™

A diagnostic and engineering framework to help middle-market industrials, manufacturers and their private equity sponsors or family owners rebuild revenue growth as an integrated, accountable, process-engineered system, applying the rigor of OEE to board governance, growth strategy, marketing, sales, success, and technology.

2026 Edition – updated for the post-COVID, AI first, consensus-buying era

CONTENTS

Inside this guide

01	What’s Changed: The Watershed Shift Since 2020	3
02	Why I Developed ORE™, and Why It Matters More Now	6
03	How to Use the Diagnostic	8
P01	Board Governance & Corporate Strategy General Strategy · Buyers & Buying Teams · Competitors · Product & Solution Roadmap · Sales Talent as Strategy	9
P02	Marketing General Marketing · Trust & Awareness Building · Content · Community, Influencers & Partners · Website · Search: SEO, GEO & AEO · Competitive Intelligence · Sales Enablement · Demand Creation & Pipeline Generation	15
P03	Technology AI-First CRM & Orchestration Layer · CRM (Core) · Marketing Automation · Email · Sales Acceleration & AI · AI Prospecting & Research Agents · Conversational AI & Coaching · AI Content & Marketing Operations · Agentic Workflows & Integration · Data, Intent & RevOps · Other Technology	26
P04	Sales & Success Sales Team · Sales Training · Sales Management · Quality of Sales Talent: Recruiting, Hiring & Onboarding · Process & Methodology · Tactics · Pipelines & Forecasting · Success (Customer Service)	35
04	Overall Findings & Scorecard	44
05	A Maturity Model	45
06	The Path Forward	47
07	About Ed Marsh & How to Engage	49

What's Changed: The Watershed Shift Since 2020

I introduced the Overall Revenue Effectiveness™ (ORE™) framework in 2023. It codified years of work with industrials, manufacturers, and their family owners and private equity sponsors around a single premise: revenue growth deserves the same engineering rigor these companies already apply to operations. That premise is truer than ever. But the ground under the framework has shifted. Buyer behavior, marketing economics, search itself, and the way complex B2B decisions actually get made have all changed. This edition updates the diagnostic to reflect that new reality.

Cycles vs. Secular Changes

Business cycles arrive and fade. Recessions give way to expansions. Fashions rotate. Tactics come into and out of vogue. The essence of a cycle is reversion to the mean, and we are rightly trained to patiently endure cycles.

Secular changes are different. They develop gradually and fundamentally shift the background. Because they arrive slowly, they are easy to miss. Companies can operate the way they always have without noticing any immediate impact. Until the gap with reality becomes insurmountable.

Modern industrial marketing and sales has lived through two prior secular eras: the long professionalization from roughly 1900 to 2005 (Bernays, McCarthy, Kotler, Carnegie, Xerox PSS), and the inbound / digital era of roughly 2005 to 2020, when the internet inverted the information asymmetry that had defined the prior century.

We are now firmly inside a third secular change. The symptoms are familiar. Close rates are falling. Buyer indecision and risk aversion are rising. Sales cycles are lengthening. More deals die in no decision. Organic traffic is off. Inbound conversions are down. More reps are missing quota. The temptation is to treat those symptoms as a cycle and wait them out. That approach guarantees decline.

In fact, as the changes progress, traditional approaches to marketing, sales and success will largely confirm and reinforce buyers impression that all vendors are essentially comparable. The very efforts many companies are making to differentiate themselves, actually serve to commoditize them. Our best opportunity to differentiate our companies and service/product offerings is to change our Go-To-Market (GTM) motions.

The 2026 ORE™ Framework is designed to help you adapt ahead of competitors, most of whom are still trying to make the old playbook work which is ill-suited to today's Zero-Click, Zero-Trust environment.

The New Buyer Reality: By the Numbers

Three independent bodies of research (Pavilion and TrustRadius, 6sense, and SparkToro) point to the same conclusions about how complex industrial buying actually happens today:

- Most complex, big-ticket buying journeys now stretch beyond 8 months.
- In 87% of cases, buyers initiate first contact with vendors, and only after they are roughly 65% through their buying journey.
- When the vendor makes first contact instead of the buyer, win rates plummet.
- The winning vendor is the one contacted first 81% of the time.
- Buying teams consider an average of 4 vendors, but in roughly 80% of cases, only vendors already known to the buyer before research began make it onto the shortlist.
- 71% of the time, the vendor at the top of the shortlist wins the order.
- A typical complex deal involves ~350 interactions between buyer and seller.
- 84% of the time, specifications and requirements are locked in before the buyer ever speaks to a vendor.

- Only ~29% of Google searches now result in a click on an organic result; nearly 60% go nowhere at all (Google AI Overviews answer the question, or the user gives up). LLM research bypasses Google entirely.
- Buying teams have grown from 3–5 people a decade ago to 12–15 people today, and they increasingly demand consensus, meaning a single dissenter can quietly kill a project.

Two practical conclusions follow. First, waiting for buyers to find us is futile. Reach has to happen long before any active project. Through trust, brand, video, community, and partner ecosystems. Not through optimized blog posts answering long-tail keywords with articles nobody reads. Second, our sales reps cannot wait for projects to appear. Responding to inquiries is customer service, not sales. Reps have to be capable of consultatively CREATING projects: uncovering problems beyond pain, quantifying business outcomes, building urgency, and converting nice-to-have into must-have inside increasingly skittish buying committees.

ORE™ has always been about treating revenue growth as an integrated system. The 2026 edition makes explicit the new things that system has to do well: build trust before need exists, create projects rather than wait for them, hire and develop right-tail talent capable of consultative selling, and deploy AI as a force multiplier rather than as a content firehose.

Why I Developed ORE™, and Why It Matters More Now

Through my work with industrial manufacturers I keep encountering the same archetype. A company with a traditional sales and marketing organization gradually becomes aware that leads and projects are harder to come by. Marketing is small (often a hat worn by someone with a primary role elsewhere) and focuses on trade shows, journal ads, and a brochure website. The sales team is larger and distributed across direct field or channel sales. They're generally technical experts, lightly trained in sales and loosely accountable. CRM use is sporadic, new account wins are rare and they focus on uncovering new projects with existing customers. Prospecting is minimal – I often hear “Cold outreach doesn't work in our industry.” Coaching is rare. Roleplaying is unheard of. Sales process is administrative. Opportunity qualification is based on gut feeling and the CRM out-of-the-box pipeline. Management worries that leads are slipping and pursues more leads, often saying nearly verbatim: “when we're at the table we win; we just need to be at the table more often.”

I've seen this movie many times.

I used to start with a digital marketing pilot: marketing automation plus a website overhaul aimed at lead generation. Done right, that required real strategy work. Market trends, competitors, ICP, buying teams, buyer personas, buying journeys, problems to solve, jobs to be done, pricing, product roadmap, SWOT. The research almost always challenged longstanding internal assumptions. And as the pilot progressed, two other things consistently surfaced.

First, there was no technical infrastructure to track leads through to revenue. Which meant no way to measure or improve. Second, industrial sales teams almost universally did very little to actually sell the leads. And resisted accountability for doing so. The marketing investments produced leads and meetings, and then those leads and meetings died in the handoff.

Two industrial revenue growth axioms came out of watching this pattern repeat. Successful companies with diligent management often have broken revenue growth functions. Each element (board governance, strategy, marketing, sales, success, technology) performs somewhere between poor and average, masked by brand recognition and customer reorders. And tweaking one element in isolation produces cost without return. Successful revenue growth today is built on a strategically designed, fully integrated system of governance, strategy, marketing, sales, success and technology, with explicit and ongoing management support. That is the discipline ORE™ codifies.

What has changed since 2023 is the magnitude of market change and urgency of action. The buying shifts catalogued in the previous section mean that the cost of a broken revenue growth function compounds faster than ever. The single biggest GTM lever in the middle market today (particularly for sponsor-owned portcos with organic growth in their value-creation plan) is a superb sales manager building and guiding a superb sales team, supported by marketing that earns trust before a project exists. That requires savvy governance, unapologetic right-tail talent, engineered hiring, a predictively accurate sales-specific assessment, real coaching, adapted marketing, and a tech stack (including AI) that actually multiplies rep effectiveness. ORE™ is how you put that system on paper and then in the ether and on the ground.

How to Use the Diagnostic

The purpose of this diagnostic is not to critique your current structure. There is almost certainly room for improvement, that is exciting. No company does all of this well; if you can become good at most of it, you will probably be well ahead of competitors. That is exciting too. Answer the questions honestly. Then you decide. If there are too many “No” answers for comfort, that is the conversation worth having.

DEFAULT ANSWER IS “NO.”

If you are unsure, if you have to ask marketing, sales, or IT to verify it, or if you have some of a criterion in place but not all of it, the answer is “No.” That is not a critique; it is reality, and the only useful starting point for engineering improvement.

Scoring

Each pillar (Governance, Corporate Strategy, Marketing, Sales, Success, and Technology) ends with a results row. Tally Yes / No answers and compute % Yes. The Overall Findings page rolls those up. Most companies score below 35% on first pass. That is a normal starting point.

Maturity, not pass/fail

Each Yes/No question represents a continuum of proficiency. The Maturity Model section near the end of this document shows how a single diagnostic item expands into Rudimentary → Typical → Advanced → Best Practice levels. After the initial tally, the more interesting conversation is where on each continuum you sit and which moves up the curve will create the most leverage for your specific business – e.g. which to prioritize.

PILLAR 01

Board Governance & Corporate Strategy

Strategy is the upstream input to every other pillar. A muddled strategy or one that has not been updated for the post-2020 buying reality forces marketing, sales and technology to make corrections for problems they cannot solve.

General Strategy	YES	NO
Firm has a mindset oriented around understanding buyers vs. driving sales.	☐	☐
Management emphasizes adapting internal process to improve buyer experience.	☐	☐
Customers are viewed as prospective buyers, lifecycle revenue is measured and tracked.	☐	☐
Pricing is above industry average, price increases stick, margins grow.	☐	☐
Management cultivates a culture of accountability, performance gaps are addressed promptly without excuses.	☐	☐
Branding is an explicit consideration in every tactical strategy, marketing and sales activity.	☐	☐
Board considers return on equity / IRR implications of GTM effectiveness at least annually in plan updates.	☐	☐
Board has at least two members with contemporary (within the last 5 years) digital marketing and modern sales experience, and at least two additional members with senior executive experience in different industries and business models.	☐	☐

General Strategy (continued)

	YES	NO
Board maintains a list of potentially attractive acquirers and acquisition targets for ongoing platform growth.	☐	☐
Strategy discussions explicitly consider impact of emerging technologies (3D printing / additive, IIoT, PaaS, blockchain, AI-augmented competition).	☐	☐
The internal IT team (responsible for networking, cloud storage, etc.) is NOT the technology resource for marketing, sales, and product innovation decisions.	☐	☐
Revenue growth process is cultivated as IP and a strategic differentiator.	☐	☐
Leadership has explicitly recognized the post-2020 secular shift in buying (consensus committees, zero-click search, zero-trust buyers, AI-mediated research) and has a stated plan to adapt.	☐	☐
Leadership has a defined position on the role of AI inside the revenue function, both as a tool for the team and as a force reshaping competitor capability – with KPIs for expansion.	☐	☐

Buyers & Buying Teams

	YES	NO
Defined ICP (ideal customer profile) incorporates at least size, geography, industry, growth trend, philosophy, ownership, and problems to be solved.	☐	☐
Clear mapping of buying team, buying journey, and key decision points for marketing and sales activity, updated within the last 12 months.	☐	☐
Buying team mapping reflects today's reality (12–15 stakeholders typical in complex deals), not the simpler buying teams of a decade ago.	☐	☐

Buyers & Buying Teams (continued)

	YES	NO
Third-party qualitative buyer research supports persona and buying-journey assumptions, not internal opinion.	☐	☐
Buying decision financial models (CAPEX justification frameworks, ROI / payback expectations, capital-allocation cycles) are clearly understood and created with sound business criteria.	☐	☐
Company shares its own buying process, internal politics, and decision models with marketing and sales to avoid dissonance between assumptions and reality.	☐	☐
Senior execs and board members engage directly with key and randomly selected buyers and prospects on a recurring basis.	☐	☐
The entire revenue function is explicit about the business outcomes it creates for buyers and the cascading consequences of buyer inaction.	☐	☐
Company tracks "no decision" losses as a distinct category and has a named owner for reducing them.	☐	☐
Company has a documented approach to influencing buying committees early, before specifications and a shortlist are locked (recognizing that ≈84% of specs are set before vendor conversations begin).	☐	☐
Marketing and sales have a shared understanding of which buyer-journey activities are observable via intent / 1st-party data and which require relationship-driven discovery.	☐	☐

Competitors

	YES	NO
Direct competitors are identified and tracked strategically (leadership changes, financials, transactions, partnerships) and tactically (win/loss, technical features, pricing) with robust battlecards.	☐	☐

Competitors (continued)

	YES	NO
Buyer status quo ("do nothing") is recognized and named as a competitor.	☐	☐
Indirect competitors (e.g., outsource vs. capital investment; refurbish vs. replace) are tracked and their value propositions are studied through buyer research.	☐	☐
Board has identified specific competitors as strategic threats / opportunities.	☐	☐
Company has a plan for competition from its own installed base (third-party used machine sales, aftermarket cannibalization, etc.).	☐	☐
Company tracks how it is being represented in AI Overviews, LLM responses (ChatGPT, Perplexity, Claude, Gemini) and on aggregator / review sites, and competitor presence in the same surfaces.	☐	☐
Company tracks competitor presence in non-traditional channels where buyers actually spend time (Reddit, Quora, YouTube, Instagram, industry communities).	☐	☐

Product & Solution Roadmap

	YES	NO
Company is clear on the operational value its solutions provide to customers (material outcomes) and plans roadmap around buyer-derived requirements (vs. projects that R&D enjoys).	☐	☐
R&D is explicitly segmented into current product innovation, new product development, and speculative development.	☐	☐
Product plans include emerging technologies (additive, IIoT, PaaS, product as a service, blockchain, AI-enabled features).	☐	☐
Company consistently considers buying / licensing component technologies vs. developing them in-house.	☐	☐

Product & Solution Roadmap (continued)

	YES	NO
Partnerships are strategically identified to support product line expansion and to enter buyer ecosystems earlier.	☐	☐
Product offerings are designed both to enable entry into new markets and to deepen commercial relationships in existing ones (entry-sale strategy).	☐	☐
R&D committees include representatives from board, management, sales, marketing, finance, and engineering, and may include outside consultants, partner reps, and industry SMEs.	☐	☐
Service, software, and outcome-as-a-service offerings have been explicitly evaluated as roadmap additions.	☐	☐

Sales Talent as Strategy

	YES	NO
Leadership treats Quality of Sales talent as a strategic, not HR, issue, and owns it accordingly.	☐	☐
Board and senior leadership recognize that the single biggest GTM lever is a superb sales manager building a superb team of right-tail (≥ 2nd standard deviation) reps.	☐	☐
Sales talent strategy is reviewed at board level at least annually alongside product, capital, and capacity strategy.	☐	☐

Sales Talent as Strategy (continued)

	YES	NO
Company has a defined plan to identify, attract, hire, and retain right-tail sales talent, including infrastructure (CRM, methodology, tech stack, coaching, accountability culture) that top performers expect.	☐	☐
Compensation philosophy reflects market reality for top talent (≈ \$125K base / \$250K+ OTE for complex industrial AEs).	☐	☐
Detailed, structured onboarding complements tracking & review of hiring success rate, ramp time, quota attainment, and turnover alongside other key financial metrics.	☐	☐

CORPORATE STRATEGY RESULTS (46 QUESTIONS)

YES ____ NO ____ % YES ____

PILLAR 02

Marketing

The original ORE framed marketing as the engine of inbound lead generation. That framing is no longer sufficient. Buyers now spend ≈ 65% of an 8-month journey researching independently before they ever contact a vendor. They are not finding us by searching long-tail keywords, clicking Google links, reading articles, then converting on CTAs to "download a free PDF." They are finding us only if they already know us, or if they encounter us in trusted, peer-driven channels in ways that have educated them. Marketing's job today is to build trust and presence well before any project exists, and to enable sales to convert that presence into shortlist position. "Demand generation" is being supplanted by "demand creation."

General Marketing	YES	NO
Marketing is treated as a revenue function with accountability for attributable revenue against investment.	☐	☐
Management recognizes and frequently states publicly that modern marketing performs functions that used to belong to sales (education, trust building, qualification).	☐	☐
Budget target is at least 3% of gross revenue, with explicit allocation for brand / trust / community as distinct from demand capture.	☐	☐
Clear KPIs for impact (not output) are established and tracked.	☐	☐
Job title, compensation, and org structure establish approximate parity between senior marketing and sales leaders although team size will be larger in sales.	☐	☐
Digital, video, social, and ungated trust-building activity receives more resources than trade shows.	☐	☐

General Marketing (continued)

YES NO

Staffing, outsourcing and resourcing support all the following functions: design, SEO / GEO / AEO, content (planning, copywriting, editorial, video, audio), demand generation and demand creation, paid media, PR, competitive marketing, product marketing, branding, marketing operations, technology management, data management, sales enablement, trade show management, partnerships, community management, and video – with constant use of AI to boost efficiency.

☐ ☐

Marketing has aggressive adoption of AI, with clear guardrails and brand guidelines.

☐ ☐
Trust & Awareness Building

YES NO

Company has an explicit strategy to be "known" by buyers well before any active project (recognizing that 80% of shortlist seats go to vendors already known before research begins).

☐ ☐

Executives and SMEs have public personal brands, and content is created with and through them, not only from a corporate page.

☐ ☐

Marketing operates outside the company's own domain, guesting on industry podcasts, YouTube channels, partner newsletters, conferences, and trade press.

☐ ☐

Trust-building content is unapologetically not gated and not optimized for conversion to MQL, it is optimized for memory and reputation.

☐ ☐

PR and analyst relations are active and aligned with marketing, not vanity efforts.

☐ ☐

Brand-tracking research is performed at least annually to measure unaided awareness and reputation in target segments.

☐ ☐

Content	YES	NO
Content is built on both qualitative buyer research AND quantitative search / topic research, and explicitly accounts for zero-click search reality.	☐	☐
All content is created against a rigorously developed content calendar that is subject to at least quarterly review.	☐	☐
Website content and refresh recognize it's primary role as a bottom of the funnel resource and feeder for LLM references.	☐	☐
Content mix is heavily weighted toward passively consumable formats, short and long form video, audio / podcast, social-native posts, not only written articles.	☐	☐
Off-domain content (Reddit, Quora, Instagram, YouTube, industry forums) is part of the calendar, not an afterthought.	☐	☐
An editorial style guide (tone, grammar, voice, do/don't language, AI-use policy) is in place and enforced.	☐	☐
All content is buyer-centric, written for problems and outcomes, not feature lists.	☐	☐
Content is multi-purpose (organic search / get-found / convert / sales enablement / buyer coaching to help the deal champion sell internally / link building / AI surface inclusion).	☐	☐
Company provides an industry insight "curation" service via email and articles.	☐	☐
Content speaks directly to questions buyers actually ask, including risk-aversion questions ("what if this doesn't work / what could go wrong / how do peers think about this?").	☐	☐
Content team includes defined roles including editor, video producer, and a designated AI / production-tooling lead.	☐	☐

Content (continued)

	YES	NO
Content plan includes video, articles, outside posts, events, press releases, downloadable offers, interactive guides, and interactive tools, calibrated to where each buyer persona actually consumes content.	☐	☐
Personalized content is delivered based on segments (target account, industry, return visit, current customer, etc.) across channels, web, email, chat, and ads.	☐	☐
Knowledge base is populated, optimized, and connected to chatbots and on-site search.	☐	☐
Customer portal provides access to machine, order, service and quoting history.	☐	☐
Management participates in content creation, setting an example for accountability and content support among other departments (engineering, sales).	☐	☐
All employees are expected to maintain a corporate-aligned social media presence (at least LinkedIn) and content is pushed to their profiles where appropriate.	☐	☐
All employees subscribe to company emails and content updates.	☐	☐
AI is used to multiply production but never to replace SME insight, every piece of content has a human owner accountable for its accuracy and point of view.	☐	☐

Community, Influencers & Partners

	YES	NO
Company actively participates in, sponsors, or operates communities (Slack, Discord, LinkedIn groups, in-person meetups, industry associations) where target buyers gather.	☐	☐
Company is comfortable participating in communities alongside competitors when that is where buyers actually are.	☐	☐

Community, Influencers & Partners (continued)

	YES	NO
Defined influencer / SME / partner programs co-create content and cross-pollinate audiences.	☐	☐
Customer advocacy programs (reviews, case studies, references, peer-to-peer introductions) are systematic, not opportunistic.	☐	☐
Marketing has a documented partner-content motion, leveraging adjacent experts and vendors to expand reach and credibility.	☐	☐
Community ROI is measured through trust / reputation / pipeline-influence proxies, not solely lead volume.	☐	☐

Website

	YES	NO
Website CMS is standard, off-the-shelf, and production grade (not homemade, not Wix).	☐	☐
Site is remotely hosted on infrastructure built for performance and uptime.	☐	☐
Site is built on a strong technical foundation (server speed and security, automatic patches and upgrades, core web vitals monitored).	☐	☐
Most site development can be managed internally by team members without specific technical training. AI is used in constant technical review, buyer experience and performance improvement.	☐	☐
Site is built (and continuously updated) with a focus on user experience and conversion optimization, not primarily design aesthetics.	☐	☐
Progressive development and improvement is planned in parallel with editorial calendar; development resources are allocated quarterly.	☐	☐

Website (continued)

	YES	NO
Employees are urged to use the site (with built-in search) to answer their own questions.	☐	☐
Variable / dynamic content creates appropriate experiences for different visitors (e.g., existing customer vs. target account, one industry vs. another).	☐	☐
Performance is continuously A/B tested (page, form, CTA, headline) and then optimized.	☐	☐
Site includes at least industry, news and event blogs, a knowledge base, customer portal, and ecommerce capability where applicable.	☐	☐
Multiple language options are available if the business has international reach, and content is "co-created" vs. translated.	☐	☐
Pricing information (at least general) and descriptions of ideal and suboptimal customers are publicly available.	☐	☐
CMS is integrated with marketing automation and CRM databases.	☐	☐
Structured data / schema or equivalent, and AI-friendly markup are implemented to support inclusion in AI Overviews and LLM responses.	☐	☐
Site is monitored for AI / bot traffic and for citation in LLM answers, and the trend is tracked over time.	☐	☐

Search: SEO, GEO & AEO

	YES	NO
Technical audits and updates are periodic and scheduled.	☐	☐

Search: SEO, GEO & AEO (continued)

	YES	NO
Content checklists and audits follow guidelines on AI related schema, image size, alt tags, image titles, page titles, internal and external link structure and clusters, page construction (titles, URLs, meta, H levels, length), server structure, core web vitals, unused / optimized scripts, tag manager, and structured data.	☐	☐
Content is created with incorporated audience and ranking insights.	☐	☐
Content benchmarked against competitors; both relatively and absolutely important key terms are pursued.	☐	☐
Content optimization evolves with established best practices; the team uses appropriate tools (dynamic optimization integrated via .mcp) and consistently reads industry sources.	☐	☐
Optimization (web, content, video, PR) is an explicitly assigned responsibility within the marketing function.	☐	☐
GEO / AEO (Generative Engine Optimization / Answer Engine Optimization) is actively practiced, content is structured to be retrieved and cited by AI Overviews, ChatGPT, Perplexity, Claude, Gemini, and others.	☐	☐
Company tracks its citation share in AI answers for key buyer questions and competitor mentions inside those same answers.	☐	☐
Strategy explicitly recognizes that $\approx 60\%$ of Google searches now end in zero clicks; success is measured on visibility and mentions, not only clicks.	☐	☐
Branded search trend is tracked as a leading indicator of trust / awareness.	☐	☐

Competitive Intelligence

	YES	NO
There is a physical or digital "war room" with extensive competitive profiles maintained over time.	☐	☐
All sales and marketing folks contribute competitive insights regularly.	☐	☐
Competitive intelligence is incorporated into marketing and sales messaging.	☐	☐
Competitive intelligence is incorporated into sales enablement (battlecards, objection handling, playbooks, talk tracks).	☐	☐
AI tracking for competitors, key players, market trends, etc. is in place and properly routed/incorporated into account plans, content, etc.	☐	☐
Team tracks competitor job postings and content as leading signals of strategy.	☐	☐
Team has specific competitive tracking skills and workflows.	☐	☐
Competitive marketing is an explicitly assigned responsibility within marketing.	☐	☐
Competitor presence inside AI Overviews and LLM answers is tracked and used to inform GEO / AEO strategy.	☐	☐

Sales Enablement

	YES	NO
Sales team understands the ICP and how to prioritize accounts and projects.	☐	☐
Team has battlecards for each major competitor and for buyer status quo / no-decision.	☐	☐
Team has playbooks for each major account approach (knockout, greenfield, displacement, expansion, etc.).	☐	☐

Sales Enablement (continued)

	YES	NO
Paid ads are used to reach target accounts and accounts with active open opportunities.	☐	☐
Marketing and sales automation are used to tactically optimize trade show value and follow-up.	☐	☐
Enablement content is available via a portal and includes the ability to share with tracking so sales can observe prospect engagement.	☐	☐
Training is provided to help sales interpret first-party intent data (site activity, email, content, social) and AI orchestration automatically coaches reps on how to interpret and react.	☐	☐
Sales process and methodology are tied to content creation and the website so enablement content is optimized.	☐	☐
Enablement content and resources are designed to help reps navigate each persona, buying-journey stage, and buying-team role.	☐	☐
Marketing provides email templates, prospecting and pipeline dashboards, access to data enrichment tools and other capabilities focused on improving sales efficiency and effectiveness.	☐	☐
Enablement equips reps for consultative project-creation, not only project capture.	☐	☐
Buying-team-mapping templates, deal-champion enablement, and tools for buyer-side internal selling are explicitly included in enablement.	☐	☐

Demand Creation & Pipeline Generation

	YES	NO
Lead stages and terms are clearly defined, consistently used, and reflected in CRM and other technology.	☐	☐

Demand Creation & Pipeline Generation (continued)

	YES	NO
Clear KPIs exist for marketing (demand creation, awareness, engagement) and for sales (lead follow-up cadence, touches, timeline, feedback to marketing).	☐	☐
Lead-scoring frameworks consider both contact and account-level activity, content engagement, and propensity-to-buy signals.	☐	☐
Marketing collaborates with sales in explicit ABM / target-account programs.	☐	☐
Marketing collaborates with sales on outbound prospecting, providing list, intent, contact data, and creative.	☐	☐
Demand-creation campaigns (vs. capture) are explicitly resourced and measured.	☐	☐
Data is properly cleansed, enriched, and maintained for accuracy.	☐	☐
Marketing provides a full data stack to sales (contact and industry databases for enrichment and prospecting, third-party intent, technographics) using AI to make it contextual and seamless.	☐	☐
Conversion optimization tracks KPIs including keyword rankings, click-through rate, form submissions, CTA performance, page performance, bounce rate, chat engagement, and AI-citation share.	☐	☐

Demand Creation & Pipeline Generation (continued)	YES	NO
Lead-to-project and lead-to-revenue metrics are tracked at the campaign level.	☐	☐
Paid ads are used tactically for specific terms, target accounts, and retargeting flows.	☐	☐
PR is used to expand reach of content and to create opportunities for executive SME demonstration.	☐	☐
Lifecycle revenue from each lead source and CPL (cost per lead) are tracked, and reviewed alongside influenced-pipeline metrics rather than in isolation.	☐	☐

MARKETING RESULTS (98 QUESTIONS)

YES ____ NO ____ % YES ____

PILLAR 03

Technology

Technology is the connective tissue. In the original ORE™, the priority was simply to deploy a CRM, marketing automation, CMS, email, and sales acceleration tools. And to actually use them. Some remain essential while others are suddenly irrelevant. What is new is that AI has moved from novelty to core infrastructure. In content production. In opportunity qualification. In deal coaching. In customer-facing search. And in the very surfaces where buyers form opinions about our brand. The 2026 stack has to treat AI as a first-class citizen, not as a 14th line item.

A useful frame for the 2026 tech stack is layered. At the bottom sit systems of record (CRM, MAP, CMS, CPQ, ERP). Above them sit systems of engagement (email, chat, video, meeting, community). Above those sit systems of intelligence (revenue intelligence, intent, product usage). And on top sits an AI orchestration layer that gives models durable memory of your accounts, opportunities, playbooks, and brand voice, plus the ability to act across those systems via protocols like MCP (the Model Context Protocol). Companies that build the orchestration layer well will get compounding leverage from every underlying system. Companies that do not will just accumulate more SaaS subscriptions.

AI-First CRM & Orchestration Layer	YES	NO
AI native CRM is treated as the durable memory of the revenue function, not as a reporting database. Every account, contact, opportunity, and interaction is captured, structured, and available to both humans and AI agents.	☐	☐
The CRM (or an orchestration layer that sits on top of it) provides AI agents with context: account brief, deal history, buying-team map, prior interactions, product usage, support history, and current signals, and engagement is via agents.	☐	☐

AI-First CRM & Orchestration Layer (continued)

	YES	NO
AI agents can act on records (draft an email, log a call, update a stage, create a follow-up task, generate a proposal draft) with human approval, not just read them.	☐	☐
The stack exposes tools to AI via a standard protocol (MCP or similar) so a single model can span CRM, email, meeting recorder, deal desk, marketing automation, and knowledge base without brittle integrations.	☐	☐
Prompt libraries, brand voice, ICP definition, methodology, and playbooks are stored as versioned assets that models retrieve on demand, not pasted ad hoc into ChatGPT.	☐	☐
Model choice is explicit and governed (frontier model for reasoning-heavy work; smaller / cheaper models for routine drafts and summaries). Cost, latency, quality, and data-handling are tracked.	☐	☐
Sensitive customer data flows to AI providers that meet the company's data-handling and retention standards, and no rep is quietly pasting proprietary content into consumer-tier chatbots.	☐	☐
There is a named owner (RevOps, CTO, or fractional AI leader) accountable for the AI orchestration layer, its policies, and its measurable business impact.	☐	☐

CRM (Core)

	YES	NO
All reps and managers are accountable for CRM use – and use now happens automatically through integrations.	☐	☐
No external reports (spreadsheets, manual exports) are used for tracking projects and accounts.	☐	☐
Reps work from the company's preferred platform (app, email, Slack, Teams, etc.) and the CRM engagement happens there.	☐	☐

CRM (Core) (continued)

	YES	NO
CRM includes tools for sales force automation and sales acceleration.	☐	☐
Sales pipelines have integrated and calculated stage criteria, not subjective sliders.	☐	☐
CRM reflects the sales process and methodology, and is updated when either changes.	☐	☐
Customer, deal, and contact data are enriched automatically from authoritative third-party sources.	☐	☐
Buying-team / buying-committee mapping is supported natively in the CRM, not in side documents.	☐	☐
AI-driven next-best-action, deal-risk, and account-health signals are surfaced inside the CRM (not in a separate dashboard nobody opens).	☐	☐
The CRM is capable of exposing its data to AI agents via API and (increasingly) via MCP, so the AI orchestration layer can read and write with full context.	☐	☐

Marketing Automation

	YES	NO
Marketing automation software is in use and configured.	☐	☐
Conversational marketing / chatbots are in place, increasingly powered by AI for genuinely useful answers and engagement with visitors.	☐	☐
Marketing team includes a marketing operations role.	☐	☐
Lead capture, nurturing, scoring, and profiling are supported by automation workflows and rules-based segmentation and execution.	☐	☐

Marketing Automation (continued)

	YES	NO
GTM (marketing and sales leadership) controls the technology decisions and management (not IT).	☐	☐
Software provides SEO, ad tracking and management, social media management, video tracking, email marketing and tracking, account-based marketing, lead tracking, analytics and reporting.	☐	☐
AI-driven personalization (content recommendation, send-time optimization, subject-line generation, dynamic copy) is in production and measured.	☐	☐

Email

	YES	NO
Marketing email runs against the editorial calendar with segmented content.	☐	☐
Send times are optimized using AI to reduce bounces / spam and to maximize engagement.	☐	☐
Personalized sending is used so emails arrive from the account / relationship owner.	☐	☐

Sales Acceleration & AI

	YES	NO
Team uses sales acceleration / sales force automation tools to optimize outbound and prospecting efficiency.	☐	☐
Chat routing and AI sales chatbots improve user experience and boost meeting conversions.	☐	☐
Sales video tools enable short, personalized video messages in email and social channels.	☐	☐
Meeting-scheduling links simplify meeting conversion.	☐	☐

Sales Acceleration & AI (continued)

	YES	NO
Sales receives real-time alerts for prospect / customer site visits, email opens, and content engagement.	☐	☐
Content, email templates, and intent data are readily available for reps, mapped to roles and buying-journey stages detailed in CRM and prompted by the orchestration layer.	☐	☐
AI agents / copilots assist with research, account briefs, pre-call prep, post-call summaries, CRM updates, and email drafting, and the team is trained to use them.	☐	☐
Generative AI is governed (data handling, brand voice, factual accuracy, customer-data privacy) and the team follows the policy.	☐	☐

AI Prospecting & Research Agents

	YES	NO
AI research agents are used to build account briefs, identify triggers, and enrich prospecting lists, emphasizing phone engagement over email.	☐	☐
Research prompts and templates are standardized so the whole team produces consistent, high-quality briefs reinforcing outcome based consultative sales.	☐	☐
AI-assisted prospecting messages are personalized based on real research (recent 10-K disclosures, leadership changes, published strategy, product announcements), not generic first-name / company-name mail-merge tokens buyers now recognize instantly.	☐	☐
The AI stack for outbound is calibrated for QUALITY over volume. Reps are held accountable for reply and meeting rates, not just send counts.	☐	☐
Buying-committee mapping is AI-assisted (org chart inference, LinkedIn / news signal aggregation, role likelihood) and refined by the rep.	☐	☐

AI Prospecting & Research Agents (continued)

YES NO

AI is used to draft, but a human rep owns the send. Reps are trained to spot and correct AI hallucinations before anything reaches a prospect.

☐ ☐
Conversational AI & Coaching

YES NO

Call recording is in place for sales and customer conversations, with consent management and retention policy.

☐ ☐

Conversational AI / revenue intelligence extracts coaching insights, deal-risk signals, and competitive mentions.

☐ ☐

AI meeting notetakers automatically produce structured meeting notes, action items, and CRM updates from every internal and external call.

☐ ☐

Sales managers actually use call recordings and AI insights to coach, not just to monitor, with AI building coaching and role-playing agendas.

☐ ☐

AI-extracted insights are fed back into enablement (what works, what doesn't, what objections are rising, what competitor mentions are trending).

☐ ☐

AI is used to score deal risk and pipeline health against a defined qualification framework, not as a black box.

☐ ☐

Customer and prospect calls are sources of structured market intelligence, not one-off anecdotes.

☐ ☐
AI Content & Marketing Operations

YES NO

AI-assisted content production tools are used with defined workflows and a brand-voice profile, not ad hoc, and against specific content types (video script, case study, LinkedIn post, AI optimized article, etc.)

☐ ☐

AI Content & Marketing Operations (continued)

	YES	NO
The company has a documented AI content policy (what AI can draft, what a human has to author, what disclosure is required, primary source citations, what SME review is required).	☐	☐
AI is used for GEO / AEO optimization work: identifying prompts buyers likely ask LLMs, producing content structured to be cited, and monitoring how the company appears in AI answers.	☐	☐
Marketing uses AI for research at scale (competitive teardowns, industry trend synthesis, customer voice mining) instead of relying on quarterly agency reports.	☐	☐
Video and audio production leverage AI (transcription, chaptering, clip generation, dubbing, thumbnail generation) to lower the cost of the passively consumable content today's buyers actually engage with.	☐	☐
AI use in marketing is measured for output quality and business impact, not just volume produced.	☐	☐

Agentic Workflows & Integration

	YES	NO
Workflow-automation platforms (Zapier, Make, n8n) and AI orchestration platforms are used to connect tools and to embed AI steps inside recurring processes (lead routing, quote follow-up, renewal alerts, competitive-signal alerts).	☐	☐
Agent-based workflows are deployed for well-defined, high-frequency tasks (inbound lead qualification, meeting scheduling triage, quote status updates, contract redlining, renewal outreach).	☐	☐
Every agentic workflow has a defined owner, success metric, guardrails, and human-in-the-loop escalation path.	☐	☐

Agentic Workflows & Integration (continued)

	YES	NO
The company has a defined stance on where autonomy is granted to agents (draft-only, act-with-approval, act-and-notify) and reviews it as trust in each workflow grows.	☐	☐
Model Context Protocol (MCP) or an equivalent standard is used so a single AI assistant can span the tech stack without brittle point-to-point integrations.	☐	☐

Data, Intent & RevOps

	YES	NO
A defined RevOps function owns data definitions, lifecycle stages, and reporting across marketing and sales.	☐	☐
First-party intent (site, email, content, app, product, support) is captured, unified, and surfaced through AI orchestration.	☐	☐
Data is regularly cleansed, deduped, and enriched.	☐	☐
AI first CRM provides a memory/context/orchestration layer incorporating all tools.	☐	☐
Reporting goes beyond MQL / SQL counts to influenced pipeline, deal velocity, win rate by source, and lifetime value by segment.	☐	☐
Data, AI use, and reporting are governed by clear policies (privacy, retention, access).	☐	☐

Other Technology

	YES	NO
CPQ (configure, price, quote) software with engagement metrics, not simply an ERP module.	☐	☐
Site behavior recordings and heatmaps.	☐	☐
Content optimization tooling.	☐	☐

Other Technology (continued)	YES	NO
Video tracking.	☐	☐
SMS marketing / sales.	☐	☐
Competitive marketing platform.	☐	☐
Data maintenance and hygiene.	☐	☐
Social media listening and scheduling.	☐	☐
Media scanning / journalist outreach.	☐	☐
Incoming call tracking.	☐	☐
Ecommerce, where applicable.	☐	☐
LMS (learning management system) for ongoing sales and team training.	☐	☐
Brand / AI-citation monitoring, tracking how the company appears inside AI Overviews and LLM answers.	☐	☐
Community-platform tooling where the company runs or sponsors communities.	☐	☐

TECHNOLOGY RESULTS (79 QUESTIONS)

YES ____ NO ____ % YES ____

PILLAR 04

Sales & Success

Sales is where the post-2020 shift bites hardest. Average B2B quota attainment now sits in the low 40s; close rates are sliding; sales cycles have lengthened by 16–38%; nearly half of complex deals end in no decision; annual sales-rep turnover has climbed to 35–36%, three times the all-industry average. None of this is fixable by tweaking comp plans. It requires unapologetically right-tail talent, engineered hiring, real sales management, and a process and methodology designed to CREATE projects inside fragmented, consensus-driven buying committees, not merely respond to projects that appear in the inbox.

Sales Team	YES	NO
>75% of the team made quota last year and is on track this year.	☐	☐
Proper span of control, typically ≤ 6 reps per first-line manager.	☐	☐
All members of the sales team have been evaluated using a predictively accurate, sales-specific assessment, and the results are incorporated into individual development plans.	☐	☐
Territories, compensation plan, and account assignments have all been re-evaluated within the last 12 months.	☐	☐
Every rep has a defined prospecting target and is accountable for it.	☐	☐
New-logo sales are tracked separately from existing-customer sales.	☐	☐

Sales Team (continued)

	YES	NO
Real-time dashboards track at minimum: sales pipeline, activity (calls / meetings / emails), and target-account engagement and reps know their funnel math and how their personal financial goals map to those activities.	☐	☐
Sales reps are encouraged to hire their own virtual assistants (or ideally use AI expertly) to offload administrative and routine tasks.	☐	☐
Sales team includes a dedicated sales operations function.	☐	☐
Team includes the appropriate mix of full life cycle reps, inside sales, technical sales / sales engineers, and customer service (success.)	☐	☐
Marketing is included in sales team meetings.	☐	☐
Compensation includes a significant commission and bonus component, calibrated to attract right-tail ($\geq$ 2nd standard deviation) talent.	☐	☐
Every team member has a clearly written job description and regular reviews.	☐	☐
Sales team understands today's buying reality, 12–15 person committees, 84% of specs locked before vendor contact, 71% of orders to the top of the shortlist, and is trained to operate accordingly.	☐	☐

Sales Training

	YES	NO
Everyone undergoes outside sales training at least quarterly; participation is mandatory and tracked.	☐	☐
Sales training includes prospecting, consultative selling, negotiating, and closing.	☐	☐

Sales Training (continued)

	YES	NO
Sales training is tied to a named, defined sales process and methodology.	☐	☐
Marketing and management also participate in sales training.	☐	☐
Training is delivered at all levels of the sales organization (non-selling support, BDR, AE, manager, VP).	☐	☐
Training incorporates the established process and methodology, and CRM is customized to reinforce key training elements for accountability.	☐	☐
Training explicitly addresses consultative project-creation, business acumen, financial impact quantification, buying-team / buying-committee navigation, and helping the internal champion sell internally.	☐	☐
Reps are trained to use AI tools (research, prep, summarization, drafting) to increase bandwidth and support the consultative skills AI cannot replace.	☐	☐
Training is reinforced with consistent coaching (built around role-play), certification, and field coaching, not delivered as one-off events.	☐	☐

Sales Management

	YES	NO
Sales managers spend the majority of their time coaching and role-playing, not on administrative tasks (forecasts, expense reports, PTO approvals).	☐	☐
Sales managers were hired or developed specifically as managers, not promoted purely because they were top reps.	☐	☐
First-line managers have been evaluated using a predictively accurate, sales-management-specific assessment.	☐	☐

Sales Management (continued)	YES	NO
Sales managers hold reps accountable to defined activity, behavior, and outcome standards.	☐	☐
Sales managers run structured pipeline and deal reviews on a defined cadence and to a defined standard.	☐	☐
Sales managers actively use call recordings and conversational AI to coach to specific moments, not generic feedback.	☐	☐
Sales managers own quota attainment, ramp, and turnover for their team and are measured on all three.	☐	☐
Sales leadership (managers of managers) supports first-line managers with regular coaching and management training.	☐	☐

Quality of Sales Talent: Recruiting, Hiring & Onboarding	YES	NO
This section is intentionally expanded relative to the original ORE™. The data is unambiguous: traditional hiring approaches identify top sales performers only 20–30% of the time. Resumes (18%), behavioral assessments (20%), personality assessments (22%), reference checks (23%), and EQ tests (23%) have all been shown to be poor predictors of sales success. Structured interviews with scorecards (57%) and sales-specific, multi-measurement assessments (91%) are dramatically better. The cost of a single mis-hire in complex industrial B2B is typically \$300K–\$1MM in direct cost and opportunity, and roughly half of new sales hires fail to achieve quota. Hiring quality of sales talent is the single highest-leverage GTM decision most middle-market industrial companies make, and most are making it badly. (Learn more in my Guide on Common Sales Hiring Mistakes)		
Hiring is treated as an engineered, repeatable process, not an ad hoc, gut-feel exercise.	☐	☐

Quality of Sales Talent: Recruiting, Hiring & Onboarding (continued)	YES	NO
Continuous recruiting is in place (just like continuous prospecting), the pipeline of potential reps never goes dormant.	☐	☐
Every candidate is assessed using a predictively accurate, sales-specific assessment with a published technical manual provided by the vendor.	☐	☐
The assessment is purpose-built for sales, not a generic personality or behavioral tool dressed up in sales language, and is appropriate for pre-employment screening.	☐	☐
The assessment is customizable to the specific role (sell-cycle length, transaction size, buying-team complexity, decision-maker level, hunter vs. account manager, etc.).	☐	☐
Assessment pricing supports assessing EVERY candidate as the first step in the application process (helping with EEOC compliance and reducing wasted interview time).	☐	☐
Hiring follows a defined multi-step engineered process, including effective job posting (not just a job description), structured phone screen with scorecard, structured recorded video interviews drawing on assessment insights, on-site team interview, candidate close-the-sale conversation, and nuanced reference checks.	☐	☐
Resumes are read critically rather than used as the primary screen (resume-only predictive accuracy is ~18%).	☐	☐
Industry experience is not over-weighted relative to actual sales skill, particularly hunting, consultative selling, business acumen, and accountability.	☐	☐
Compensation is competitive for right-tail talent in complex industrial sales (typically ≥ \$125K base / \$250K+ OTE for senior AE roles).	☐	☐

Quality of Sales Talent: Recruiting, Hiring & Onboarding (continued)	YES	NO
Top candidates are told (and shown) that the company is committed to the infrastructure they expect, methodology, properly configured CRM, sales tech stack, AI tools, coaching, playbooks, accountability culture.	☐	☐
Hiring success is measured: % of new hires hitting top half within 12 months, % hitting quota by month 18, first-year turnover.	☐	☐
New reps reach profitable contribution within 12 months.	☐	☐
Onboarding is a structured 60–90 day program (or longer for highly complex roles), not orientation.	☐	☐
Performance Improvement Plans (PIP) are implemented promptly when warranted; non-performers are not allowed to degrade team performance.	☐	☐
The hiring process is documented and designed for obsolescence, leadership can run it internally without ongoing external dependency.	☐	☐

Process & Methodology	YES	NO
Sales process is named, defined, trained, coached, and reflected in CRM and pipeline stages.	☐	☐
Dashboards track KPIs including sales cycle, average deal size, close percentage, # of quotes per deal, CAC, lifecycle value, and no-decision rate.	☐	☐
Sales methodology is named, defined, trained, coached, and reflected in CRM.	☐	☐
Sales-management responsibilities are clearly defined and include the majority of time spent coaching and motivating.	☐	☐

Process & Methodology (continued)

	YES	NO
Compensation plan, territory management, and channel management are regularly revisited.	☐	☐
Sell cycles are predictable and minimized for the deal complexity involved.	☐	☐
≤ 10% of opportunities are lost to "no decision."	☐	☐
Sales knows when, where, and how capital will be allocated, and where projects stand on the customer's capital-allocation priority list.	☐	☐
Process and methodology are explicitly oriented toward CREATING projects via consultative selling, not just capturing projects already defined by the buyer.	☐	☐
Reps are equipped to help internal champions sell the project to their own buying committee, including ROI frameworks, risk mitigation language, and templates.	☐	☐

Tactics

	YES	NO
Team effectively uses various "Entry Sales" to gain access to new accounts.	☐	☐
Team selling and relationship mapping are routine in large deals and target accounts.	☐	☐
Sales is accountable for activity levels in disciplined, consistent outbound prospecting and sales, and opportunity qualification scorecards are routinely used.	☐	☐
A "value gap" is discussed, quantified, and confirmed with the decision maker before a quote is prepared.	☐	☐
Discounting is not used to win deals.	☐	☐

Tactics (continued)

	YES	NO
Named target accounts are based on ICP, and activity / engagement is tracked against them.	☐	☐
Playbooks exist for obtaining "approved vendor" status.	☐	☐
Consultative selling is used to identify compelling reasons to buy, and to buy from you.	☐	☐
Reps explicitly map the full 12–15 person buying committee, including economic, technical, user, influencer and blocker roles, on every complex deal.	☐	☐
Reps are trained to recognize and address consensus risk and to give the internal champion the tools needed to neutralize blockers.	☐	☐

Pipelines & Forecasting

	YES	NO
Close commits are > 90% accurate.	☐	☐
Pipeline stages are well defined and include objective, observable criteria for advancement.	☐	☐
Deals are dynamically (un)qualified and located in the correct stage using AI orchestration built on detailed opportunity qualification scorecards.	☐	☐
You are comfortable sharing forecasts with other departments (operations, finance, supply chain) and outside stakeholders (commercial bankers, board, sponsor).	☐	☐
Forecasting is taken directly from CRM dashboards without additional spreadsheets or documents to "adjust / massage."	☐	☐
Win / loss reporting is routine, rigorous, and includes marketing, and feeds back into messaging, content, and enablement.	☐	☐

Pipelines & Forecasting (continued)	YES	NO
No-decision losses are root-caused with the same rigor as competitive losses.	☐	☐
Forecast accuracy by rep and by manager is tracked and used for coaching.	☐	☐

Success (Customer Service)	YES	NO
Success team members are known as "sales", accept and embrace the role, training, etc..	☐	☐
There's a clear understanding of lifetime value, margin contribution, account management and farming contributions to revenue.	☐	☐
Success team members carry revenue and product offering related KPIs.	☐	☐
Company has a "Bow Tie" mindset around total revenue.	☐	☐

SALES RESULTS (81 QUESTIONS)

YES ____ NO ____ % YES ____

Overall Findings & Scorecard

Roll your pillar tallies into the table below. Most companies score below 35% Yes on a first honest pass. That is the normal starting point, and the source of the leverage. The questions to ask once the totals are in front of you are the same as they were in 2023, and still the most useful:

COMPONENT	YES	NO	% YES
Board Governance & Corporate Strategy (46)	_____	_____	_____
Marketing (98)	_____	_____	_____
Technology (79)	_____	_____	_____
Sales & Success (81)	_____	_____	_____
OVERALL	_____	_____	_____

Questions to ask once you have the totals in front of you

- What surprised you the most?
- What worries you the most?
- What are you most relieved by, or proud of?
- Who in the company would benefit from broad improvement?
- Who would be threatened by the changes required?
- Where would resources be diverted from to support an effort?
- Is the gap really important? After all, you have done OK without closing it. (Be honest about whether you can keep doing OK.)
- If the score were to stay where it is for the next 24 months, what happens to revenue, win rate, no-decision rate, sales-team turnover, EBITDA, and exit valuation?

A Maturity Model

Each diagnostic point represents a more detailed and nuanced continuum of proficiency. The Yes/No tally is a starting point, the more useful conversation is where on each continuum you sit, and where moves up the curve will create the most leverage for your specific business. For example:

Sales team understands the ICP (ideal customer profile) and how to prioritize accounts and projects.

expands into:

RUDIMENTARY	Leads, prospects, and opportunities are managed on an ad hoc basis. ICP isn't defined or part of organizational language.
TYPICAL	ICP is defined. Some casual scoring may consider vague ICP criteria. Account prioritization is inconsistent across the team.
ADVANCED	ICP is research based with qualitative persona conversations, SparkToro audience research, community insights, etc. The ICP is published, frequently discussed, and reflected in lead scoring. Marketing provides ICP-consistent prospect data to sales. Sales activity accountability includes fidelity to ICP. Outbound prospecting is limited to ICP. Buying-committee mapping is standard.

BEST PRACTICE

All levels of management discuss ICP in coaching, lead discussion, and pipeline review. Lead scoring explicitly weighs ICP elements. Opportunity qualification and forecasts require clarification of ICP fit. ICP is refreshed annually with third-party buyer research. AI is used to prioritize within ICP based on observable buying signals.

Every diagnostic question expands into a similar continuum. The 2026 ORE™ engagement begins by tallying Yes / No, then mapping each domain against this kind of maturity rubric, then engineering specific moves up the curve where they will create the most pipeline, revenue, and EBITDA leverage for your particular business.

The Path Forward

Companies got complacent during the 2010s. Many came to believe that if they did digital marketing well enough, leads would arrive, and sales would close them. That has not panned out. Instead of adjusting, most are still lamenting falling close rates, missed quotas, deals dying in no-decision, and increasing competitive pressure, and treating those symptoms as a cycle that will revert.

It will not. These changes are secular. The longer we wait to adapt, the harder it is to catch up.

New logo account wins and stronger margins aren't just pending some market shift. They will require decisive action.

At a high level, middle-market industrial companies need to do two things:

- Reach buyers long before they are thinking about buying, build trust, presence, and reputation through video, audio, off-domain content, partner ecosystems and community, so that we are already known when the journey begins.
- Improve our ability to CREATE buying projects through extraordinary consultative selling, uncovering problems beyond pain, quantifying business outcomes, building urgency, and helping the internal champion sell the project across an unwieldy buying committee.

In practice, that requires:

- Rebuilding marketing for trust and demand creation, passively consumable content in the channels buyers actually inhabit, plus a credible presence inside AI Overviews and LLM answers.
- Engineering hiring around a predictively accurate, sales-specific assessment and a structured multi-step process, and accepting that right-tail (≥ 2 nd standard deviation) talent is non-negotiable.
- Returning to serious investment in sales training and, even more importantly, in sales management, coaching, role-play, deal review, and accountability.

- Building the supporting infrastructure: properly configured AI first CRM, defined sales process and methodology, deal-qualification scorecards, pre- and post-call planning templates, detailed playbooks, AI woven through the customer journey including tools for prep and summarization, conversational intelligence for coaching.
- Tracking the right metrics, including no-decision rate, branded search trend, AI-citation share, ramp time, first-year turnover, % of new hires in the top half of the team, alongside the traditional pipeline and revenue numbers.

The good news is that most of your competitors are still trying to make the old playbook work. The companies that adapt first will create a competitive advantage that will be hard to overcome once established, and will be able to differentiate through the way they sell, rather than relying on product features that buyers increasingly view as interchangeable. The key is to start now.

About Ed Marsh & How to Engage

Ed Marsh is a business consultant who helps family and investor owned middle-market industrials and manufacturers, and the private equity sponsors who back them, grow revenue. He created the Overall Revenue Effectiveness™ methodology to help manufacturers apply the process-engineering discipline they already use in operations to the revenue growth function: integrating strategy, marketing, sales, and technology.

Ed's Directorship® certification from the National Association of Corporate Directors supports his advisory work with private company boards and senior executives. His career in industrial sales and manufacturing marketing complements his management perspective. He has extensive technology experience as a partner with HubSpot and Drift, and as CRO of IntentData.io, Inc. Ed is a graduate of Johns Hopkins University, a former Ranger-qualified U.S. Army Paratrooper, and the former Export Advisor to American Express.

How a 2026 ORE™ engagement typically runs

- Diagnostic and benchmark, this document, expanded into structured interviews with leadership, marketing, sales, and operations; review of CRM, marketing platforms, content, win/loss, hiring data, and AI usage.
- Findings and prioritization, a written set of findings tied to revenue and EBITDA impact, mapped against the maturity model, sequenced for highest leverage first.
- Engineering improvement, a defined roadmap with owners, milestones, and metrics: strategy clarification, marketing reorientation toward trust and demand creation, sales hiring and management upgrades, methodology and process work, technology and AI deployment.
- Implementation support, coaching, fractional leadership, and hands-on guidance to put the system on the ground; designed for obsolescence so the company can ultimately run it internally.

ABOUT ED MARSH & HOW TO ENGAGE

If too many of your answers in this diagnostic landed on “No,” the conversation is worth having.

Book a no-obligation 30-minute meeting with Ed



Ed Marsh

Founder, Ed Marsh Consulting

Ed Marsh is a Johns Hopkins University graduate and former Ranger-qualified airborne infantry officer who has worked in industrial sales and marketing since 1992. His career spans significant international experience, including roles in Germany, India, Nigeria, and Brazil, giving him a firsthand view of how sales organizations perform under vastly different market conditions. He now advises middle-market private-equity sponsors and industrial portfolio companies on building Go-To-Market organizations that scale. Ed is Directorship® Certified by NACD and Private Equity Portfolio Company Governance Certified by the Private Directors Association. He holds both a boardroom perspective and an operator's understanding of what it actually takes to drive strong organic revenue growth.



Helping middle-market private-equity sponsors and industrial portfolio companies grow organic revenue with manufacturing rigor – all in a Zero Trust, Zero Click world.

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